

# PPM-Aufgabenbearbeitung (Termine) (EN)



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Requirements

# PPM-Task processing

This App runs on systems with at least SAP Portfolio and Project Management 6.1 (PPM 6.1) or SAP Portfolio and Project Management 1.0 for S/4 HANA (EPPM 1.0). There is at least one task below the project phases.

# PPM-Task Editing

This app lists the project tasks assigned to the project and enables their basic data maintenance. It is also possible to assign relationships.

The screenshot displays the 'Tasks Basic Data' step of a 7-step process. The navigation bar includes: 1. Load Project, 2. **Tasks Basic Data**, 3. Tasks Dates, 4. Tasks Relationships, 5. Tasks Relationships Details, 6. Save Project, and 7. Finished. Below the navigation bar are 'Back' and 'Next' buttons. The main content area shows a filter for 'Prototyp 1 VR: 25.06.2014-25.06.2014' and a table of tasks.

Task	Superior element	Status	Sort Number	Date period	Work	Work Unit	Action
Test Kontierung	Test Phase	<input type="checkbox"/>	00010	25.06.2014-25.06.2014	0,00	Hour	<input type="checkbox"/>
Test Aufgabe 2	Test Phase	<input type="checkbox"/>	00020	00.00.0000-25.06.2014	0,00	Hour	<input type="checkbox"/>

# Basic data management

By clicking on the action menu and selecting the "Edit task" function, the basic data can be maintained and changed.

The screenshot shows the 'Tasks Basic Data' application window. At the top, there is a navigation bar with steps 1 through 7: Load Project, **Tasks Basic Data**, Tasks Dates, Tasks Relationships, Tasks Relationships Details, Save Project, and Finished. Below the navigation bar is a filter section with fields for Task, Task type, Superior element, and Phase. The main area contains a table with the following columns: Task, Superior element, Status, Sort Number, Date period, Work, Work Unit, and Action. The 'Action' column for the first row is expanded, showing options: Create task, Create subtask, Delete task, and **Edit task** (highlighted with a red box).

Task	Superior element	Status	Sort Number	Date period	Work	Work Unit	Action
Product concept testing	PCP Quotation		00010	22.08.2022-02.09.2022	12,00	Hour	<ul style="list-style-type: none"> <li>Create task</li> <li>Create subtask</li> <li>Delete task</li> <li><b>Edit task</b></li> </ul>
Sizes Definition	PCP Quotation		00020	24.01.2020-20.02.2020	20,00	Hour	
Gate 1 Review	PCP Quotation		00030	21.02.2020-25.02.2020	30,00	Hour	
Approval for new raw materials	PCP Industrialization		00010	26.02.2020-23.04.2020	40,00	Hour	
Production tool order	PCP Industrialization		00020	26.02.2020-07.05.2020	50,00	Hour	
Grobauslegung	PCP Industrialization		00030	26.02.2020-21.05.2020	60,00	Hour	

In the window that opens, the basic data can be changed and additional data can be entered. The "Back to List" button takes the user to the tabular overview and accepts the changes.

The screenshot shows the 'Basic Data' application window. At the top, there is a navigation bar with steps 1 through 7: Load Project, **Tasks Basic Data**, Tasks Dates, Tasks Relationships, Tasks Relationships Details, Save Project, and Finished. Below the navigation bar is a filter section with fields for Task, Task type, Superior element, and Phase. The main area contains a form for editing task details. The form is divided into sections: Basic Data, Dates and Work, and Additional Data. The 'Basic Data' section includes fields for Name (Product concept testing), Task Type (Task Type 1), and Sort Number (00010). The 'Dates and Work' section includes fields for Calendar (Use from Project), Earliest Start/Finish (22.08.2022-02.09.2022), Latest Start/Finish (22.08.2022-02.09.2022), Start Constraint (No constraint), Fixed Start, Finish Constraint (No constraint), Fixed Finish, Duration (10), Work (12,00), and Unit for Work (Hour). The 'Additional Data' section includes fields for Grouping and Search Field. A 'Back to List' button is highlighted with a red box.

End and start times with predefined restrictions and the corresponding preferred working time can also be entered. To do this, select the "Change task" function as described above.

