How to extend SAP PPM to enable Dashboard Analytics for optimal decision support

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- Approach for making informed decisions about project selection
- Methods of periodically evaluating project performance
- Design of integrated launch pad for PPM Analytics
What is Portfolio and Project Management?

**Portfolio Management**

- Full 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

**Doing the right things!**

- Strategy & Alignment
- Innovation
- Idea Generation
- Visibility
- Ability to make Decision
What is Portfolio and Project Management?

**Project Management**

- Managing scope, timeline and budget of projects in an integrated way
- Define the resource demand and search for suitable resources (e.g. based on qualification)
- Track and monitor the execution of your projects
- Collaborate with project team members
- Plan your detailed project costs

**Doing the things right!**

- Scope & Timeline
- Communication
- Project Execution
- Resource Management
- Project Costs

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Objective: Enhanced portfolio decisions and project execution, align project portfolio to support growth and strategy

- Best practice solution: Integrated portfolio and project management to help assess investment opportunities regarding risk and priorities and govern the execution of the projects
Objective: Efficient delivery of high quality projects in time, budget and scope

- Best practice solution: Execute the project in a consistent way that can ensure that expectations for quality, timeliness and costs are met, or even exceeded.
Objective: Effectively allocate resources to projects

- Best practice solution: Help drive optimization of the talent supply chain through superior planning, execution and alignment of demand with supply
Project Selection Process

Idea / Proj. Owner

Create PPM Item

Supervisor / Manager Review

Supv / Manager

Scoring Decision

Idea / Proj. Owner

PAT

Final Decision

Idea / Proj. Owner

PAT

Funding Decision

Idea / Proj. Owner

BAC

PAT = Project Acceptance Team
BAC = Budget Approval Committee

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Example of Bucket Structure

Portfolio

Bucket

Gasoline

Diesel

Hybrid

Bucket

Cars

Motorbikes

Pick-ups

Trucks

Hover bike

Items

Model 1

Projects:
- Better Fuel Economy
- Less Weight
- Longevity
- Service and Maintenance
### Launchpad Application (ABAP)

<table>
<thead>
<tr>
<th>Cost Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Actual vs Planned Cost by Portfolio Item</strong></td>
</tr>
<tr>
<td><strong>Details Actual Cost by Portfolio Item</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Financial Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bucket Financial Planning by Timeline</strong></td>
</tr>
<tr>
<td><strong>Item Financial Planning by Timeline</strong></td>
</tr>
<tr>
<td><strong>Financial Planning of Selected Bucket vs. Items Below</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Capacity Management</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Availability vs. Allocation</strong></td>
</tr>
<tr>
<td><strong>Availability/Assignment of Resources</strong></td>
</tr>
<tr>
<td><strong>Demand vs Allocation</strong></td>
</tr>
<tr>
<td><strong>Demand, Allocation and Availability</strong></td>
</tr>
<tr>
<td><strong>Demand, Allocation and Availability by Months</strong></td>
</tr>
<tr>
<td><strong>Hard-booked/Soft-booked Allocation vs. Demand</strong></td>
</tr>
<tr>
<td><strong>Resource Allocation and Availability for Selected Portfolio Item</strong></td>
</tr>
</tbody>
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</tr>
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</tr>
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<table>
<thead>
<tr>
<th>Maximum Value</th>
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</thead>
<tbody>
<tr>
<td><strong>Expected Commercial Value - Chart/Table</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Balance Portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Risk reward diagram</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategic Alignment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accumulated expected Value for launch - portfolio</strong></td>
</tr>
<tr>
<td><strong>Development Cost Distribution</strong></td>
</tr>
<tr>
<td><strong>Portfolio item costs vs. risk</strong></td>
</tr>
<tr>
<td><strong>Portfolio items in Development</strong></td>
</tr>
<tr>
<td><strong>Spending levels</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Version Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Baseline Reporting of Item Versions</strong></td>
</tr>
<tr>
<td><strong>Item Versions in a Portfolio/Bucket</strong></td>
</tr>
<tr>
<td><strong>Portfolio Item Trend Analysis</strong></td>
</tr>
<tr>
<td><strong>Item Capacity Planning: Version Comparison</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item Dependency Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>List of Predecessor Items</strong></td>
</tr>
<tr>
<td><strong>List of Successor Items</strong></td>
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</tbody>
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Assigned Work and Assigned Effort
- Task Assignments and Role Staffing - Dashboard
- Task Assignments/Role Staffing Details - Dashboard
- Assignment of Tasks and Role Assignment
- Role Staffing
- Task Assignments of Roles

Actual / Planned: Work, Demand and Dates
- Actual / Planned / Status: Task Comparison
- Program Hierarchy: Dates and Demand
- Project Dates and Demand
- Work/Demand and Confirmation

Costs from ERP
- Internal Orders (Created in Project Management): Budget/Actual/Commitment
- Internal Orders (Created in Project Management): Planned/Actual
- Internal Orders (Created in Project Management): Overall Planned/Actual/Commitment
- Projects (Created from Project Management): Planned/Actual
- Replication: Planned / Actual

Dates, Work, Assignments, Role Staffing
- Utilization of Roles
- Versions with Key Figures

Infoset: Documents
- Assignment of Documents

Work of Role Assignments and Tasks in Project Portfolio
- Work of Role Assignments and Tasks in Project Portfolio
What is missing

