Implementation Best Practices, Case Reviews and Add-on Solutions

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THE BEST-RUN BUSINESSES RUN SAP™

SAP

Agenda

Implementation Considerations

- System Architecture
- Server Configurations
  - Portal / RPM / BW / Solution Manager / ECC
  - Sizing

Implementation Case Reviews
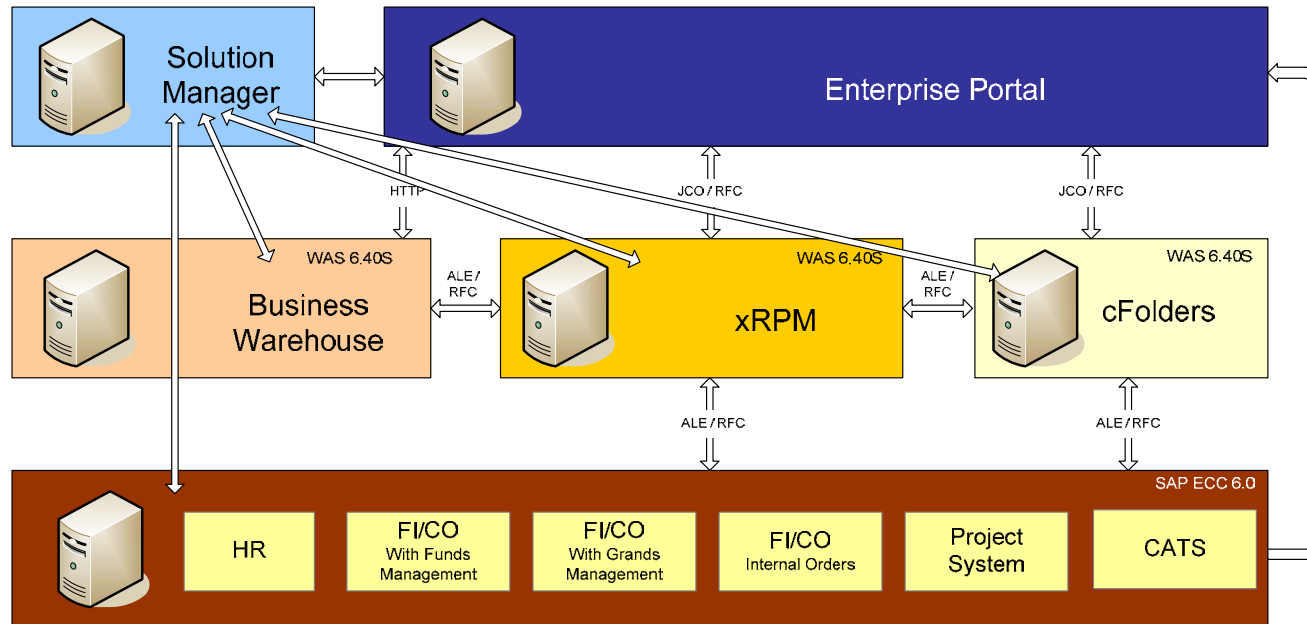
- Softtek
- Sigma-Aldrich

Penitus Add-on Solutions

- Financial Planning and Budgeting Integration
- Issues / Change Management
- Sigma-Aldrich

RPM System Architecture

The following outlines the components that make up the PPM environment.

Server Configuration

To define server needs, you must determine which components can be combined on a single server.

Component	Development Environment	QA Environment	Production Environment
RPM cFolders			
Enterprise Portal Business Warehouse			
Solution Manager			

Server Sizing

The minimum server requirements are as follows:

Type of Server	Component	Size
	Processor	2 processors minimum 1.6 GHz / 18MB
	RAM	8 GB
	Disk Space – Operating System and executables	160 GB
	Disk Space – Data	500 GB
	Processor	2 processors minimum 1.6 GHz / 18MB
	RAM	16 GB
	Disk Space – Operating System and executables	160 GB
	Disk Space – Data	500 GB

PPM Process Overview

PPM Processes

SAP PPM supports the following business processes:

Portfolio Management
• Portfolio Structure
• Initiative Management
    ■ Charter / Business Case Development
        ■ Planning (Financial / Resource table)
    ■ Approval Gates (Decision Points throughout initiative lifecycle)
	RPM

Item Management • Item creation • Planning (Financial / Resource table view) • Approval Gates (Decision Points, throughout project lifecycle)	**RPM**
Project Management • Create detail project plan from template • Plan Project (WBS, Networks, Tasks / Activities, Milestones, Checklists, Work Centers, etc.)	**cProjects** **PS** **MS Project** **Primavera**

PPM Processes

Project Management (Continued)	**cProjects**
■ Project Execution	**PS**
■ Time Reporting	**MS Project**
■ Activity / Task Statusing	**Primavera**
■ Cost Management	**ECC / Financial , monitored from RPM Dashboard**
■ Project Governance & Control	**RPM (Dashboard)**
■ Project close	**cProjects** **PS** **MS Project** **Primavera** **ECC / Financial**
Resource Management ■ Resource Monitoring ■ Project Staffing	**RPM / cProjects**

Softtek

Professional Services / IT Portfolio Solution

Softtek Profile and Business Challenges

Softtek:

- Creator and leader of nearshore service provider model for North America, 25-yrs old
- Latin America's largest private IT service provider
- Presence in 13 countries in North America, Latin America, Europe, and Asia
- 6,000 professionals, CMM level-5 assessed
- US $179.3M Revenue (2006)
- 85% of revenues come from repeated businesses

The Business Challenges:

- New business analysis and commitment process slow, leading to missed business opportunities
- Profitable business not always pursued, watered down with less optimal engagements
- Critical resources often overcommitted and under-delivering
- Activities to which shared resources are assigned not accurately planned/accounted-for
- Service business systems not integrated with project business, limiting resource visibility and creating issues with revenue recognition

The Business Solution

Business Strategy & Initiatives

Streamline Processes

- Optimize Proposal, Review and Project Initiation processes
- Deploy solution that aggregates opportunities, presents them to management, and accelerates the commitment of resources
- Consolidate resource management and revenue recognition of services business with project business

Pursue More Business

- Remove bottlenecks inhibiting growth and impairing ability to pursue new business
- Increase volume of new opportunities that can be pursued & reviewed
- Improve ability to make "fact-based" decisions

Before

- Information used to support decision-making not readily available
- No central location to monitor resource commitment/availability
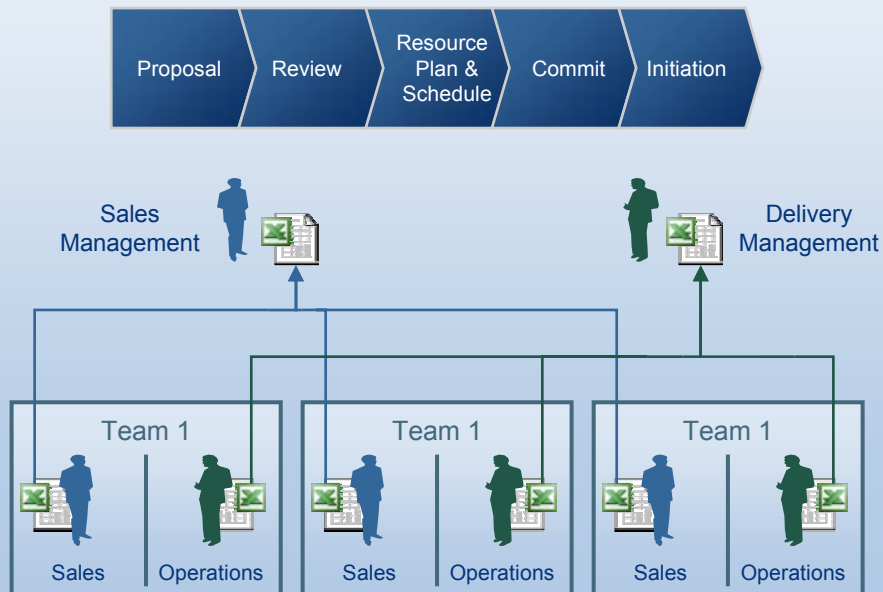
After

