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PLM Portfolio and Project Management (2015)
Project timeline

Submit improvement requests and prioritize

Collect improvement requests and prioritize by subscribing

Collect

Follows, moderates, and comments on improvement request

Speaker's Corner Sessions

Final Call
Dec. 08, 2014

End of collect phase
Dec. 12, 2014

Select improvement requests to implement

Select

Makes detailed analysis and decision on implementation

Project Team

Develop improvements
Deliver as SAP Notes or in support package

Develop

Develops and delivers SAP Notes and support packages

Use productively in customer software

Use

Improves process for Customer Connection

Provide feedback

Selection Call
July 17, 2015

Provide feedback on productive use

Delivery Call
Dec. 2015

Project Team

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SAP selection criteria for requested improvements

SAP selection criteria

- Positive impact for many customers (Requested improvements need minimum 5 subscribed customers to qualify)
- Global relevance of the improvement
- Realization time and effort (maximum 6 months of development)
- Easy and fast deployment (can be delivered in Notes / Support Packages, no structural changes, must be ‘switchable’)
- Down-port to releases in mainstream maintenance as per market demand and feasibility

Improvement Requests submitted by customers

• small enhancements to ensure product quality
• Improved support for your day-to-day business
### Overview about scoped Improvement Requests

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td># IRs submitted by customers</td>
<td>199</td>
</tr>
<tr>
<td>- # rejected IRs (not qualified / lack of customer subscriptions)</td>
<td>79</td>
</tr>
<tr>
<td>- # out of scope</td>
<td>4</td>
</tr>
<tr>
<td>= # qualified IRs (5 or more subscriptions)</td>
<td>116</td>
</tr>
</tbody>
</table>

**Thereof:**

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td># IRs already available</td>
<td>2</td>
</tr>
<tr>
<td># IRs scoped (planned for development)</td>
<td>24 + 11</td>
</tr>
<tr>
<td># IRs rejected (overview of reasons see in chart on the right)</td>
<td>76</td>
</tr>
</tbody>
</table>

### # of qualified IRs

- **Planned for development:** 40
- **Delivered:** 31
- **Rejected - prioritization:** 35
- **Rejected - exceeding size/effort:** 5
- **Rejected - violating design rules/others:** 2
In total: 43 Improvement Requests Delivered

Current Status

<table>
<thead>
<tr>
<th># IRs submitted by customers</th>
<th>199</th>
</tr>
</thead>
<tbody>
<tr>
<td># rejected IRs (not qualified / lack of customer subscriptions)</td>
<td>79</td>
</tr>
<tr>
<td># out of scope</td>
<td>4</td>
</tr>
<tr>
<td># qualified IRs (5 or more subscriptions)</td>
<td><strong>115</strong> (2 IRs merged)</td>
</tr>
</tbody>
</table>

Thereof:

<table>
<thead>
<tr>
<th># IRs already delivered</th>
<th><strong>43</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td># IRs rejected (overview of reasons see in chart on the right)</td>
<td><strong>72</strong></td>
</tr>
</tbody>
</table>

# of qualified IRs

- Delivered / "released for customers"
- Rejected - prioritization
- Rejected - exceeding size/effort
- Rejected - violating design rules/others
Gantt Chart
It is possible to create and delete multiple relationships between selected tasks using actions under new added button ‘Relationships’. This functionality is available for the operative project, project simulation and project template. You can carry out this action in details view, table view and graphic view.
In multi-project monitor, when the project header is collapsed, all the phases/root tasks/milestones will be displayed in the collapsed project header row, as showed in the screenshot.

A new Badi method is provided, you could filter the phases/root tasks/milestones to be displayed in the project header row; you can also define color for each project element.

New graphic view user settings options are provided to control the display of the MPMon.
It is now possible to display mirrored task relations in Multi-Project Monitor.
It is now possible to switch the Gantt Chart to Full Screen Mode.

The Full Screen Mode of the Gantt Chart provides buttons for the most important functionalities.
D7818: PPM-PRO: Graphical comparison of planned with actual dates in Gantt graphic

Note 2249265

By activation of the CC3 switch (Area 0013, Name 0004) you have now more comparison options in the Gantt, including comparison with actual dates.