1 Load Project 2 **Tasks Basic Data** 3 Tasks Dates 4 Tasks Relationships 5 Tasks Relationships Details 6 Save Project 7 Finished

< Back Next >

PCP Project Structure n Sizes 1 PCP: 24.01.2020-30.09.2020

Filter  
 Task:  Task type:  Superior element:  Phase:

Task	Superior element	Status	Sort Number	Date period	Work	Work Unit	Action
Product concept testing	PCP Quotation	<input type="checkbox"/>	00010	22.08.2022-02.09.2022	12,00	Hour	<input type="text"/>
Sizes Definition	PCP Quotation	<input type="checkbox"/>	00020	24.01.2020-20.02.2020	20,00	Hour	<input type="text"/>
Gate 1 Review	PCP Quotation	<input type="checkbox"/>	00030	21.02.2020-25.02.2020	30,00	Hour	<input type="text"/>
Approval for new raw materials	PCP Industrialization	<input type="checkbox"/>	00010	26.02.2020-23.04.2020	40,00	Hour	<input type="text"/>
Production tool order	PCP Industrialization	<input type="checkbox"/>	00020	26.02.2020-07.05.2020	50,00	Hour	<input type="text"/>
Grobauslegung	PCP Industrialization	<input type="checkbox"/>	00030	26.02.2020-21.05.2020	60,00	Hour	<input type="text"/>

Restrictions and fixed start or end times can be selected in the corresponding input fields. Click on the "Back to list" button to apply the settings.

1 Load Project 2 **Tasks Basic Data** 3 Tasks Dates 4 Tasks Relationships 5 Tasks Relationships Details 6 Save Project 7 Finished

< Back Next >

Back to List

Basic Data

Name:

Task Type:

Sort Number:

**Dates and Work**

Calendar:

Earliest Start/Finish:

Latest Start/Finish:

Start Constraint:

Fixed Start:

Finish Constraint:

Fixed Finish:

Duration:

Work:

Unit for Work:

Additional Data

Grouping:

Search Field:

After clicking on the "Back to list" button, the time periods are automatically adjusted.

PCP Project Structure n Sizes 1 PCP: 24.01.2020-30.09.2020

Filter

Task:  Task type:  Superior element:  Phase:

Task	Superior element	Status	Sort Number	Date period	Work	Work Unit	Action
Product concept testing	PCP Quotation	<input type="checkbox"/>	00010	22.08.2022-02.09.2022	12,00	Hour	<input type="text"/>
Sizes Definition	PCP Quotation	<input type="checkbox"/>	00020	24.01.2020-20.02.2020	20,00	Hour	<input type="text"/>
Gate 1 Review	PCP Quotation	<input type="checkbox"/>	00030	21.02.2020-25.02.2020	30,00	Hour	<input type="text"/>
Approval for new raw materials	PCP Industrialization	<input type="checkbox"/>	00010	26.02.2020-23.04.2020	40,00	Hour	<input type="text"/>
Production tool order	PCP Industrialization	<input type="checkbox"/>	00020	26.02.2020-07.05.2020	50,00	Hour	<input type="text"/>
Grobauslegung	PCP Industrialization	<input type="checkbox"/>	00030	26.02.2020-21.05.2020	60,00	Hour	<input type="text"/>

# Create/Delete tasks and subtasks

To create a new task, select the "Create task" action menu. It will take over the element of the respective line that is already assigned to it.

The screenshot shows the 'Tasks Basic Data' screen with a navigation bar at the top containing steps 1 through 7. Below the navigation bar is a filter section with fields for Task, Task type, Superior element, and Phase. The main area contains a table with the following columns: Task, Superior element, Status, Sort Number, Date period, Work, Work Unit, and Action. The 'Action' column for the first row is highlighted with a red box, and a dropdown menu is open, showing options: 'Create task', 'Create subtask', 'Delete task', and 'Edit task'. The 'Create task' option is also highlighted with a red box.

Task	Superior element	Status	Sort Number	Date period	Work	Work Unit	Action
Product concept testing	PCP Quotation		00010	22.08.2022-02.09.2022	12,00	Hour	<ul style="list-style-type: none"> <li>Create task</li> <li>Create subtask</li> <li>Delete task</li> <li>Edit task</li> </ul>
Sizes Definition	PCP Quotation		00020	24.01.2020-20.02.2020	20,00	Hour	
Gate 1 Review	PCP Quotation		00030	21.02.2020-25.02.2020	30,00	Hour	
Approval for new raw materials	PCP Industrialization		00010	26.02.2020-23.04.2020	40,00	Hour	
Production tool order	PCP Industrialization		00020	26.02.2020-07.05.2020	50,00	Hour	
Grobauslegung	PCP Industrialization		00030	26.02.2020-21.05.2020	60,00	Hour	

After selection the Basic Data Maintenance screen opens again, where all task settings can be entered. By clicking on the "Back to List" button, all the data is transferred.