- Information available real-time with less effort, improved revenue recognition
- Better monitoring of resource & customer commitments
- Go/no-go based on more reliable data/ consistent metrics

The Business Solution - Detail
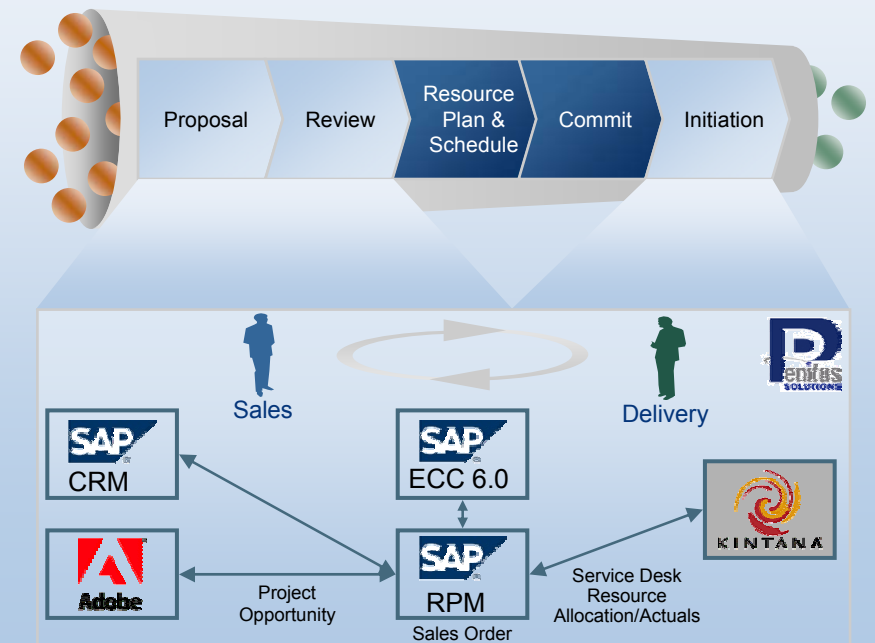
- **Opportunity (RPM Object Controlled by Sales force)**
  - Stage gate through the opportunity process
  - Use Capacity Planning / Financial Planning to estimate project and do gross margin analysis
  - When decision point reaches 80% probability opportunity copied (automatically) to operational project

Operational Project (controlled by Operations)

- Create PS project when opportunity is won
  - Full project structure from template (WBS, Network, Activities, activity elements, milestones)
- PM Plans project in PS
  - Network Activities
  - Work Centers / Plant = ROLES in cProject
  - Work = Demand
  - Schedule
  - Real-time update to cProject / RPM
- Project Planning Complete (Decision point)
  - Automatically create sales order (SD) and link header to PS Billing WBS
- Project Audit Complete (Decision Point)
  - Release PS project

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■ **Operational Project (controlled by Operations)**

■ Resource Management
  – Work Centers / Plant planned on PS activities are uploaded real-time into RPM/cProject as roles with the planned demand (sum of Work estimated on each activity / activity element)
  – Resource Manager monitors project demand on Staffing Dashboard
  – Resources are staffed via standard RPM staffing screens and resources are allocated to PS activities using workforce planning engine of ECC

■ Project Execution
  – Time Reporting via Employee Self Service (ESS) CATS
  – Real-time schedule / planned cost updates from PS to RPM dashboard
  – Dashboard updates of project actual costs / Revenue via standard RPM ALE

■ Revenue Recognition
  – Utilize standard PS results analysis functionality to calculate accrued revenues and cost of sales for various revenue recognition models

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IT Strategy / Initiatives

Centralized Platform

- Penitus constructed web service linkages between portfolio (RPM), project initiation (CRM/Adobe), service management (HP-Kintana) financials and human resources (ERP)
- Information served up in UI via SAP Enterprise Portal and Webdynpro
- Single, role-based interface for all users in a browser (no client install) via SAP EP

Differentiation from Conventional

- Leverage portfolio management best practices developed over several years
- Support for full lifecycle
- Automate Processes; (notifications / approvals)
- Proved capability via POC
- Leverage existing IT investment and skills

Why Enterprise SOA?

Quality and cost control

- Webdynpro dashboards aggregate information across sales and operations
- Previous approaches have had limited success due to manually-intensive, disconnected systems

Extensibility and Reusability

- Ready integration of new and legacy systems
- Reuse of granular services, build on existing systems and re-orchestrate to support processes of the future

Flexibility and integration

- Flexible, reuse of services & platform – solution not tightly-coupled or hardwired
- Overcomes shortcomings of disconnected and manually intensive solutions
- Access with web services – introducing abstraction to legacy system simplifying potential migration

customer

Benefits and Proof Points (The Results)

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Business Benefits

Operational benefits

- Streamlining capture of critical opportunity information enabling better, fact-based decision-making for opportunity go/no-go
- Resource commit and project initiation more consistent across enterprise leading to improved resource utilization and better project selection
- Increasing governance throughout project initiation and execution
- Converged resource management/allocation across services and project business
- Improved revenue recognition capabilities and resolved issues with legacy environment
- Improving information and process transparency into services business

Life-cycle Costs Reduction:

- Opportunity proposal through to resource commit to project initiation and monitoring orchestrated

Proof Points

- Significant effort reduction during the opportunity management and resource management data maintenance process
- Considerable effort reduction of transactional data entry process

- Accurate revenue recognition has been realized
- Financial & capacity planning (top-down) at project and organization level has been implemented

