

SAP PPM User Guide – How to Create and Update Initiatives

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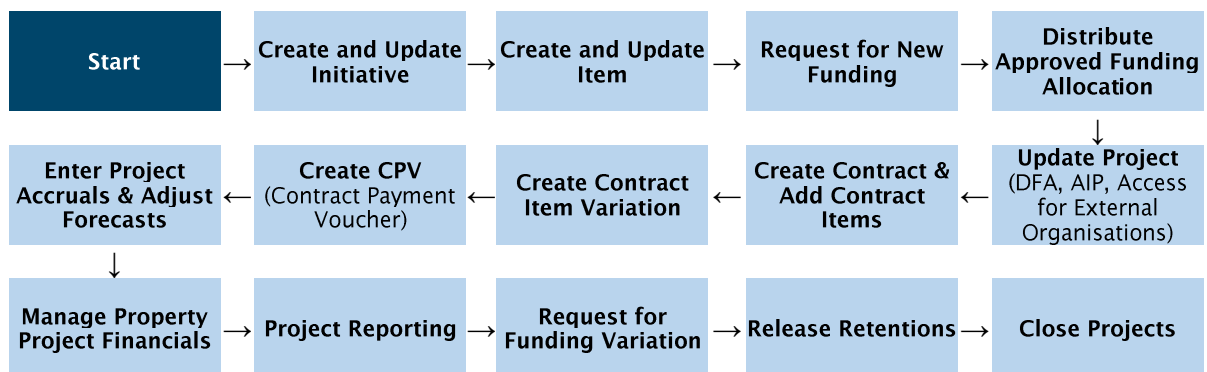
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Click to open an SAP PPM Guide from this general process diagram below.



Contents

SAP PPM User Guide – How to Create and Update Initiatives	1
Contents	2
Purpose	2
Responsible Role	2
Prerequisites	2
Scope	2
Related Documents	2
1. Create an Initiative.....	3
Name Your Initiative to the Standard Project Naming Guideline	4
Programme Business Case Initiative	5
Improvement Initiative	6
Emergency Works Initiative.....	7
Low Cost Low Risk (LCLR) Initiative	8
2. Search for Initiatives	9
Use additional search criteria	9

Purpose

This document lists the steps for you to create, update and search for an Initiative in SAP PPM.

Responsible Role

- Project Manager

Prerequisites

Not applicable

Scope

The scope of this document is the SAP Initiative. You should refer to other guides for SAP Items, Projects, Phases, Tasks, Contracts or CPVs.

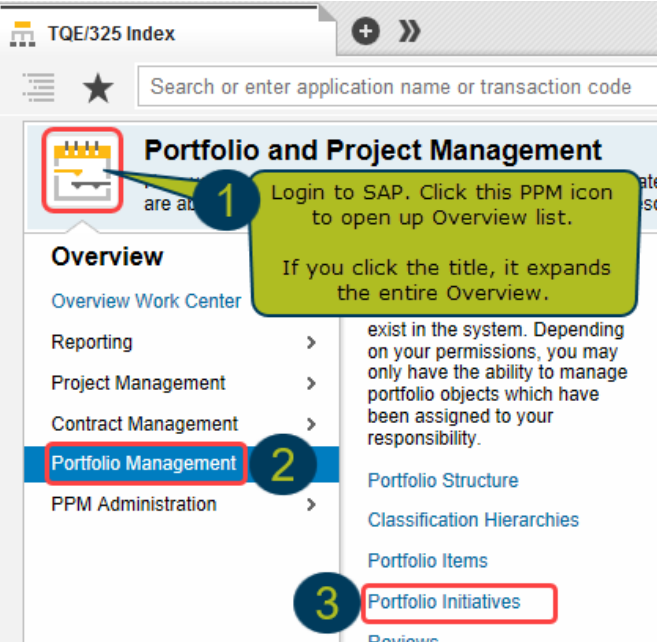
NOC/MOR Items (which are non-funded) or NOC/MOR Projects (which are funded) are not created within an Initiative. NOC = Network Outcome Contract. MOR = Maintenance, Operations and Renewal

Related Documents

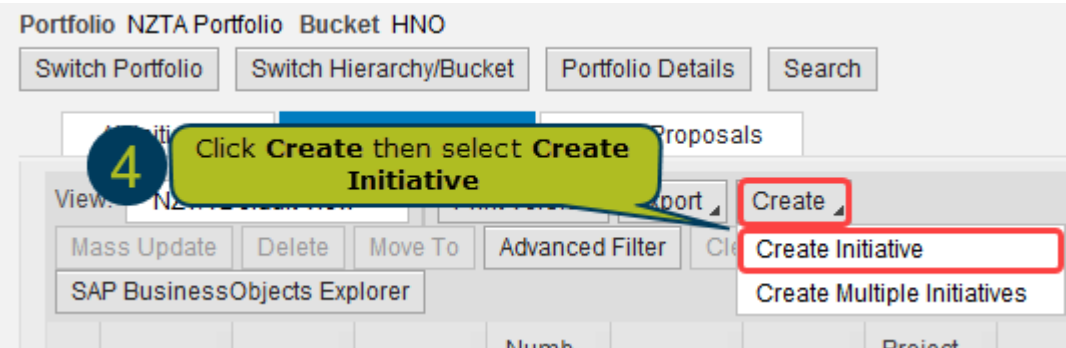
 [Standard Project Naming Guideline](#)