The screenshot shows the 'Basic Data' maintenance screen. At the top, there is a navigation bar with steps 1 through 7. Below the navigation bar is a 'Back to List' button highlighted with a red box. The main area contains a form with the following sections: 'Basic Data' (Name, Task Type, Sort Number), 'Dates and Work' (Calendar, Earliest Start/Finish, Latest Start/Finish, Start Constraint, Fixed Start, Finish Constraint, Fixed Finish, Duration, Work, Unit for Work), and 'Additional Data' (Grouping, Search Field).



The task is now displayed in a table below the last task and has the status "New". The primary element corresponds to the "Primary element" column in the row in which the action menu was selected.

PCP Project Structure n Sizes 1 PCP: 24.01.2020-30.09.2020

Filter

Task:  Task type:  Superior element:  Phase:

Task	Superior element	Status	Sort Number	Date period	Work	Work Unit	Action
Product concept testing	PCP Quotation		00010	22.08.2022-02.09.2022	12,00	Hour	
<b>Test1.0</b>	PCP Quotation	<b>New</b>	00011	00.00.0000-24.01.2020	0,00	Hour	
Sizes Definition	PCP Quotation		00020	24.01.2020-20.02.2020	20,00	Hour	
Gate 1 Review	PCP Quotation		00030	21.02.2020-25.02.2020	30,00	Hour	
Approval for new raw materials	PCP Industrialization		00010	26.02.2020-23.04.2020	40,00	Hour	
Production tool order	PCP Industrialization		00020	26.02.2020-07.05.2020	50,00	Hour	
Grobauslegung	PCP Industrialization		00030	26.02.2020-21.05.2020	60,00	Hour	

A sub-task can be created via the "Create subtask" action menu.

PCP Project Structure n Sizes 1 PCP: 24.01.2020-30.09.2020

Filter

Task:  Task type:  Superior element:  Phase:

Task	Superior element	Status	Sort Number	Date period	Work	Work Unit	Action
Product concept testing	PCP Quotation		00010	22.08.2022-02.09.2022	12,00	Hour	
Test1.0	PCP Quotation	New	00011	00.00.0000-24.01.2020	0,00	Hour	
Sizes Definition	PCP Quotation		00020	24.01.2020-20.02.2020	20,00	Hour	
Gate 1 Review	PCP Quotation		00030	21.02.2020-25.02.2020	30,00	Hour	
Approval for new raw materials	PCP Industrialization		00010	26.02.2020-23.04.2020	40,00	Hour	
Production tool order	PCP Industrialization		00020	26.02.2020-07.05.2020	50,00	Hour	
Grobauslegung	PCP Industrialization		00030	26.02.2020-21.05.2020	60,00	Hour	

By selecting this option, the basic data maintenance page opens again, in which all subtask details are entered. Click on the "Back to list" button to accept all data.

1 Load Project   2 **Tasks Basic Data**   3 Tasks Dates   4 Tasks Relationships   5 Tasks Relationships Details   6 Save Project   7 Finished

< Back   Next >

**Back to List**

Basic Data

Name:

Task Type: Task Type 1

Sort Number: 00011

Dates and Work

Calendar: Use from Project

Earliest Start/Finish: 00.00.0000-24.01.2020

Latest Start/Finish: 00.00.0000-24.01.2020

Start Constraint: No constraint

Fixed Start:

Finish Constraint: No constraint

Fixed Finish:

Duration: 0

Work: 0,00

Unit for Work: Hour

Additional Data

Grouping:

Search Field:

The subtask is now listed in a tab below the last task and given the status "New". The superior element corresponds to the "Task" column in the row in which the action menu was selected.