- Ad hoc reporting
- Attractive charts
- What-if analysis
- Integrated reporting solution
Build Custom Reports to help:

- Slice and dice as per business requirements
- Create data-marts for effective and efficient reporting
- Enhance/utilize standard content with enterprise specific layout
Choice of tools for reporting and analytics.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Feature</th>
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<tbody>
<tr>
<td>Web Intelligence</td>
<td>Intuitive interface and visualization functionality for regular and ad-hoc reporting.</td>
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<tr>
<td>Crystal Reports</td>
<td>Pixel precise and scalable enterprise reporting with powerful data mash-ups.</td>
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<tr>
<td>Analysis</td>
<td>Highly interactive multidimensional and self-service analysis.</td>
</tr>
<tr>
<td>Explorer</td>
<td>Predefined user interface offering ease of analysis with very large data sets.</td>
</tr>
<tr>
<td>Dashboards</td>
<td>Single window to provide at-a-glance views of KPIs with flexible design</td>
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</table>
- Self-service access to data
- Highly intuitive interface and visualization functionality
- Reduce IT department workload with powerful online and offline ad-hoc queries
- Accurate and collaborative quality decision making rather than taking decisions based on experience, accumulated knowledge, rule of thumb, decision traps or biases in judgment
- Analyze data and identify trends – help end-users turn business insights into effective decisions
- Formatted and scalable enterprise reporting
- Reports from Virtually Any Data Source
- Develops powerful data mash-ups
- Saves valuable report design time

Do become familiar with conditional formatting, especially the conditional formatting of sections.

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SAP BusinessObjects Analysis

- SBO Analysis describes a new product line of analysis clients that are streamlined for highly interactive multidimensional and self-service analysis
- SBO Analysis, edition for Microsoft Office - a premium alternative to the Excel analyzer tool of the SAP BEx suite (SAP BEx Analyzer)
- SBO Analysis, edition for OLAP - a premium alternative to the Web analyzer tool of the SAP Business Explorer suite (SAP BEx Web analyzer)

“Voyager” → “Pioneer” → “Advanced Analysis” → “Analysis”
SAP BusinessObjects Explorer is a data discovery application that helps you identify trends in your data and to quickly retrieve answers to your business questions.
- Single window to provide at-a-glance views of KPIs relevant to a particular business process or industry (example: Sales, Marketing and Human Resources)
- KPI driven
- Visually attractive
- Supports analysis
- Facilitates action
Financial Planning Scenario

- How much funds do I have on Buckets by year?
- How much funds do I have on items by month?
- How much cost do I have on items by year?
- How to reduce cycle time during decision points?
- How to run what-if scenarios on projects?
- What are my top priority Projects for a certain year?
- How to launch exception reports from a single interface?
- How to budget and track projects based on all data?

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Understanding KPI Ecosystem

- Current State
  - Where you are today?

- Trend
  - How you got there?

- Forecast
  - Where you’ll be at your current rate?

- What-if
  - What you need to do to meet your targets?

Successful Analysis

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SBO Dashboard can serve the purpose of one-stop shop for all enterprise analytics through variety of components and jump report functionality.

Covers:
- What-if
- Trending
- Forecasting
- Snapshots
- Exception Reports
Financial Planning – Data Model

- Financial Planning Dashboard
- Standard BI Content Report
- Portfolio Report
- Cut Line Report

(BICS: Business Intelligence Consumer Services)

- Financial Planning InfoCube: 0RPM_C05
- Financial Planning Multiprovider: (Custom)

- Bucket DSO: 0RPM_DS08
- Item DSO: 0RPM_DS07

- Bucket: 0RPM_BUCKET_FIN_PLANNING
- Item: 0RPM_ITEM_FIN_PLANNING

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Standard Reports
• BI Content Reports

Custom Reports
• Cutline Report
• Portfolio Report

Dashboard
• PPM Financial Planning Dashboard

Ad-hoc Analysis
• User defined reports and views
Dashboard Demo
User Alignment for Every Business Role

Professionally Informed
- Executives
- Managers
- Business Analysts

Technically Capable
- CxO
- Senior Managers
- Managers
- Everyone

Strategic Dashboard
- Vision & Mission KPI

Analytical Dashboard
- Product Performance Analysis

Operational Dashboard
- Assembly Line Monitoring

Informational Dashboard
- Statutory Reports

Data Granularity
- Summarized
- Detailed

Mobile
- Tablets, Smart Phones, Laptops and Desktops

Static
- Tablets, Smart Phones, Laptops and Desktops

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Launch Options

- Portal
  - iView on SAP Enterprise Portal
  - iView on SAP PPM Portal
- SAP BusinessObjects
  - BI Launch Pad
- Integrated
  - BI Launch Pad + Portal iView
PPM Mobile Scenario

Analytics on Mobile
- Organizational Health
- Projects Prioritization and Tracking

PPM
- Successful execution of projects

Enterprise
- Informed and intelligent decisions from anywhere
- Ideas shaping the future

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• Careful and pragmatic design of PPM bucket structure to support reporting and system performance
• Better and earlier engagement of end users in report development using production data to prototype new reports or enhancements to existing reports enables stronger adoption
• Integrate reporting solutions
• User alignment according to business roles
• Select appropriate BI tool and leverage available BI Content for reporting needs
• Emphasis should be on the data – in addition to the reports
• Develop reporting networks – investment in future
• Plan to invest in some form of mobility for the enterprise
THANK YOU FOR PARTICIPATING

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