High-Level System Architecture

User Interface

Enterprise Portal

Adobe — *New Project Proposal*

SAP CRM — *Opportunity*

Business Logic

Penitus Solutions — *Issue Mgmt Change Req Mgmt*

SAP RPM
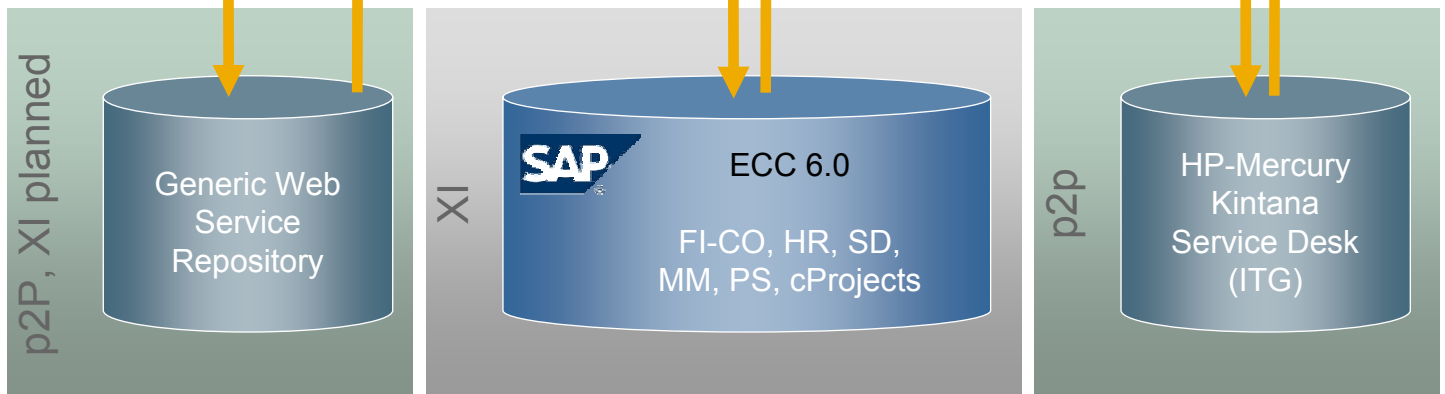
- Issues
- Change Requests

- Planned Costs, Headcount
- Projected Revenues

- Actual Costs, Time (Resource)
- Revenues

- Resource Allocation

- Time Entry
- Resource Details
- Status

Back-End Integrated Systems

p2P, XI planned

Generic Web Service Repository

XI

SAP ECC 6.0

FI-CO, HR, SD, MM, PS, cProjects

p2p

HP-Mercury Kintana Service Desk (ITG)

→ Web Service

Sigma-Aldrich

Product Innovation and IT Portfolio Solution

Sigma-Aldrich Profile:

Sigma-Aldrich:

2007 Performance

- $2.0 Billion in Sales
- 21.5% Pretax Margin
- 20.6% Return on Equity
- Strong Cash Flow

- 130,000 Products
- 1,000,000 Customers
- 80,000 Accounts
- 8,000 Employees in 36 countries
- 4 Business Units: Research Biotech, Research Essentials, Research Specialties & SAFC.

A Major Supplier in Life Science & High Technology

Where Does Project Management Occur Across the Corporation?

Essentials

Biotech

Corporate
Functionality

SAFC

Specialties

Sigma-Aldrich Profile:
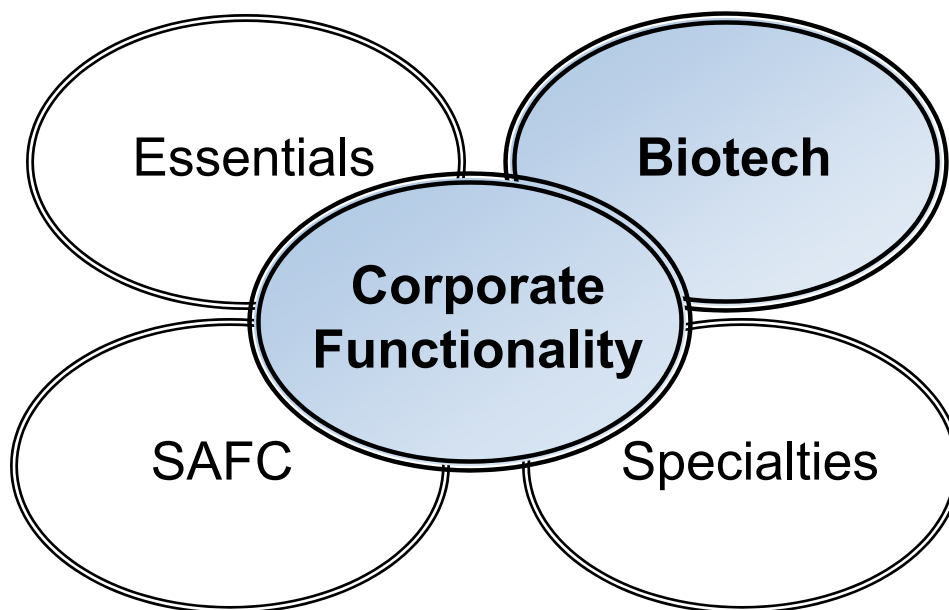
Systems Implemented:

- Resource & Portfolio Management (RPM 4.0)
- cProjects 4.0
- cFolders
- ERP Integration:
    - Financial Information
- Business Warehouse 7.0

- Customizations:
    - Idea Portal
    - Discounted Cash Flow (Financial Planning)
    - Timesheet
    - Solution Manager Integration for RPM
    - Custom Field Lookups

User Base:

- Biotech – 160 users:
    - R&D, Marketing, PMO, Resource Managers, Project Managers, Executive.
- I/S – 350 users:
    - PMO, Resource Managers, Project Managers, Global IS Users, Executive.
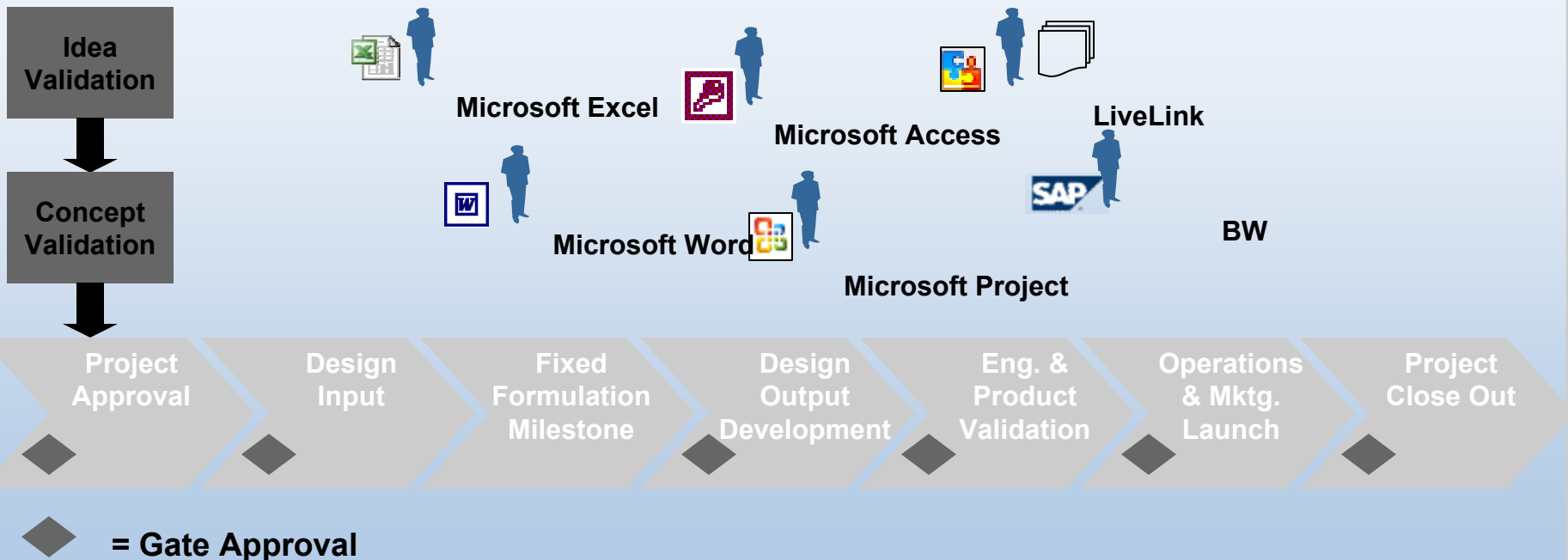
Biotech's Business Drivers:

- Need to ensure we are selecting the right products and getting them to market at the right time.
- Pressure to have shorter concept to production cycle time for products.

