

SAP PPM User Guide – How to Create and Update Items

Document Control

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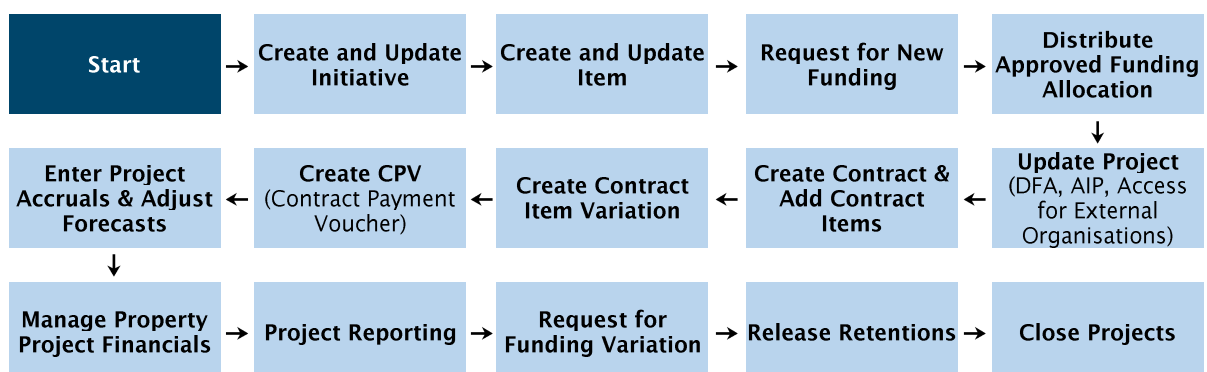
Approvals

NAME	DESIGNATION	DATE
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Approved By	NLTP Front Foot Steering Cmte	25 May 2020

Revision History

REVISION HISTORY		
Version	Date	Details
1.00	2 June 2020	First Release Version
1.01	30 June 2020	Added Single Stage Business Case item (Table 1: Create Items for Initiatives)

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



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Purpose

This document will list the steps for you to create an Item within SAP.

Scope

The scope of this document does not include the procedures for working within the Transport Investment Online (TIO) system.



Prerequisites

A created Initiative, except for NOC/MOR Items which are created without Initiatives.

Responsible Role

- Project Manager

Related Documents

-  [Standard Project Naming Guideline](#)
-  [Chart of Accounts](#)
-  [Emergency Works Rules, Guides and Processes](#)

1. CREATE AN ITEM

Screen: Index

Portfolio and Project Management

1 Login to SAP. Click this PPM icon to open up Overview list.

Overview

Overview Work Center

Reporting >

Project Management >

Contract Management >

Portfolio Management 2

PPM Administration >

3 Portfolio Initiatives

exist in the system. Depending on your permissions, you may only have the ability to manage portfolio objects which have been assigned to your responsibility.

Portfolio Structure

Classification Hierarchies

Portfolio Items

Portfolio Initiatives

Reviews

Screen: Portfolio Initiatives

Portfolio NZTA Portfolio Bucket HNO

Switch Portfolio | Switch Hierarchy/Bucket | Portfolio Details | Search

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

3 Search your Initiative here. Insert stars at the front and back of the words, and press **Enter**. e.g. *Vic* would give Mt Victoria or Vickers or Vic/Victoria Park

2 This row opens when you click the Filter button

4 Select the left-hand column to show the Related Items of the Initiative below

5 Click the Initiative Name

Name	ID	Initiative Type	Number of Items	Region	Project Manager	Project Team Leader	For
vic							
(af) Vic Park Tunnel	100022013	01 Improvements	2	Auckland			
(af) Victoria Park Viaduct	160032013	01 Improvements	3	Auckland			
	2013	01 Improvements	4	Wellington			
	2013	01 Improvements	4	Taranaki			
Wgtn RoNS (1) - Mt Vic	159512013	01 Improvements	4	Wellington			

Related Items

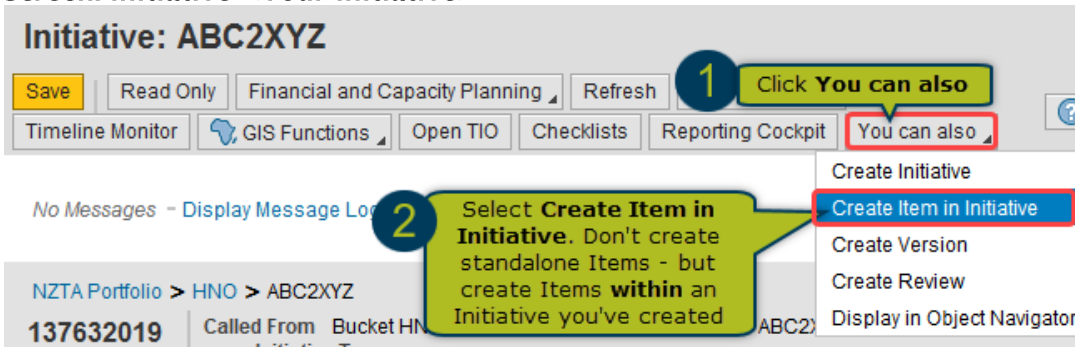
View: NZTA Default View | Print Version | Export | Hide This View | SAP BusinessObjects Explorer