CC3 switch is not active

CC3 switch is active
Idea D7868 – Enhance GANTT-view "Fit" with an offset and automatic refresh

Note 2184926

It is now possible to display additional GANTT information (like planned date, name, status, duration, responsible role/resource, etc...) in the view ‘Fit’. The already existing example implementation of BAdI DPR_GANTT method IF_EX_DPR_GANTT~GET_GANTT_PARAMETERS has been enhanced accordingly.
Idea D7903: Download data from Multi-Project Monitor to Excel
Note 2221969

By activation of the corresponding CC3 switch (Area 0013, Name 0005) it is possible to export all rows or only visible rows from Multi-Project Monitor to Microsoft Excel. Hierarchy is now represented in the export by using indents, icons are available, grouping functionality in the excel file is available with SAP_UI, Release 7.40 SP13.
Project Management
By project type customizing define if the creation or copy of roles in operative projects is prohibited. Then only the include of roles from project templates is allowed: in the Resource Staffing Overview screen button ‘Create Role’ is hidden, in Resource Details screen the ‘Create Role’, ‘Copy Role’ and ‘Copy Role and Staffing From…’ are hidden.
Idea D7907 – Adapt width of structure tree by slider instead of user settings option

Note 2178262

The width of the project structure tree can now be adjusted dynamically by using a moveable UI control. Before this was only possible by adjusting the field ‘Tree width’ of the user settings.
Idea D7871 – Enable transfer of Project and Checklist Templates between Systems (Dev->QA->Prod)
Note 2158891

Functionality to export and import project templates as well as checklist templates is now provided by the corresponding buttons (Work Center Portfolio and Project Administration-> Project Management Templates). This allows to transfer project templates and checklist templates between systems.

The latest Import statistic is displayed on the ‘Additional Data’ Tab. Exporting the Template is also possible via the link next to the import statistics.
Even the task has ‘completed’/’lock’ status, it still can be used as predecessor to create relationship to another task which has ‘create’ or ‘release’ status etc., the attributes for such a relationship can also be edited, both in details view and in graphic view via context menu.
It is possible to assign multiple roles to a task in one single step.
This feature optimizes system performance when accessing change documents in *Portfolio Management* and *Project Management*. By loading only the change documents of the requested tab, the current feature prevents long access times or even timeouts when first accessing the change documents for an object or element during a session.
The user can select multiple tasks to set the same status and process all tasks with one click.
It is now possible to define ‘Scheduling of All Project Elements’ in the user settings. This enables that released Project Elements are automatically scheduled and it is not necessary to trigger the scheduling manually.
It is now possible to delete projects in the project dashboards.
Idea D7905 – PPM-PRO: Custom E-Mails from each project element

Note 2159798

It is now possible to send E-mail directly from project elements
It is now possible to display the confirmed effort for roles in the Resources tab.
Idea D7771 – Change the type of schedule (Top-Down, Bottom-Up)
Note 2183391

It is now possible to switch the scheduling type in the project.
The proposed solution enables you to synchronize the statuses of Project Management project elements with those of the linked PS elements if the following conditions are fulfilled:

- You use the ERP integration of SAP Portfolio and Project Management with ERP accounting
- You use the option to automatically create PS projects for Project Management projects and you assign them to the Project Management project.

By using a corresponding implementation of the interface IF_DPR_APPL_PLUG_IN_SUBSYSTEM, the new feature has been made available without manipulation of the standard code.

This is available via note 1406191
The proposed solution enables the creation of status reports using Microsoft® Office PowerPoint Documents:
• automated project status reports
• project information can be consolidated
• PowerPoint Template is available in company template
• editable and customizable
• can be used for single and multi-project management

This is available as Consulting Solution. See note 1814510.
Idea D7847 – Non-Sequential Phase Processing
Note 2162433

Now possibility is provided of processing phases sequentially or non-sequentially. This can be defined in the project. Then phases can be released independent of their sequence in the project and completed phases can be reset independent to released. Sequence of phases in the project can be changed also after phases have been released or completed.

Attribute can be changed before project is released. In case phases are not linked to portfolio item decision points or phases are not customized as “Release Successor Phase Only After Approval” the project can be flagged as non-sequential.
Idea D7791 – Aggregation of data in project for all project hierarchy levels

Note 2164433

It is possible to display saved aggregated data (duration, confirmed work, percentage of completion, remaining work, and work) for a project directly in the project’s "Detail" view on the "Dates and Work" tab. An aggregation can be triggered with a new aggregation button on project definition level.