- Project management around new product introduction process.
- Continuous pressure to reduce costs.
- Deliver projects on-time and on-budget.
- Improve production quality and regulatory compliance.

Before

- Manual process
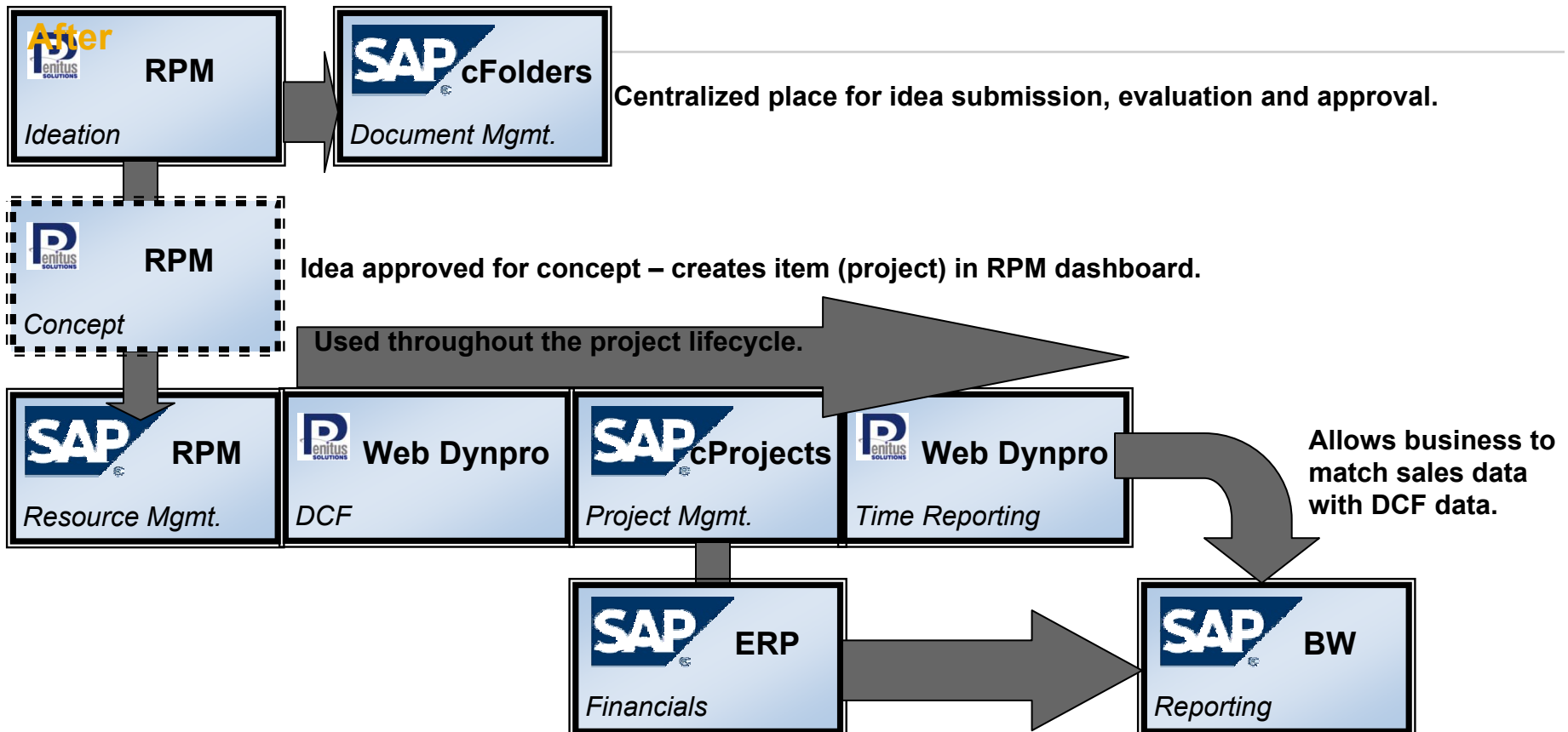- No time tracking
- Little/no visibility to resource availability

Idea Validation

Concept Validation

Microsoft Excel

Microsoft Word

Microsoft Access

Microsoft Project

LiveLink

BW

| Project Approval | Design Input | Fixed Formulation Milestone | Design Output Development | Eng. & Product Validation | Operations & Mktg. Launch | Project Close Out |

◆ **= Gate Approval**

Biotech Solution:

Biotech Implementation:

- Centralized Process (Ideation to Product)
- Marketing/Technical Evaluation & Scoring of Ideas

- Electronic Approvals / Workflows
- Visibility to Projects
- Online DCF

- KPIs/Dashboard Indicators
- Visibility to Resource Assignments & Availability

- Common Repository for Project Documentation
- Standardized Project Processes & Templates
- Time reporting

After

RPM
Ideation

→ **SAP cFolders**
Document Mgmt.

Centralized place for idea submission, evaluation and approval.

RPM
Concept

Idea approved for concept – creates item (project) in RPM dashboard.

Used throughout the project lifecycle.

SAP RPM
Resource Mgmt.

Web Dynpro
DCF

SAP cProjects
Project Mgmt.

Web Dynpro
Time Reporting

Allows business to match sales data with DCF data.

SAP ERP
Financials

SAP BW
Reporting

Biotech's Ideation Form:

Ideation Dashboard:

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SAP

Welcome Carolyn O'Hearn

Help | Log Off

[Search] Advanced Search

| Project Management | Portfolio Management | Content Administration | User Administration | System Administration | **R & D Idea Management** | Design Collaboration | IS Request |

Idea Management

Idea Management | History | Back Forwar

R&D Idea Dashboard

| Ideas In Process | Approved | Closed Ideas |

[📄 Submit a new idea]

	Structure	Description	External ID	Requestor	Date Logged	Decision Point	Current Status	Technical Grade	Marketing Grade
	▼📁	Biotech R&D	RD-0001						
	▼📁	BioInformatics	RD-0001-0001						
	▪	TEST FF 202	MI-000052	Freddy Farinango	2008/03/12	Idea Validation	In Process		
	▪📁	CV 11.03.2008 11.44	EI-000036	Celi Vel	2008/03/11	Idea Validation	In Process		
	▪📁	CV 11.03.2008 11.18	PI-000051	celivel	2008/03/11	Idea Validation	Pending		
	▪📁	CV 06.03.2008 15.10	MI-000041		2008/03/06	Concept Identification	In Process	B	

Technical Idea Evaluation:

Technical Validation

Product Grade (Must use values on dropdowns)

Q1. How would you classify this product?	I
Q2. Technical Feasibility?	Q
Q8. Is there Freedom to Operate (FTO)?	OP
Product Grade	A

Comment Validation

Comment:

Comment Log:

Add Comment

Save

PI-000003

- Idea Overview
- **Technical Validation**
- Marketing Validation
- Decision Points

Marketing Idea Evaluation:

Marketing Validation

PI-000003

Idea Overview

Technical Validation

Marketing Validation

Decision Points

Scoring Module

Q3. What is the target market? — A

Q4. Estimated 1st Year Sales ($) ? — 2

Q5. Market landscape? — OP

Q6. Market Acceptance? — 0

Q7. Product value to customer? — P

Marketing Score — 55.00

Planned Start: * 10/02/2008   Expected Finish: * 11/27/2008

Comment Marketing

Comment:

Comment Log:

Add Comment

Save

Decision Points:

PI-000003

Idea Overview

Technical Validation

Marketing Validation

Decision Points

✅ xRPM Item P-00000057 has been Created.

