




SAP EPPM Portfolio Prioritization Engine



A Unique Partner for an Innovative End-to End EPPM Strategy in the Cloud and On-Premise

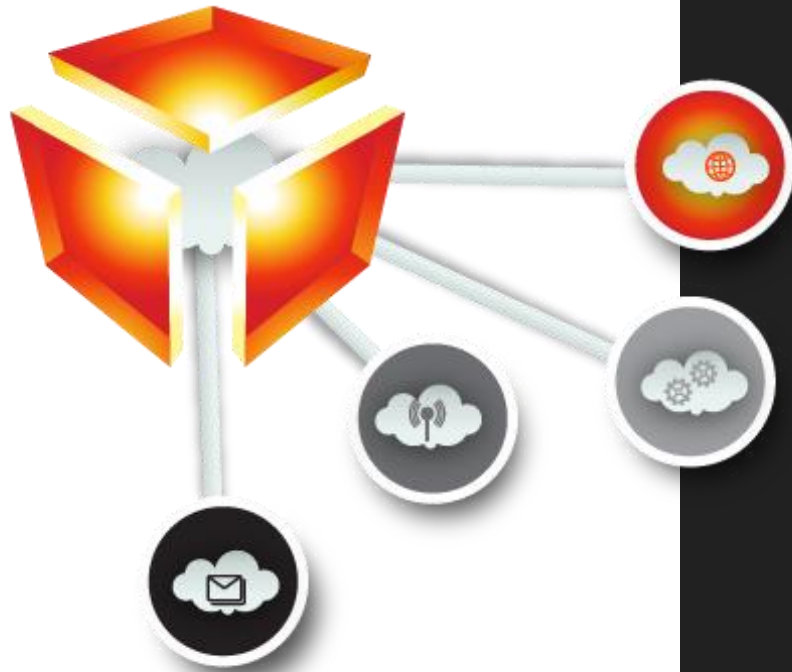


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President
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Agenda

- How Does the SAP BTP Portfolio EPPM Portfolio Prioritization Engine Benefit your Organization
- Process Overview
- Solution Demonstration