1. CREATE AN INITIATIVE

Screen: Index



Screen: Portfolio Initiatives



Screen: Create Initiative

Create Initiative

9 Click Continue

5 If HNO isn't the Bucket Name, click **Select Bucket**

8 Select your **Initiative Type** from this list

Bucket Name: * HNO **Select Bucket**

Initiative Template: View Template OR Initiative Type: 01 Improvements, 02 Programme Business Case, 03 Minor Improvements, 10 Maintenance & Renewals, 11 Preventive Maintenance, 13 Emergency Works, 30 Corporate (NLTP Funded - Others)

Select Bucket

Current Bucket: NZTA Portfolio > HNO

Select the bucket in which the new initiative is to be saved. Note that you can only save initiatives in buckets that have no subbuckets.

Show All Buckets

Class. Hierarchy Structure of Buckets

6 Select **HNO** and click **OK**

7 OK Cancel

Name Your Initiative to the Standard Project Naming Guideline

Initiatives and its Items/Projects must follow standard project naming guideline in all systems. Refer to the [Project Naming Guideline](#)

Then go to the relevant page ahead depending on the Initiative Type you want to create...

To Create a	Select	And go to Page
Programme Business Case	02 Programme Business Case	Page 5
Improvement	01 Improvements	Page 6
Emergency Work	13 Emergency Works	Page 7
Low Cost Low Risk	03 Minor Improvements	Page 8

Programme Business Case Initiative

3 Click **Save**

2 Click **GIS Functions** and select **Get COORDS from RS/RP**
(Completed Reference Station and/or Route Position fields are required)

1 Complete the red areas. Fields marked with * are compulsory.

Name: * Use standard project naming convention

ID:

Initiative Type: * 02 Programme Business Case

Responsible Resource:

Responsible: Not Assigned

Description: Upload Image

Items: 0

Dates

Forecasted Start/Finish: This date is when work is due to start (dd.mm.yyyy) and end. When you maintain this initiative during its life, you can change these dates to suit the Financial Planning screen.

TIO Reference: 0000000000

Region: *

Programme business case/Package:

Strategic Case/Primary Strategy:

Project Team Leader: Advanced Search

Projects Team Leader name:

Project sponsor: Advanced Search

Project sponsor name:

Project Manager: * Advanced Search

Project Manager name:

NZTA Focus

NZTA Focus Area:

Location Information

Brief description of location: *

SH Classification:

State Highway:

Project Length (km): 0.000

Start Reference Station: 0000

Start Route Position: 0.00

End Reference Station: 0000

End Route Position: 0.00

Projection:

Left X Coordinate: 0.000

Right X Coordinate: 0.000

Left Y Coordinate: 0.000

Right Y Coordinate: 0.000

Improvement Initiative

4 Click **Save**

2 Click **GIS Functions** button and select **Get COORDS from RS/RP**. (Completed Reference Station and/or Route Position fields are required)

1 Complete the red areas. Fields marked with * are compulsory.

3 Complete the applicable fields in the **Additional Information** and **Financial Information** tabs. Click **Save** button to save your data.

This date is when work is due to start (dd.mm.yyyy) and end. When you maintain this initiative during its life, you can change these dates to suit the Financial Planning screen.

Overview

General Information | **Additional Information** | Financial Information

Key Information

Name: * Use standard project naming convention ID:

Initiative Type: * Responsible Resource:

Responsible:

Description: Upload Image

Items: 0

Dates

Forecasted Start/Finish: /

TIO Reference:

Programme business case/Package:

Improvement project type: *

Region: *

Strategic Case/Primary Strategy:

Programme Type:

Project Team Leader: Advanced Search

Projects Team Leader name:

Project sponsor: Advanced Search

Project sponsor name:

Project Manager: * Advanced Search

Project Manager name:

NZTA Focus

NZTA Focus Area:

Location Information

Brief description of location: *

State Highway:

Start Reference Station:

End Reference Station:

SH Classification:

Project Length (km):

Start Route Position:

End Route Position:

Projection:

Left X Coordinate:

Right X Coordinate:

Left Y Coordinate:

Right Y Coordinate:

Emergency Works Initiative

Save **GIS Functions**

1 Complete the red areas. Fields marked with * are compulsory.

2 Only complete these fields in this shaded green area if the event is contained in one location

3 Optional: Click GIS Functions button and choose Get COORDS from RS/RP

4 Click Save

Key

Name: * Must follow naming convention - name on funding application form

ID:

Initiative Type: * 13 Emergency Works

Responsible Resource:

Responsible: Not Assigned

Description: Brief description of event regarding assets affected

Items:

Dates

Forecasted Start/Finish: /

This date is when work is due to start (dd.mm.yyyy) and end. When you maintain this initiative during its life, you can change these dates to suit the Financial Planning screen.