✅ Decision Point was saved

Decision Points

Idea Validation

Decision Point Description:	Idea Validation	Status:	Approved ▼
Planning Start:	09/11/2008	Planning Finish:	09/11/2008
Actual Start:	05/30/2008	Actual Finish:	09/11/2008

☐ Send Workflow Idea Validation

Concept Identification

Decision Point Description:	Concept Identification	Status:	Approved ▼
Planning Start:	09/23/2008	Planning Finish:	09/27/2008
Actual Start:	09/11/2008	Actual Finish:	09/11/2008

☐ Send Workflow Concept Identification

Save

RPM Dashboard:

Discounted Cash Flow - Input:

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DCF

| Current Planning Period: 01/02/2009 | — 01/02/2018 | | Period Breakdown: Anually | | Currency: USD |

Calculate Totals

Category / Category Group Description	Q1 2009	Q2 2009	Q3 2009	Q4 2009	Q1 2010	Q2 2010	Q3 2010	Q4 2010	Y 2009	Y 2010
▼ Revenue Input	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
▪ Average Unit Sales Price	291.00	291.00	291.00	291.00	291.00	291.00	291.00	291.00	291.00	291.00
▪ Estimated Average Discount	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00
▪ Average Unit Price	261.90	261.90	261.90	261.90	261.90	261.90	261.90	261.90	261.90	261.90
▪ Unit Sales Volume	25.00	75.00	75.00	75.00	75.00	80.00	85.00	97.00	250.00	337.00
▶ Cost of Goods Sold Input	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
▶ Operating Expenses Input	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Column 1 of 18

Operating Expenses Detail

Royalties (% of Sales):	0.00	Licensing Fees (% of Sales): 0.00
General & Administrative (% of Sales):	17.40	Advertising & Promotion %:: 5.000
Up Front License Cost:	0.00	

Timeline Display 01/02/2009 — 01/02/2018 **Calculate Totals**

Headcount	Q1 Y2009	Q2 Y2009	Q3 Y2009	Q4 Y2009	Q1 Y2010	Q2 Y2010	Q3 Y2010	Q4 Y2010	Y 2009	Y 2010	Y 2011	Y 2012
RD_Technician	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
RD_Assoc_Sci	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
RD_Sci	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Discounted Cash Flow - Output:

SIGMA-ALDRICH® **SAP**

DCF

Discounted cash flow assuptions

(In Dollars) Incremental Revenues/Costs of Project ==============================>

Category / Category Group	Q1 2009	Q2 2009	Q3 2009	Q4 2009	Q1 2010	Q2 2010	Q3 2010	Q4 2010	Y 2009	Y 2010
▼ Revenue Output	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
• Product Revenue	6,548.00	19,643.00	19,643.00	19,643.00	19,643.00	20,952.00	22,262.00	25,404.00	65,477.00	88,261.00
• Revenue Growth %	0.00	200.00	0.00	0.00	0.00	6.70	6.30	14.10	0.00	34.80
▼ Cost of Goods Sold Output	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
• Product COGS	1,455.00	4,365.00	4,365.00	4,365.00	4,365.00	4,656.00	4,947.00	5,645.00	14,550.00	19,613.00
▶ Gross Margin Output	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
▶ Operating Expenses Output	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
▶ Operating Income Output	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
▶ Net Income Output	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
▶ Net Cash after Tax Output	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
▶ Present Value Of Cash Flow Output	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Column 1 of 18

Sum of Present Value Cash Flows:	165,915.00
Residual Value:	108,296.00
Net Present Value (NPV):	274,213.00
Payback in Today's Dollars (Years):	2.13525444
R&D Hours to make NPV Zero:	3,761.00
IRR:	0.00

Item Overview:

SIGMA-ALDRICH®

| Project Management | **Portfolio Management** | Design Collaboration | R & D Idea Management | Timesheet |

Portfolio Management | Item Management | Resource Management | Reports and Analytics | Substitute | Administration

Portfolio Management | History   Back

◄ View History ►   Hel

Object Information

Biotechnology >
CAROLYN'S IDEA
              ▲ Other Items ▼

Item Overview

Decision Points

Financial Planning

Capacity Planning

Roles

Questionnaires

Reviews

Tasks

Version History

Dependencies

Collaboration Room

Operational Project

DCF

cFolders

Actions

Upload/Download Project Data

Overview

An overview of the item is shown below and to display all sections, click on "Expand All" to the right

[Save]   [Copy to New Item]

General Information

Name: *	CAROLYN'S IDEA	External ID:	P-00000057
Description:		Item Type: *	Biotech -New Product
Bucket Name:	Antibodies		
Status:	Proposal	Proposal:	☐
Area:		Location:	▼ ℹ
Category:	Biotechnology - New Product ▼	Subcategory:	P ▼ ℹ
Group:	▼ ℹ	Probability Commercial Success:	070
Probability Technical Success:	090	Assessed Risk:	090
Risk Icon:	⚠	Budget Status:	🟩
Staffing Status:	🟩	Schedule Status:	🔴
User Name:	COHEARN		

Financial Overview

Currency: *	United States Dollar ▼	Period Breakdown: *	Annually ▼
Launch Cost:	100,000	Development Cost:	1,000
Net Present Value:	15,000,000	Expected Commercial Value:	9,359,000.00
Plan Costs:	0	Plan Cost YTD:	0
Actual Cost:	0	Actual Cost YTD:	0
Total Budget:	0	Annual Budget:	0

I/S Business Drivers:

- Consistent way for gathering I/S requests.
- Ability to separate projects from support.
- Consistent way of measuring business justification.
- Need to track what I/S resources are working on.

- Deliver projects On-time / On-budget.
- Consistent KPI data and reporting for all I/S projects.
- Visibility to project data to increase scheduling accuracy and reduce cycle times.