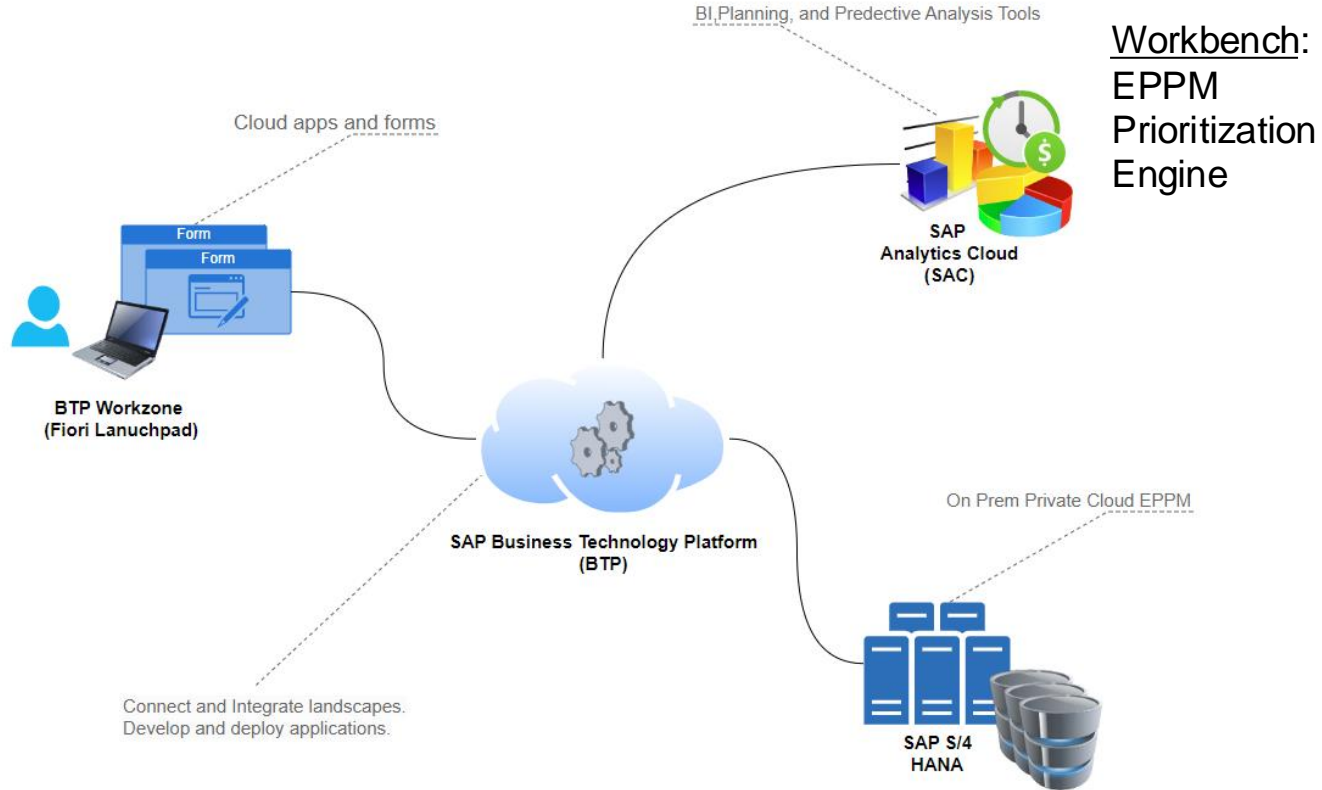


How Does the EPPM Portfolio Prioritization Engine Benefit your Organization?

- Prioritization engine is driven by Flexible BTP Survey application
- BTP Survey App offers easy to use scoring models
- No configuration involved
- Multiple users can participate in the survey process
- Prioritization engine integrated into SAC budgeting process



Solution Overview



Survey/Questionnaire Maintenance



1

1. The EPPM Survey App is one of the key ingredients of the prioritization process.
2. Questionnaire template wizard that can be managed by a user via the BTP app.
3. Questions, Answers and associated scoring weights can be assigned.
4. Once defined, the templates can be assigned to an Idea, Item, or Capital Project.

1. The template wizard can be enhanced to make the default template selection dynamic based on key attributes

PLATINUMDB Maintain Survey Search In: "Apps"

Manage Surveys

Standard ▼

Status: Name: Start Date:

Survey (6) Standard* ▼

Name	Description	Status	Currently Active
<input type="radio"/> Risk Scoring template	Risk Scoring template	Released	Yes

Survey Object Page

Risk Scoring template Released Duration 176 days Active Expires in 175 days Weight Distribution Question Branching Help

Survey Questions Linked Objects Participants Analytics

Survey

Name: Risk Scoring template 3 Attribute 1: - Created By: vinayak@platinumdb.com
 Description: Risk Scoring template Attribute 2: - Created On: Jul 6, 2024, 8:27:40 PM
 Start Date: Jul 8, 2024 Attribute 3: - Changed By: tderosa@platinum-db.com
 End Date: Dec 31, 2024 Attribute 4: - Changed On: Jul 7, 2024, 5:34:09 PM
 Linked Object Type: Idea Attribute 5: -

QUESTIONS

Questions (3) Standard ▼ Weight Distribution Question Branching Help

Sort	Question	Category
<input type="radio"/>	1 Environmental Impact	Section 1
<input type="radio"/>	2 Reliability Impact	Section 2
<input checked="" type="radio"/>	3 Safety Impact	Section 3

Type: Dropdown
Length: 100
Decimals:

Sort	Possible Answer	Weight
<input type="radio"/>	1 Severe	70
<input type="radio"/>	2 Medium	20
<input type="radio"/>	3 Low	10

2

Portfolio Workbench

1. Portfolio Workbench

1. Central cockpit to drive key financial processes
2. Mass update events such as month end, forecast snapshots at the portfolio level
3. Options to import/export data to S/4

The screenshot shows the SAP Business Admin Portfolio Workbench interface. At the top, there is a navigation bar with 'Business Admin' and 'Business Admin Tasks'. Below this, there are four main sections: 'Load Data', 'Annual Planning', 'Month End', and 'Export Data'. Each section contains a play button icon and a description of the action. The 'Annual Planning' section is highlighted with an orange header.