Date of event causing damage: * Use event date of funding application

Date of reporting to NZTA contact: *

TIO Reference: 0000000000

Region: *

Project Team Leader:

Projects Team Leader name:

Project sponsor:

Project sponsor name:

Project Manager: *

Project Manager name:

NZTA Focus

NZTA Focus Area:

Location Information

Brief description of location: * Use event location

SH Classification:

State Highway:

Project Length (km):

Start Reference Station:

Start Route Position:

End Reference Station:

End Route Position:

Projection:

Left X Coordinate:

Right X Coordinate:

Left Y Coordinate:

Right Y Coordinate:

Low Cost Low Risk (LCLR) Initiative

LCLR Initiatives are created by a team, with one LCLR Initiative per region. It is created once every 3 years. LCLR must be: explicitly named under standard project naming convention, geographically identifiable, and under \$1 million.

If you want to do a new piece of LCLR work, you should create a new SAP Phase within an existing regional LCLR Initiative.

Create Initiative

Save **2** Click Save Filters GIS Functions You can also

1 Complete the red areas. Fields marked with * are compulsory.

Overview Documents and Notes

General Information | Additional Information | Financial Information | Author

Key Information

Name: * Use standard project naming convention

Initiative Type: * 03 Minor Improvements Responsible Resource: [dropdown]

Responsible: Not Assigned

Description: [text area] Upload Image

Items: 0

Dates

Forecasted Start/Finish: [calendar] / [calendar]

This date is when work is due to start (dd.mm.yyyy) and end. When you maintain this initiative during its life, you can change these dates to suit the Financial Planning screen.

TIO Reference: 0000000000

Project Team Leader: [text] Advanced Search

Project sponsor: [text] Advanced Search

Project Manager: * [text] Advanced Search

Region: * [dropdown]

Projects Team Leader name: [text]

Project sponsor name: [text]

Project Manager name: [text]

NZTA Focus

NZTA Focus Area: [dropdown]

2. SEARCH FOR INITIATIVES

Screen: Portfolio Initiatives

Portfolio NZTA Portfolio Management

Switch Portfolio [] Search

1 Go to the **Portfolio Initiatives Screen** (start from SAP Index Screen > Portfolio Management > Portfolio Initiatives)

2 Click this Filter button to open the Filter Row. It is faster to search this way.

3 This row opens when you click the Filter button

4 Insert stars/asterisks at the front and back of your search words, and press **Enter**. e.g. *Vic* would give Mt Victoria or Vickers or Vic/Victoria Park

5 Select the lefthand column to show the Related Items of the Initiative below

6 Click the Initiative Name to open the Initiative details in another tab

Name	Number of Items	Region	Project Manager	Project Team Leader	Project sponsor
vic					
(af) Vic Park Tunnel	2	Auckland			
(af) Victoria Park Viaduct	3	Auckland			
Mt Victoria Tunnel - Resi...	155152013	01 Improvements	4	Wellington	
SH3 Vickers Road to Cit...	160252013	01 Improvements	4	Taranaki	
Wgtn RoNS (1) - Mt Vic ...	159512013	01 Improvements	4	Wellington	

Related Items

View: NZTA Default View [] Hide [] Projects Explorer []

These are Items/Projects in your selected Initiative. Click the blue Item Name to open the Item details in another tab

Item/Project numbers begin with 6....

Name	ID	Type	Status	Region	Work Category	Project Manager
Wgtn RoNS (1) - Mt Vic Tun...	60215958	Detailed Business Ca...	Funding Approved	Wellington	000323	
Wgtn RoNS (1) - Mt Vic Tun...	60216997	Pre Implementation (D)	Funding Approved	Wellington	000323	
Wgtn RoNS (1) - Mt Vic Tun...	60216998	Construction/Impleme...	Initial Draft	Wellington	000323	
Wgtn RoNS (1) - Mt Vic Tun...	60459512	Property	Funding Approved	Wellington	000331	

Use additional search criteria

1. On the **Portfolio Initiatives** screen (above), click **Search** Button
2. Enter the appropriate values (with the stars/asterisks) in the search fields and click **Find** Button
3. Click on the appropriate "ID" hyperlink
4. You can change the Search fields available by selecting one of the following fields from the **By** field.

Initiative Details [v]

- Initiative Details
- ID/Name
- Schedule
- Area/Location