Before

- Manual processes
- No time tracking
- Little/no visibility to resource availability

Request for Approval → Initiation & Planning → Execution & Control → Close Out

◆ = Gate Approval

Microsoft Excel

WebEx

LiveLink

Microsoft Word

Microsoft Project

Email

SAP Project Financials

SAP Solution Manager
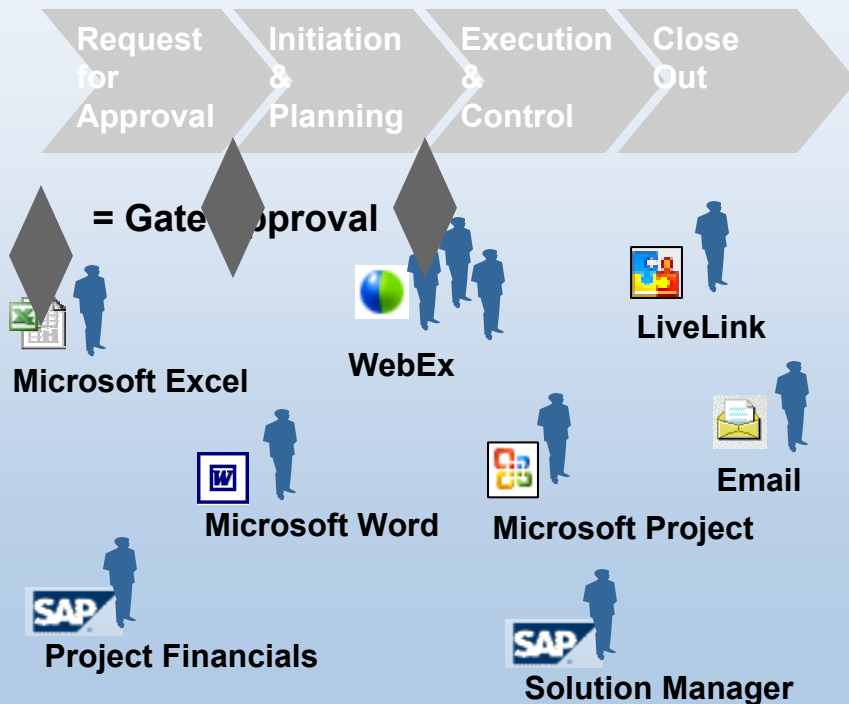
Request for Approval
- Opportunity Identified
- Business Justification
- Weekly PMO/Business & Finance Review meetings
- Project Charter created/submitted

Initiation:
- Business Case Developed
- Project Plan Developed
- Capital Expenditure Request Created
- Project Prioritized and Scheduled

Execution & Control:
- Project Plan Maintained
- Change Management
- Issues Log
- Status Updates
- On-time / On-budget measurements

Close Out:
- Contractor Closeout
- Financial Closeout
- Project Team Feedback
- Closeout Documentation
- Lessons Learned
- Handoff to Service Desk

I/S Solution:

I/S Implementation:

- Visibility to Projects
- Standardized Project Processes & Templates

- Time reporting – project & non project work
- KPIs/Dashboard Indicators

- Visibility to resource availability
- Common Repository for Project Documentation

After

Request for Approval

Still manual process.

Projects Approved at Gate 1 are manually entered into RPM as project.

SAP RPM	SAP cFolders	SAP cProjects	Web Dynpro
Resource Mgmt.	*Document Mgmt.*	*Project Mgmt.*	*Time Reporting*

Change Request created for Project work in Solution Manager.

SAP Solution Manager
Change Mgmt

SAP BW
Reporting
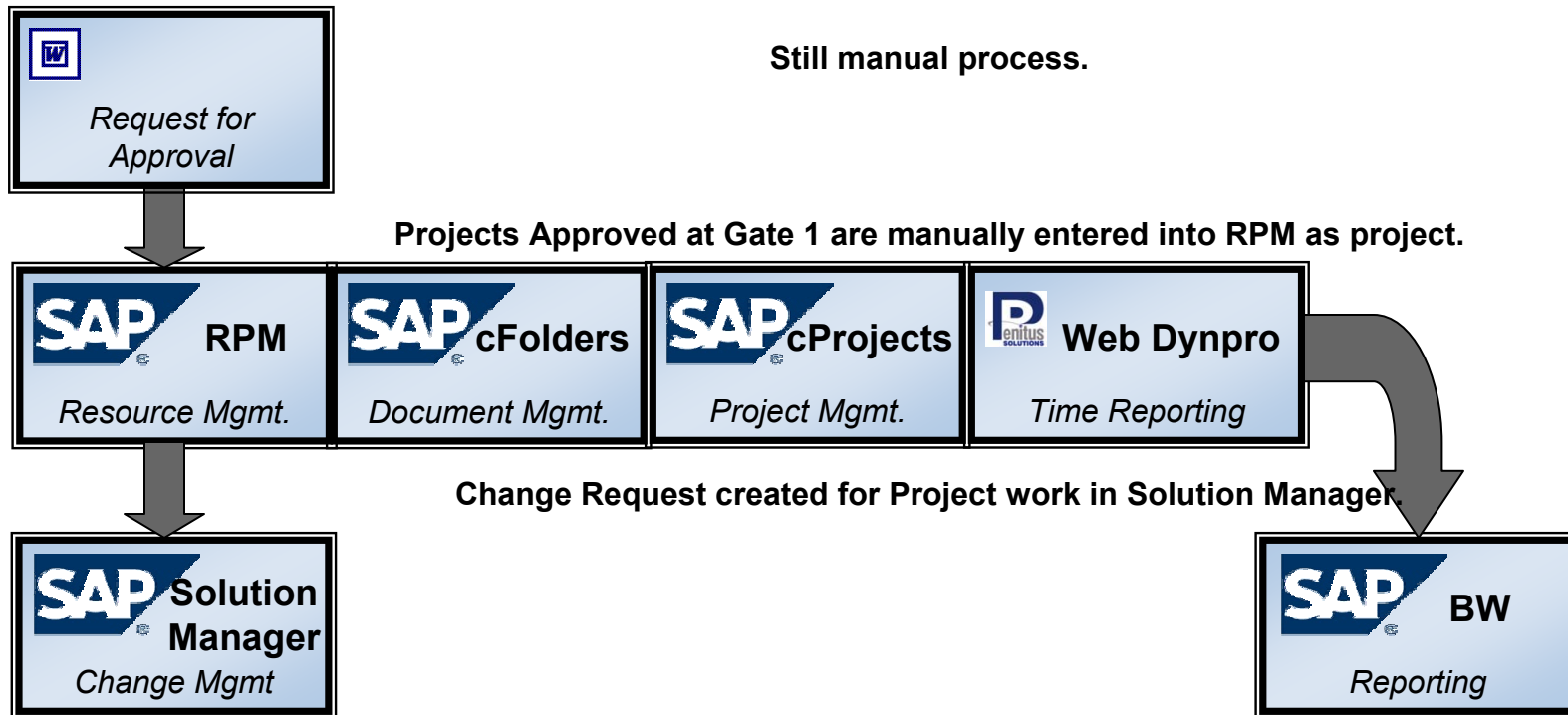
Allows I/S to track true cost of projects & measure on-time / on-budget.

Custom Field Lookups:

Real-time lookup in Solution Manager

Additional Information

xPD Ref Number:	
Project Manager:	
System:	000000000000000000
BRMB:	
Business Unit:	

Search System

Done Cancel

Within: System   Based on: SolMan System   Number of Hits: 100

Installed Base: IBase component:
Component Description:

Search   Show All Results   Reset

Search Results

Name	IBase component
SOLMAN DEMO Landscape/solution	000000000000003370
SAP Systems	000000000000003372
SAP SOLUTION MANAGER	000000000000003374

Solution Manager Integration:

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| Project Management | Portfolio Management | Content Administration | User Administration | System Administration | R & D Idea Management | Design Collaboration | IS Re |

Portfolio Management | Item Management | Resource Management | Reports and Analytics | Substitute | Administration

Portfolio Management | History Back

◄ |▶|

◄ View History ▶   Hel

Object Information

Global IS > IS >
IS Project
▲ Other Items ▼

Item Overview

Decision Points

Financial Planning

Capacity Planning

Roles

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Dependencies

Decision Points

Below are the decision points for this item. The current decision point is indicated in parentheses. To display all decision point details, click on "Expan
the right

ℹ Change Request Sigma 0008001003 was created in Solution Manager.