INSTRUCTIONS

- 1) Please use this Story to perform monthly or annual planning activities
- 2) 'Load Data' section summarizes Planning logics available in the system that can be triggered separately to import data and attributes of projects and initialize budgets.
- 3) Use the 'Annual Planning' section to perform steps related to the annual planning process
- 4) Use the 'Month End' section to initiate specific month end processes and monthly snapshot utilities
- 5) Use the Long Term Plan utility to create long term plan snapshots

Load Data

▶ Import Data from S/4HANA

Trigger the integration to import Actuals, Plan and Commitments from SAP S/4HANA

Annual Planning

Start Annual Planning Process to include candidate projects for the year's budget cycle

Projects Prioritization

Select Candidate Projects

Update Annual Plan

▶ Lock Annual Plan
Lock Annual Plan for selected budget year

Submit for Budget Approval

Create AFES

▶ Unlock Annual Plan
Unlock Annual Plan for selected budget year

Month End

▶ Initiate Month End

Close Current month and Generate Rolling Forecast

▶ Monthly Forecast Snapshot

Create forecast Snapshots for the month being closed

Export Data

Export Data

Opens the Data Management of the Data Model in a new tab to start the export job which exports the Approved Budget (Project) data to SAP S/4HANA

Long Term Plan

▶ Long Term Plan

Create a long term plan snapshot. Choose relevant source version for the snapshot creation

Ranking

1. Auto Ranking Feature
 1. Ability to embed different Ranking drivers and algorithms to rank projects for prioritization.
 2. Manually overwrite system generated ranks using drag/drop

The screenshot displays the PLATINUM DB Capital Project Prioritization interface. At the top, there is a search bar with the text "Search in: 'Apps'" and a magnifying glass icon. Below the search bar, there are two sections: "Projects (5)" and "Projects (5)".

The "Projects (5)" section shows a table with the following columns: Rank, Project, Name, Idea, Asset Type, Status, Priority, Benefits, Budgetary Estimate, and Risk Score. The table contains five rows of project data.

The "Projects (5)" section also includes a "Help" popup with the following text:

Help

Prioritization can be done automatically or manually using drag/drop. Once complete, data must be saved to retain the result.

Auto ranking is calculated by using the following weighted average formula where the highest value will have rank of 1:

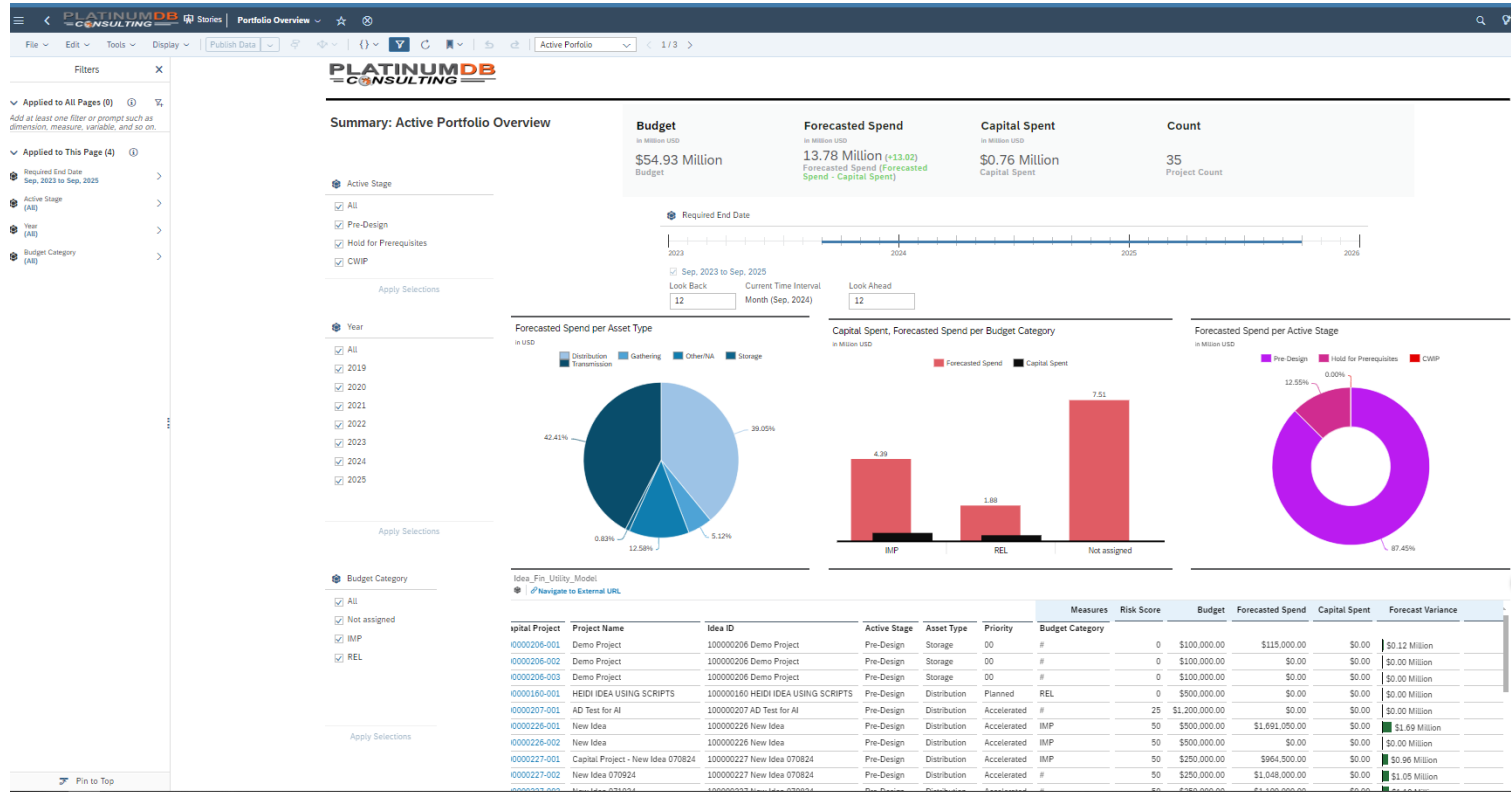
$$((3 - \text{Priority}) * 4) + (\text{Benefits} * 3) + ((100 - \text{Risk Score}) * 2) + (\text{Max Cost} - \text{Budgetary Estimate})$$

A "Success" message is displayed at the bottom of the interface, stating: "Auto rank complete. If we want to retain the ranking please make sure to save the data." with an "OK" button.

Rank	Project	Name	Idea	Asset Type	Status	Priority	Benefits	Budgetary Estimate	Risk Score
1	100000231-010	Delek Demo Idea - 071224	100000231	Distribution	In Progress	Accelerated	\$250,000,000.00	\$3,000,000.00	15
2	100000232-001	84 Tank Replacement	100000232	Storage	In Progress	Accelerated	\$3,500,000.00	\$2,000,000.00	5
3	100000233-001	Can Pump Replacement - Project 1	100000233	Storage	In Progress	Accelerated	\$2,000,000.00	\$1,250,000.00	3
4	P004000299	Idea to test the Checkl Script 3/30/21	100000175	Storage	In Progress	Priority	\$0.00	\$400,000.00	1
5	100000233-002	Can Pump Replacement - Project 2	100000233	Storage	In Progress	Accelerated	\$0.00	\$800,000.00	3

Integrate Scoring Results into SAC Portfolio Analytics

- Portfolio View with drill downs to SAP transactions and Apps
- Integrate survey results into SAC Analytics



Thank you!



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