The aggregated data can be viewed at a glance for the project elements project, task, phase, checklist and checklist item. The attributes duration, confirmed work, percentage of completion, remaining work, and work are supported.
The description of authorization object CPRO_PTYPE is misleading. It leads to the conclusion that the authorization object is actually required to display or edit projects of its respective type. The description of authorization object CPRO_PTYPE is changed so that it is stating clearly that the authorization object is not necessary to display or edit projects, but only to select the project type of a project.
You can use shortcut Ctrl + S to save your changes instead of pressing Save-button. This feature is supported only via NWBC and not from the Portal; it's not supported in graphical view of Project Management, too.
Idea D7561 – PRO: Update staffing according to tasks

Define in Project Global Settings, whether a new push button 'Update Staffing According To Tasks' is displayed. Pushing the button triggers calculation of staffing distribution according to tasks that are assigned to a distinct staffing.
In the “Details” subview of a project’s “Resources” view, it is possible with this improvement to start the “Update Role According to Tasks” function for multiple roles at the same time.
Idea D7797: Move Up/Down Buttons  
Note 2194076

It is now possible to move Project Elements Up and Down with Buttons.
This improvement will provide milestones with a fixed duration, no work and only one constraint date. The idea being that a milestone is a point in time without duration and hence only a single date. However, in order to not to restrict the customers too much, it is possible to provide a duration of any integer value for the milestones in the global settings.
Idea **D8033** – Eliminate the automatic deletion of relationships due to status cancelled

**Note 2223508**

It is now possible to avoid the deletion of relationships during cancelling of task.
Status ‘Completed’ or ‘Finished’ will be explicitly set to all the subordinate elements on each level of a project hierarchy, with just a few clicks.
Idea D7414 – Additional Display Options for Assignments to Project Elements Note 2208309

<table>
<thead>
<tr>
<th>Project Element</th>
<th>S</th>
<th>N</th>
<th>D</th>
<th>O</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prototype Note Development</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Phase</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Create Task</td>
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<td></td>
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<tr>
<td>Create</td>
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<tr>
<td>Include</td>
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<td>Delete</td>
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<td>test</td>
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<tr>
<td>Spezification</td>
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<tr>
<td>Implementation</td>
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<td>Test</td>
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</tr>
<tr>
<td>Task Pool</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Pool 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- 3 new Columns in Project Tree
- Navigation to Tab „Notes“ / „Documents“ / „Object Links“ via Icon
- Tooltip shows last 3 notes
D7906: Option “Earliest/ Latest” must be project-specific for Gantt-Chart and not user specific

Note 2253643

By activation of the corresponding CC3 switch (Area 0013, Name 0009) it is possible to define for a project which dates are used for display of calculated start/finish dates: Earliest Dates, Latest Dates or according to user settings.
Portfolio Management
Idea **D7729** – Enable Global/User-Independent Favorites/Views in Resource/Staffing FES dashboards

Note 2179488

It is now possible to copy Views and Favorites from one user to other users.
It is now possible to export the Staffing and Resource Overview to Microsoft Excel.
Note 2169546

New feature is provided to consider the User group authorization on the project while user accesses the Projects in Resource Management. Following is an example displayed below.

User has authorization on the project and role only via User Group

User authorized only via user group is able to view Project in Staffing FES
Calendar information will be visible in Item Details “Overview / General Information” tab and will be used for date related calculation e.g. Forecast Duration.

If the Portfolio Item is linked to PRO Project and Project has the Calendar, Item will display and use this Calendar. Otherwise, Item will use the Calendar from its Location or the Default customizing.
You can use shortcut Ctrl + S to save your changes instead of pressing Save-button.

This feature is supported only via NWBC and not from the Portal; it's not supported in graphical view of Project Management, too.
You can now save the Resource Management Screen Layout for future access. Once this feature is enabled, user can timeframe and the period breakdown in his personalization. When user access any Resource Management Screens, the save timeframe and period breakdown will be used to display, Resource/Staffing Data.
Idea D1407 – PPM-RES: Show notes to resource in Staffing Overview

Note 2192298

With this improvement the functionality to create, display and change notes for resources or candidates inside the project is now provided in addition in the staffing overview to simplify the work of the resource manager.
Idea **D7741** - Resource/Staffing avoid FES Lost Focus after Save/Refresh