ℹ No changes were made. Data is not saved

Save

View Schedule Chart | Revert to Previous Decision Point

▶ Request for Approval

▶ Project Initiation

▼ Project Execution and control (Current Decision Point)

Decision Point Name: *	Project Execution and control	Status:	In Work/Testing ▼
Planned Start Date:		Planned Finish Date:	
Actual Start Date:		Actual Finish Date:	

▶ Project Close Out

Solution Manager Integration:

Implementation Challenges:

Biotech:

- New xApps technology and system landscape:
    - Basis/SAP NetWeaver expertise in xApps technology.
- Undefined portal strategy (WebSphere and SAP).
- All sites/locations not currently up and running on SAP/HR – inability for CATS integration:
    - Time reporting – need for customized solution.
    - Qualifications Requirements.
- Unclear definition of project roles at beginning of project (internal vs. external).

I/S:

- Current versions of SAP & RPM did not support multiple Internal Order creation.
- Areas within the Project Management process were still being finalized during requirements gathering.
- Change management – scope changed, rollout audience expanded.
- Integration with Solution Manager – creation of Change Request for project work.
- System open to I/S only – not extended to business as of yet.

Why Did it Work?

Biotech:

- Proof of Concept to better understand requirements and ensure the proper tool set.
- Selecting the right project manager (Internal and External).
- Selecting the right implementation partner who understands the processes, business & toolset.
- Strong involvement from the business.
- Strong training team and training plan.
- Process engineering completed prior to system engineering.
- Change management.

I/S:

- Strong involvement from the various groups providing process input – business, finance...
- Support from the top.

What's Next:

Biotech:

- Streamline Ideation Functionality to Minimize I/S Involvement to Support Future Business Process Changes.
    - User-defined workflow to determine order of evaluation.
- Support for Critical Chain Management.
- Evaluate Server Configuration/Make Necessary Adjustments to Optimize Performance, especially on the European Network.

I/S:

- Implement Online Request Process – Submission and Approvals.
- Request Process to Include Different Flows/Approval Process for Support vs. Project Work.
    - Change request created for support work in Solution Manager.
- Business Case to feed Scoring Model (form to vary based upon type of request).
- Additional Workflow Capabilities.
- Further integration with Solution Manager with cProjects – tie tasks in Solution Manager to tasks in cProjects.

Other:

- Expand rollout of Resource and Portfolio Management to the rest of the corporation.

Penitus Add-on Solutions

Penitus Add-on Solutions

Working together with our customers, Penitus recognized the need to deliver specific, high-value additions to their deployments. This has resulted in the following add-on composite application solutions:

Penitus Financial Planning & Budgeting Integration^{TM}

Penitus Issues Management & Dashboard^{TM}

Penitus Project Change Management & Dashboard^{TM}

Penitus RPM and PS Integration Accelerator

Penitus Financial Planning & Budgeting Integration™

- Penitus Financial Planning Integration™ bi-directionally integrates a three dimension Fiscal Year planning for Funds or Investments (Budget, Cost Centers / fund center, Commitment items / cost elements) into R/3 via stage process.

- The application provides all the functionality a project manager needs to do financial planning in RPM and eliminates the need for duplicate data entry in R/3 when creating budgets.

- Penitus Financial Planning Integration™ also provides a tool that will automatically create RPM Portfolio structure from the R/3 functional area group hierarchy / Investment Management structure .

Penitus Financial Planning Integration

✓ Key Features
- Create Portfolio into RPM directly from R/3
- Fiscal Year Planning
- Phase Gate Budget approval
- What-If scenarios evaluation for Budget Portfolio
- Creates Real Time Budget from RPM to R/3
- Integrated with SAP BW
- Forecast, Planning and Actual Cost tracked from RPM

✓ Benefits
- Automate Financial Planning process for entire Budget Portfolio
- Effectively Track Financial Planning approval process
- Optimize Financial Planning by reducing risk on Budget Portfolio evaluation
- Improve visibility of entire Budget Portfolio planning
- Enable multi-program/project planning from different source of Budget

Example of Financial Planning Integration
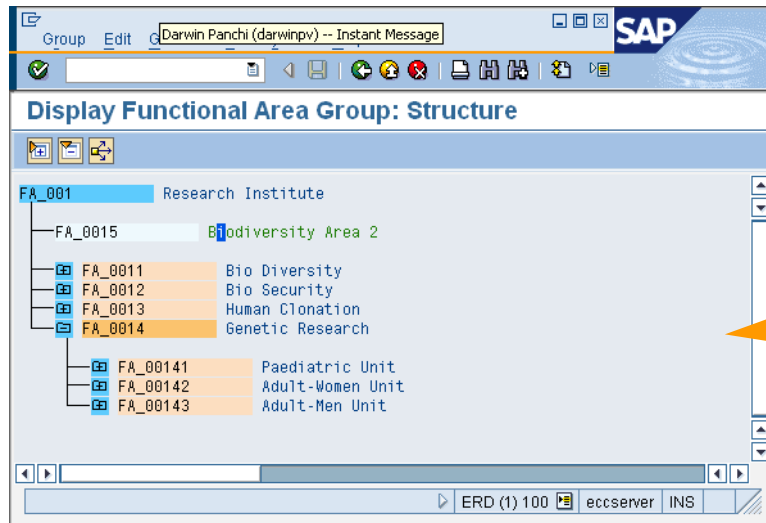
Penitus has developed a program in R/3 that will use the functional area group hierarchy in FM to create a real timeRPM portfolio and bucket structure.

Create Portfolio into RPM directly from FM

Portfolio Structure

Below is the structure for managing your portfolio items. Each bucket level can contain either sub-buckets or items.

	Structure	Bucket Name	External ID	Status	Date Created	Last Update
	▶ 🗀	Bio Diversity	FA_0011	Active	4/29/2007	4/29/2007
	▶ 🗀	Bio Security	FA_0012	Active	4/29/2007	4/29/2007
	▪ 🗀	Biodiversity Area 2	FA_0015	Active	7/16/2007	7/16/2007
	▶ 🗀	Genetic Research	FA_0014	Active	4/29/2007	4/29/2007
	▶ 🗀	Human Clonation	FA_0013	Active	4/29/2007	4/29/2007

Row 1 of 5

Example of Financial Planning Integration

Fiscal Year Planning – Set Budget Information

This tab in RPM lets users set the master data information needed for FM Budget Transactions.

Fiscal Year Planning – Budget Planning

Penitus Financial planning Integration uses a three dimension fiscal year planning window (Funds, Fund Centers and Commitment Items) to gather information that will be used to create FM budgets.

Example of Financial Planning Integration

SAP

Create Real Time Budget from RPM to FM – Set Budget Information

Budget documents are logged once approved via stage gate (decision points).