Name	ID	Type	Status	Region	Work Category
Wgtn RoNS (1) - Mt Vic Tun...	60215958	Detailed Business Ca...	Fund		00323
Wgtn RoNS (1) - Mt Vic Tun...	60216997	Pre Implementation (D)	Fund		00323
Wgtn RoNS (1) - Mt Vic Tun...	60216998	Construction/Impleme...	Fund		00323
Wgtn RoNS (1) - Mt Vic Tun...	60459512	Property	Fund		00331

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

Item/Projects begin with 6....

Screen: Initiative <Your Initiative>



Screen: Create Item

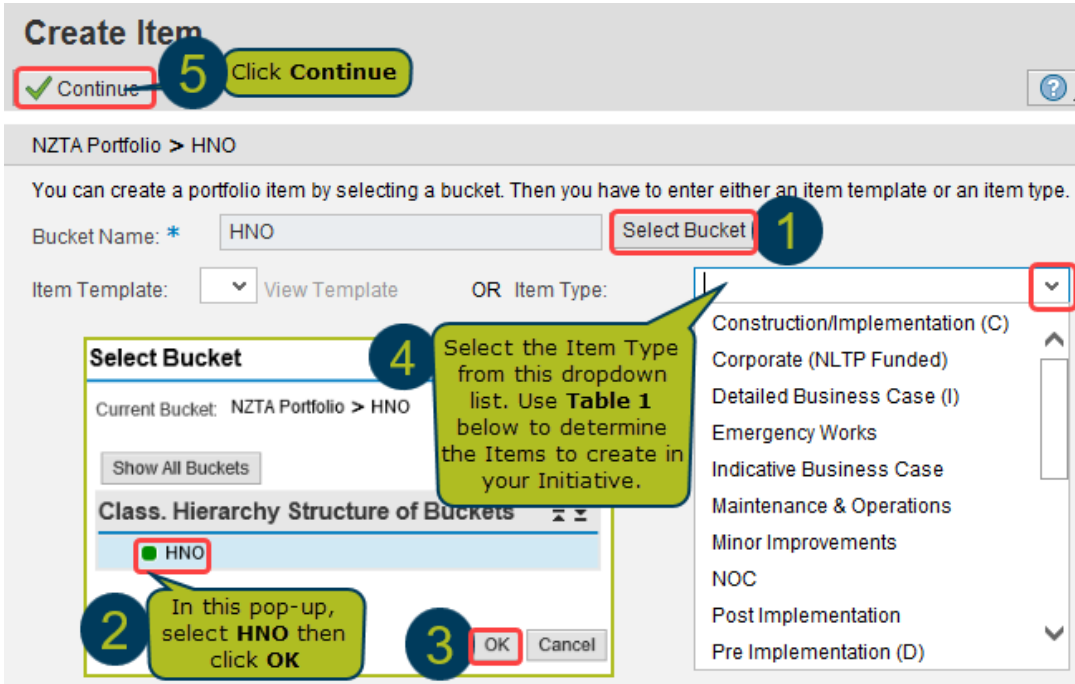


Table 1. These are the Items you will need to create for the Initiative.

Initiative	Items to Create		
Programme Business Case	<input type="checkbox"/> Create 1 Programme Business Case Item		
Improvement	<p>Depending on the investment assessment decisions, create either:</p> <table border="0"> <tr> <td> 4 Items: <input type="checkbox"/> Single Stage Business Case (SSBC) <input type="checkbox"/> Pre-Implementation <input type="checkbox"/> Property <input type="checkbox"/> Construction/Implementation </td> <td> or 5 Items: <input type="checkbox"/> Indicative Business Case (IBC) <input type="checkbox"/> Detailed Business Case (DBC) <input type="checkbox"/> Pre-Implementation <input type="checkbox"/> Property <input type="checkbox"/> Construction/Implementation </td> </tr> </table> <p>Note: If you're creating a SSBC Item, then you don't need to create the IBC and DBC Items.</p>	4 Items: <input type="checkbox"/> Single Stage Business Case (SSBC) <input type="checkbox"/> Pre-Implementation <input type="checkbox"/> Property <input type="checkbox"/> Construction/Implementation	or 5 Items: <input type="checkbox"/> Indicative Business Case (IBC) <input type="checkbox"/> Detailed Business Case (DBC) <input type="checkbox"/> Pre-Implementation <input type="checkbox"/> Property <input type="checkbox"/> Construction/Implementation
4 Items: <input type="checkbox"/> Single Stage Business Case (SSBC) <input type="checkbox"/> Pre-Implementation <input type="checkbox"/> Property <input type="checkbox"/> Construction/Implementation	or 5 Items: <input type="checkbox"/> Indicative Business Case (IBC) <input type="checkbox"/> Detailed Business Case (DBC) <input type="checkbox"/> Pre-Implementation <input type="checkbox"/> Property <input type="checkbox"/> Construction/Implementation		
Low Cost Low Risk (formerly Minor Improvement)	<input type="checkbox"/> Create 1 Minor Improvements Item Note: A team creates this Initiative every 3 years. There is one Initiative per Region.		
Emergency Works	<input type="checkbox"/> Create 1 Emergency Works Item/Project per emergency works event Note: This is Work Category 141. Refer to the rules, guides and processes for this activity		