1 Load Project   2 **Tasks Basic Data**   3 Tasks Dates   4 Tasks Relationships   5 Tasks Relationships Details   6 Save Project   7 Finished

< Back   Next >

PCP Project Structure n Sizes 1 PCP: 24.01.2020-30.09.2020

Filter

Task:  Task type:  Superior element:  Phase:

Task	Superior element	Status	Sort Number	Date period	Work	Work Unit	Action
Product concept testing	PCP Quotation		00010	22.08.2022-02.09.2022	12,00	Hour	
<b>Test1.0</b>	PCP Quotation	<b>New</b>	00011	00.00.0000-24.01.2020	0,00	Hour	
Sizes Definition	PCP Quotation		00020	24.01.2020-20.02.2020	20,00	Hour	
Gate 1 Review	PCP Quotation		00030	21.02.2020-25.02.2020	30,00	Hour	
Approval for new raw materials	PCP Industrialization		00010	26.02.2020-23.04.2020	40,00	Hour	
Production tool order	PCP Industrialization		00020	26.02.2020-07.05.2020	50,00	Hour	
Grobauslegung	PCP Industrialization		00030	26.02.2020-21.05.2020	60,00	Hour	

Tasks and Subtasks can be deleted via the "Delete Task" action menu.

PCP Project Structure n Sizes 1 PCP- 24.01.2020-30.09.2020

Filter

Task:  Task type:  Superior element:  Phase:

Task	Superior element	Status	Sort Number	Date period	Work	Work Unit	Action
Product concept testing	PCP Quotation		00010	22.08.2022-02.09.2022	12,00	Hour	<input type="text"/>
Test1.0	PCP Quotation	New	00011	00.00.0000-24.01.2020	0,00	Hour	<input type="text"/>
Sizes Definition	PCP Quotation		00020	24.01.2020-20.02.2020	20,00	Hour	<input type="text"/>
Gate 1 Review	PCP Quotation		00030	21.02.2020-25.02.2020	30,00	Hour	<input type="text"/>
Approval for new raw materials	PCP Industrialization		00010	26.02.2020-23.04.2020	40,00	Hour	<input type="text"/>
Production tool order	PCP Industrialization		00020	26.02.2020-07.05.2020	50,00	Hour	<input type="text"/>
Grobauslegung	PCP Industrialization		00030	26.02.2020-21.05.2020	60,00	Hour	<input type="text"/>

Create task

Create subtask

**Delete task**

Edit task

The task is no longer displayed in the list after selection.

Test	Phase-01: Prüfung	Neu	00013	00.00.0000-01.08.2022	0,00	Stunde	<input type="text"/>
014	Phase-01: Prüfung		00014	01.08.2022-25.11.2022	0,00	Stunde	<input type="text"/>

# Scheduling Tasks

By clicking on the "Next" button, you will be redirected to the following page "Tasks Appointments".

PCP Project Structure n Sizes 1 PCP: 24.01.2020-30.09.2020

Filter

Task:  Task type:  Superior element:  Phase:

Task	Superior element	Status	Sort Number	Date period	Work	Work Unit	Action
Product concept testing	PCP Quotation		00010	22.08.2022-02.09.2022	12,00	Hour	
Test1.0	PCP Quotation	New	00011	00.00.0000-24.01.2020	0,00	Hour	
Sizes Definition	PCP Quotation		00020	24.01.2020-20.02.2020	20,00	Hour	
Gate 1 Review	PCP Quotation		00030	21.02.2020-25.02.2020	30,00	Hour	
Approval for new raw materials	PCP Industrialization		00010	26.02.2020-23.04.2020	40,00	Hour	
Production tool order	PCP Industrialization		00020	26.02.2020-07.05.2020	50,00	Hour	
Grobauslegung	PCP Industrialization		00030	26.02.2020-21.05.2020	60,00	Hour	

On the "Task Dates" page, the start and end dates can be changed, as well as in the basic data maintenance of the individual tasks. The overview table also helps with allocation and planning. The status of newly created tasks is applied.