	Set Budget Information	Budget Planning	Budget Doc Log

The process of budget creating in Funds Management generate the following results

In the process of budget approval errors existed. These errors are showded in the following table. The docum___ were

	Number	Message ID	Message Number	Message Type	Message
	0000	BAPI	000	S	BudgetEntryDocFM 000120070000000051 has been created. External reference:

Create Real Time Budget from RPM to FM – Budget Document in FM

Header	Additional Data

Document	51	Status	Posted	Document Year	2007	FM Area
Process	Enter	Total	5,400.00	USD		
Budget Category	Payment	Version	0	Fiscal Year	2007	
Document type	BG	Document Date	06/29/2007			

Budget data can be verified in FM by displaying budget document created in RPM.

Year	Periods

Line	Value Type	Fund	Funds Center	Commitment item	Functional Area	Funded Program	Type	Amount (USD)	DK	Text
000001	Budget	201	11_02	630050	FA_00111	X-00000255	BUDO	1,550.00	0	
000002	Budget	201	11_02	651000	FA_00111	X-00000255	BUDO	700.00	0	
000003	Budget	201	121_01	610030	FA_00111	X-00000255	BUDO	1,100.00	0	
000004	Budget	201	121_01	610080	FA_00111	X-00000255	BUDO	2,050.00	0	
000005	Release	201	11_02	630050	FA_00111	X-00000255	REL	1,550.00	0	Line created
000006	Release	201	11_02	651000	FA_00111	X-00000255	REL	700.00	0	Line created
000007	Release	201	121_01	610030	FA_00111	X-00000255	REL	1,100.00	0	Line created
000008	Release	201	121_01	610080	FA_00111	X-00000255	REL	2,050.00	0	Line created

Example of Financial Planning Integration

Funds Management Integrated with SAP BW

Funds Management Reports easily accessible from RPM using SAP Business Warehouse (BW).

Project Management	**Portfolio Management**	Design Collaboration	Content Administration	User Administration

Portfolio Management | Item Management | Resource Management | **Reports and Analytics** | Substitute |

Budget

Detailed Navigation

- ▶ ☐ Cost Analysis
- ▶ ☐ Financial Planning
- ▶ ☐ Capacity Management
- ▶ ☐ Capacity Planning
- ▶ ☐ Maximum Value
- ▶ ☐ Balance Portfolio
- ▶ ☐ Strategic Alignment
- ▶ ☐ Versioning
- ▼ ☐ Funds Management
  - Released Objects
  - Payment Budget Overview
  - Commitments and Actual
  - Budget Version Comparison
  - Budget Usage of Cover Groups
  - Budget Overview According to '
  - **Budget**
  - Assigned Funds (Releases)
  - Assigned Funds (All Ledger)
  - Assigned Funds

Portal Favorites

ℹ There are no items to display

| Exceptions and Conditions | Comments | Export to CSV |

Budget Type	Fund	Fu... ...gram	Functional area	Funds Center	Commitment item	Current Budget	Original Budget
0001/B1/BT01		#	#	11_01	10110	$ -2.300,00	$ -2.300,00
				11_02	204411	$ -300,00	$ -300,00
0001/B1/BUDO	150	X-00000174	FA_00121	1020	610100	$ -2.000,00	$ -2.000,00
	200	X-00000126	FA_001411	121_02	610030	$ -4.000,00	$ -4.000,00
					610040	$ -4.000,00	$ -4.000,00
					610080	$ -10.000,00	$ -10.000,00
					630050	$ -11.000,00	$ -11.000,00
		X-00000175	FA_001411	11_02	610030	$ -5.000,00	$ -5.000,00
					610100	$ -1.500,00	$ -1.500,00
		X-00000178	FA_001411	31_01	664000	$ -15.000,00	$ -15.000,00
	201	X-00000175	FA_001411	121_01	610060	$ -1.100,00	$ -1.100,00
	202	X-00000126	FA_001411	121_02	611000	$ -16.000,00	$ -16.000,00
				31_01	630050	$ -15.000,00	$ -15.000,00
					630060	$ -2.000,00	$ -2.000,00
					664000	$ -15.000,00	$ -15.000,00
		X-00000184	FA_00121	11_03	610060	$ -1.400,00	$ -1.400,00
					611000	$ -2.000,00	$ -2.000,00
				121_01	610101	$ -8.000,00	$ -8.000,00
		X-00000185	FA_00121	11_03	610030	$ -1.400,00	$ -1.400,00
					611000	$ -5.000,00	$ -5.000,00
				121_01	610101	$ -8.000,00	$ -8.000,00
	203	X-00000126	FA_001411	11_02	651000	$ -500,00	$ -500,00
				121_02	610102	$ -5.000,00	$ -5.000,00
					611000	$ -32.000,00	$ -32.000,00

Penitus Issues Management & Dashboard™

- Penitus Issues Management & Dashboard™ provides Project Managers a tool to log and track project related issues.
- The Dashboard provides real-time visibility of all issues for project executives to help proactively identify and circumvent bottlenecks, slowdowns, and other via SAP Portal.
- A Priority 1 tab is provided to alert users of issues that have reached critical status.

Penitus Issues Management & Dashboard

✓ Key Features

- Issues Log
    - Issues data entry options integrated into the RPM Item menu
    - Issues data entry screen consistent with standard RPM

- Issues Dashboard
    - Visibility to issues across multiple projects with expand and collapse functionality
    - Summary project level indicator visible in collapsed mode that is set based on a defined threshold of number and criticality of issues
    - Priority 1 tab to isolate most critical issues

- Integrated with BW

Penitus Issues Dashboard for SAP RPM

Issue Overview Data Entry Screen

Penitus Issues Management & Dashboard

Issues Dashboard integrated with RPM/cProjects

Penitus RPM and PS Integration Accelerator

Penitus RPM and PS Integration Accelerator enhances the standard SAP provided integration with a more tightly integrated RPM / PS solution.

Penitus RPM and PS Integration Accelerator

SAP

- ✓ Key Features
- Gate control for project download to PS
  - The RPM item provides the decision point mechanism for project stage gate approval. The Penitus Integration Accelerator only allows the download process to be executed when the project gains approval to become operational at a selected decision point.
- Download Enhancement
  - Filter project template selection to PS projects within a certain number range
  - Download complete PS project template structure
    - **Project Definition**   **-- WBS Elements**
    - **WBS Elements**   **-- Network**
    - **Activity / Activity Element**   **-- Milestones**
  - Update RPM/cProject number with PS project number
- Real-time upload of PS project data to RPM
  - PS project structure uploaded to cProject (automation of the standard RPM PS upload functionality)
  - Work Centers / Plant planned on PS activities are uploaded real-time into RPM/cProject as roles with the planned demand (sum of Work estimated on each activity / activity element)

Penitus RPM and PS Integration Accelerator

✓ Key Features

- Real-time upload of PS project data to RPM (Continued…)
    - Real-time schedule / planned cost updates from PS to RPM dashboard
    - Dashboard updates of project actual costs / Revenue via standard RPM ALE
- Resource allocation from RPM to PS activities via ECC Workforce Planning
    - Resources are staffed via standard RPM staffing screens (by role) and are allocated to PS activities / activity elements using workforce planning engine of ECC
    - Portal Time Reporting via Employee Self Service (ESS) / Cross Application Timesheet (CATS) using Work List

✓Benefits

- Improved governance – streamlined proposal approval to project initiation
- Sophisticated multi-project/portfolio monitoring (dashboards) and analytics (enhanced balanced scorecard)
- Consolidation of structured data from ERP, Schedule + unstructured data and collaboration (internal/subcontractors)

Questions?