Screen: Item <Your Item Name>

Item: ABC2XYZ

Save Read Only Financial and Capacity Planning Refresh Print Fac Open TIO You can also

Display Message Log

NZTA Portfolio > LINC > ABC2XYZ

60051 ID 60051986 Name ABC2XYZ Type Actual Cost 0.00 Planned C

Item De

General Information Financial Information Relationships Documents and Notes Authorizations Long Texts

Key Information

Name: * Item name must be same as Initiative name

Status: Initial Draft

Project Management Template: Create Project on Saving

Initiative Name: ABC2XYZ

Description: Keep the description brief. For Emergency Work, describe the event and assets affected

Upload Image

Dates

Forecasted Start/Finish: /

TIO Reference: 0000000000

Region:

Work Category: *

Project Manager: Advanced Search

DFA: Advanced Search

Substantially Complete Date: /

Project Manager name:

AIP Team Administration Group: * Ref. Chart of Accounts link below

1 Complete the red boxes and take note from the green boxes. Click **Save**

2 Change **from Initial Draft to Draft** so it can create this Item in TIO. Click **Save**.
For Emergency Work, change the status to 'Under Review - New Approval' - this creates the SAP Project automatically.

3 Click **Open TIO** to update required TIO system fields as per TIO training. Update TIO with relevant information not held in SAP to include it in the planning process and funding approval

Change DFA if different from the Project Manager

🔗 [Chart of Accounts link](#) (via OnRamp > I need to > Financial > Chart of Accounts)

The Initiative and its Item names must follow 🔗 [Standard Project Naming Guideline](#) in all systems. The Item must be the same name as the Initiative.

2. SEARCH FOR AN ITEM

From the SAP PPM **Index Screen** > click on **Portfolio Management** > **Portfolio Items**

Screen: Portfolio Items

Portfolio NZTA Portfolio Bucket HNO

Switch Portfolio Switch Hierarchy/Bucket Portfolio Details Search

Searching from this button is slower and less user-friendly

All Items Active Items Active Proposals Active Escalations Inactive Items

View Mass Update

3 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

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

2 This row opens when you click the Filter button

Name	Status	Region	Work Category	Project Manager
vic				
NO HNO Busine...	60035880	NOC	Funding Approved	National Office
NO HNO Project ...	60035560	NOC	Funding Approved	National Office
Wgtn RoNS (1) - ...	60215958	Detailed Busine...	Funding Approved	Wellington
SH3 Vickers Ro...	60460252	Property	Funding Approved	Taranaki

3. MARK AN ITEM AS SUBSTANTIALLY COMPLETE

Screen: Item <Your Item Name> (General Information Tab)

Item: ABC2XYZ

Save **3** Press **Save.** End Capacity Planning Refresh Print Fact Sheet Reporting Cockpit Timeline Monitor Open TIO Y

Display Message Log

NZTA Portfolio > HNO > ABC2XYZ

6005198 **1** Go to your relevant Item. Make sure this is the correct Item, Item Type and ID

Item Decision Flow

TIO Reference: 0000000000

Work Category: *

Project Manager name:

AIP Team Administration Group: *

2 Enter the date according to **Table 2 below.** This date can't be set in the future.

Substantially Complete Date: **1**

Table 2: What is a Substantially Complete Item?

Item Type	Description of Substantially Complete
Programme Business Case	Programme Business Case has been supported
Indicative Business Case	Indicative Business Case has been supported
Detailed Business Case	Detailed Business Case document or Scheme Assessment report has been approved
Property	All Property Acquisitions or Land Entry Agreements have been completed or obtained
Pre-implementation	Design construction drawings, estimate & contract documentation are complete, designations & consents are in place
Construction / Implementation	Practical completion has been achieved (as NZS 3910) and the Defects Liability Period underway
Post Implementation / Construction	Post Implementation Review and contract completion achieved
Emergency Works	As per Construction
Minor Improvements	All Phases have reached Practical Completion (as per construction)