PCP Project Structure n Sizes 1 PCP: 24.01.2020-30.09.2020

Filter

Task:  Task type:  Superior element:  Phase:

Task	Status	Earliest Start/Finish	Latest Start/Finish	Duration	Start Constraint	Start	Finish Constraint	Finish
Product concept testing		22.08.2022-02.09.2022	22.08.2022-02.09.2022	10	No constraint		No constraint	
Test1.0	New	00.00.0000-24.01.2020	00.00.0000-24.01.2020	0	No constraint		No constraint	
Sizes Definition		24.01.2020-20.02.2020	24.01.2020-20.02.2020	20	No constraint		No constraint	
Gate 1 Review		21.02.2020-25.02.2020	21.02.2020-25.02.2020	3	No constraint		No constraint	
Approval for new raw materials		26.02.2020-23.04.2020	25.03.2020-21.05.2020	40	No constraint		No constraint	
Production tool order		26.02.2020-07.05.2020	11.03.2020-21.05.2020	50	No constraint		No constraint	
Grobauslegung		26.02.2020-21.05.2020	26.02.2020-21.05.2020	60	No constraint		No constraint	

By clicking on the "Back" button, the "Basic Data Tasks" page opens. Please note that changes made via the drop-down menu must first be confirmed with Enter. Otherwise the changes will not be saved and may have to be re-entered.

1 — 2 — 3 — 4 — 5 — 6 — 7

Load Project   Tasks Basic Data   **Tasks Dates**   Tasks Relationships   Tasks Relationships Details   Save Project   Finished

**< Back**   Next >

PCP Project Structure n Sizes 1 PCP: 24.01.2020-30.09.2020

Filter

Task:  Task type:  Superior element:  Phase:

Task	Status	Earliest Start/Finish	Latest Start/Finish	Duration	Start Constraint	Start	Finish Constraint	Finish
Product concept testing		22.08.2022-02.09.2022	22.08.2022-02.09.2022	10	No constraint	<input type="text"/>	No constraint	<input type="text"/>
Test1.0	New	00.00.0000-24.01.2020	00.00.0000-24.01.2020	0	No constraint	<input type="text"/>	No constraint	<input type="text"/>
Sizes Definition		24.01.2020-20.02.2020	24.01.2020-20.02.2020	20	No constraint	<input type="text"/>	No constraint	<input type="text"/>
Gate 1 Review		21.02.2020-25.02.2020	21.02.2020-25.02.2020	3	No constraint	<input type="text"/>	No constraint	<input type="text"/>
Approval for new raw materials		26.02.2020-23.04.2020	25.03.2020-21.05.2020	40	No constraint	<input type="text"/>	No constraint	<input type="text"/>
Production tool order		26.02.2020-07.05.2020	11.03.2020-21.05.2020	50	No constraint	<input type="text"/>	No constraint	<input type="text"/>
Grobauslegung		26.02.2020-21.05.2020	26.02.2020-21.05.2020	60	No constraint	<input type="text"/>	No constraint	<input type="text"/>

By clicking on the "Next" button, the next page will open.

# Set and save relationships

The relationships between the individual tasks are set on this page. Multiple relationships are allowed as long as they will not lead to contradictions. To do this, the individual numbers must be separated by a semicolon. The time dependency between the tasks is always "0" days.

Task	Superior element	Number	Predecessor	Successor
Product concept testing	PCP Quotation	1		
Test1.0	PCP Quotation	2		
Sizes Definition	PCP Quotation	3		4
Gate 1 Review	PCP Quotation	4	3	
Approval for new raw materials	PCP Industrialization	5		
Production tool order	PCP Industrialization	6		
Grobauslegung	PCP Industrialization	7		

The entry of a predecessor is confirmed with Enter. This automatically enters the successor in the corresponding line.

Task	Superior element	Number	Predecessor	Successor
Product concept testing	PCP Quotation	1		
Test1.0	PCP Quotation	2		
Sizes Definition	PCP Quotation	3		4
Gate 1 Review	PCP Quotation	4	3	
Approval for new raw materials	PCP Industrialization	5		
Production tool order	PCP Industrialization	6		
Grobauslegung	PCP Industrialization	7		

It is also possible to change the relationships by using a code. A basic distinction is made between the following relationships:

- Standard sequence (EA)
- Initial sequence (AA)
- Final sequence (EE)

- Jump sequence (AE)

The time period can be supplemented by entering a " Plus Sign". The entry in the "Successor" column is also made automatically here. By clicking on the "Next" button, you will be redirected to the next page.