Note **2219859**

Once ‘Save’ is processed the node remains expanded

The above changes are applicable for staffing and resource overview Fast Entry Screens
Idea D6473 - End status handling of Item, Review, and Whatif Note 2184492

On changing the status to end status, the Item/Review/Whatif is locked from further editing unless the status of the object is reset to another initial status.
Idea D6325 - Include Project Number in Role Search of Staffing Overview

Note 2220076

New Search Criteria „Project Number“ in Role Search

Search via Project Number enables an unique, easier and faster way to search for projects.
By activation of the corresponding CC3 switch (Area 0002, Name 0023) bucket rollup is done on item status of status group ‘Active’. Without the activation of the switch, the rollup is only triggered after the item status is changed to ‘Approved’ for items with the customizing setting ‘Rollup - Approved Items’.

**CC3 switch is not active**

- No initial bucket rollup on item status change
- Rollup triggers delta values in financial and capacity planning
- Inconsistent data in bucket financial and capacity planning

**CC3 switch is active**

- Bucket Rollup initially triggered
- Delta Update is triggered
- Rollback possible

---

D6830: Bucket Rollup on Item Status of Status Group „Active“

Note 2225023
Appendix
Next steps

- Joint review of specification
- Test and acceptance of the improvement by IR Owner
- Presentation of results in Delivery Call webinar (Dec. 2015)
The SAP Customer Connection Program – Frequently Asked Questions (FAQs)

The present FAQ document is a quick reference guide to the most relevant questions and answers about the SAP Customer Connection program.
Improvement Request - Status

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identified</td>
<td>Improvement Request is submitted by a customer (the request owner) on the Customer Influence site.</td>
</tr>
<tr>
<td>Qualified</td>
<td>Improvement Request is subscribed by at least 5 customers after the end of collect phase and is, as a next step, analyzed by SAP in the selection phase.</td>
</tr>
<tr>
<td>Scoped</td>
<td>Improvement Request is planned for development within the develop phase of the focus topic.</td>
</tr>
<tr>
<td>Handed-Over</td>
<td>Improvement Request needs to be analyzed and decided by additional party within SAP or could not be considered in the current development plan. It is in evaluation by SAP until a final decision has been taken (planned for a later cycle/in development scope/rejected). It is not a long-term status. In addition, it is frequently tracked within SAP – during and after focus topic project timeline. Regular update and final decision will be made available on request.</td>
</tr>
<tr>
<td>Rejected</td>
<td>Improvement Request is not planned for development within SAP in a reasonable future.</td>
</tr>
</tbody>
</table>
# Improvement Request – Rejection Reason

<table>
<thead>
<tr>
<th>Reason</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved within SAP decision meeting</td>
<td>Improvement request was analyzed and is implementable and shippable via note, consulting note or service pack</td>
</tr>
<tr>
<td>Already in development planning</td>
<td>Improvement Request was analyzed and is already part of an existing product back log and/or is planned to be shipped via EHP or a new product release</td>
</tr>
<tr>
<td>Addressing country specific/legal requirements</td>
<td>Improvement Request was analyzed and is part of a localization product which was not part of the Focus Topic scope.</td>
</tr>
<tr>
<td>Exceeding size and effort</td>
<td>Improvement Request was analyzed and is not implementable and shippable via note or service pack.</td>
</tr>
<tr>
<td>Lack of subscribed customers</td>
<td>Improvement request was subscribed by less than 5 customers</td>
</tr>
<tr>
<td>Out of scope</td>
<td>Improvement Request does not fit into scope of Focus Topic, a new Focus Topic needs to be requested (please refer to section 2- how to request a focus topic)</td>
</tr>
<tr>
<td>Prioritization</td>
<td>Improvement request was analyzed and could be shippable via Note or SP, however due to the number of implementable improvement requests a project back log prioritization had to take place</td>
</tr>
<tr>
<td>Violating design rules</td>
<td>Improvement request was analyzed and is not implementable and shippable via note or service pack and is violating SAP design rules</td>
</tr>
<tr>
<td>Addressing partner solution</td>
<td>Improvement request was analyzed and addresses a partner product/solution</td>
</tr>
</tbody>
</table>
SAP Improvement Finder

Visit **SAP Improvement Finder**:  
- **Find** areas for improvement in your SAP products  
- **Use** established maintenance processes (SAP Notes; support packages)

Benefit and Use

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