PCP Project Structure n Sizes 1 PCP: 24.01.2020-30.09.2020

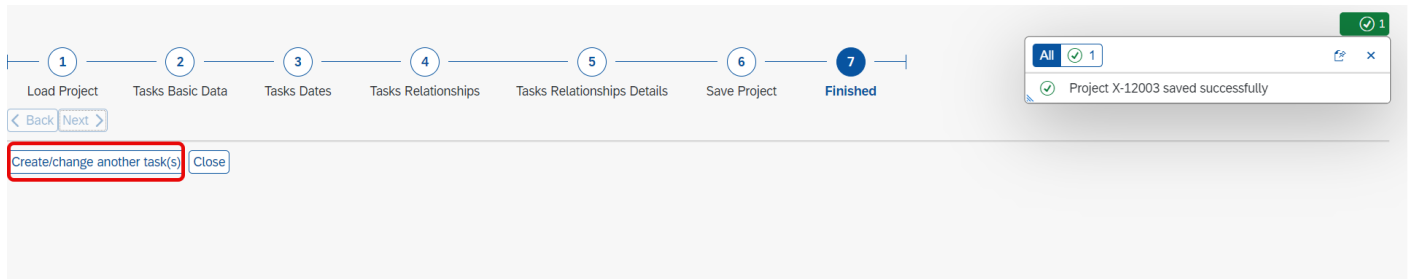
Task	Superior element	Number	Predecessor	Successor
Product concept testing	PCP Quotation	1		13:9EE+15;15
Test1.0	PCP Quotation	2		
Sizes Definition	PCP Quotation	3		4
Gate 1 Review	PCP Quotation	4	3	
Approval for new raw materials	PCP Industrialization	5	13AE+5	
Production tool order	PCP Industrialization	6	1EE+15	
Grobauslegung	PCP Industrialization	7		11AE+0;8AE+5

Detailed information on the relationships can be displayed here and the predecessors and successors of the respective tasks can be displayed. The "Relationship Type" column shows the type of relationship. The "Calendar" column refers to the calendar dates used, which can differ from country to country. The "Time interval" column lists the time intervals that were entered using the coding described above. The "Status" column shows newly created relationships for tasks or subtasks. It is also possible to open the "Task relationships" view using the "Back" button. Entries that have not been confirmed with Enter will be lost.

PCP Project Structure n Sizes 1 PCP: 24.01.2020-30.09.2020

Task	Predecessor	Successor	Time Interval	Calendar	Relationship Type
Sizes Definition		Gate 1 Review	0	Use from Project	Finish-start relation...
Gate 1 Review	Sizes Definition		0	Use from Project	Finish-start relation...

In this window, all settings in the "Calendar" and "Relationship Type" columns always lead to an automatic adjustment of the respective predecessor or successor. The project can be saved by clicking on the "Next" button. Here the user can create further tasks or close the application.





# Set Filter

The option of setting filters supports quick assignment, even for complex and deeply structured projects. The filters can be assigned to the individual columns and also have a masking function. Filters that have been set are adopted on the following pages.

1 Load Project 2 **Tasks Basic Data** 3 Tasks Dates 4 Tasks Relationships 5 Tasks Relationships Details 6 Save Project 7 Finished

< Back Next >

PCP Project Structure n Sizes 1 PCP: 24.01.2020-30.09.2020

Filter

task:  Task type:  Superior element:  Phase:

Task	Superior element	Status	Sort Number	Date period	Work	Work Unit	Action
Product concept testing	PCP Quotation	<input type="checkbox"/>	00010	22.08.2022-02.09.2022	12,00	Hour	<input type="text"/>
Test1.0	PCP Quotation	<input type="checkbox"/>	00011	00.00.0000-24.01.2020	0,00	Hour	<input type="text"/>
Sizes Definition	PCP Quotation	<input type="checkbox"/>	00020	24.01.2020-20.02.2020	20,00	Hour	<input type="text"/>
Gate 1 Review	PCP Quotation	<input type="checkbox"/>	00030	21.02.2020-25.02.2020	30,00	Hour	<input type="text"/>
Approval for new raw materials	PCP Industrialization	<input type="checkbox"/>	00010	05.09.2022-28.10.2022	40,00	Hour	<input type="text"/>
Production tool order	PCP Industrialization	<input type="checkbox"/>	00020	05.09.2022-11.11.2022	50,00	Hour	<input type="text"/>
Grobauslegung	PCP Industrialization	<input type="checkbox"/>	00030	05.09.2022-25.11.2022	60,00	Hour	<input type="text"/>

To hide search entries, enter \*Value\* in the corresponding filter field. Only data contained the criteria entered in the respective column will be displayed.

