

SAP PPM User Guide – How to Update Projects

Includes updating AIP Certifiers, DFAs, and Giving Access for External Organisations

Document Control

DOCUMENT DETAILS	
Document Owner	Enterprise Portfolio Management Office
Effective Date	2 June 2020
Expiry Date	2 June 2023
Created By	Sam Fung, SAP PPM Process Analyst

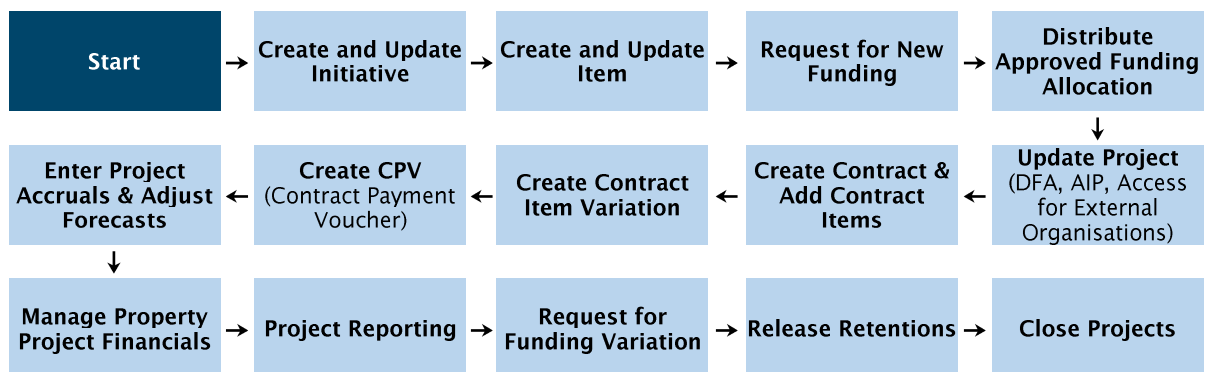
Approvals

NAME	DESIGNATION	DATE
Reviewed By	Gareth Thompson–Darling Senior FMIS Support Analyst	27 May 2020
Approved By	NLTP Management Steering Cmte.	25 May 2020

Revision History

REVISION HISTORY		
Version	Date	Details
1.0	2 June 2020	Final Version

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



Contents

SAP PPM User Guide – How to Update Projects	1
Contents	2
Purpose	2
Scope	2
Prerequisites	2
Responsible Role.....	2
Related Documents	2
1. Open or Search for a Project	3
2. Default Phases for Different Project Types.....	4
3. Create or Edit a Phase (for Capital Projects only).....	5
4. Create Or Edit a Task (for NOC/MOR only).....	6
5. Release a Project (for NOC/MOR only)	7
6. Authorise External Organisations to Access SAP PPM.....	8
a. Start by Giving ‘Read Access’ to the Project for the External Organisation.....	8
b. Give ‘Write Access’ to Particular Phases or Tasks for External Organisations.....	9

Purpose

This document will list the steps for you to:

- update project information,
- create new phases or tasks,
- assign phase or task managers, delegated financial authority/approvers (DFA) and certifiers,
- manage the AIP workflow (Automated Invoice Payment – the online approval system for accounts payable invoices), and
- give access for authorised external organisations to certain SAP projects and its phases or tasks.

Scope

This document does not cover how to administer a project outside of SAP PPM e.g. TIO or PlanView, or detailed AIP instructions.

Prerequisites

An Item that has been approved with allocated funding.

Responsible Role

- Project Manager
- Contract Manager

Related Documents

-  [Automated Invoice Processing \(AIP\) User Guide](#)
-  [Chart of Accounts](#)

1. OPEN OR SEARCH FOR A PROJECT

Screen: Index

Portfolio and Project Management

1 In the SAP Index Screen, click the PPM icon to open up Overview list. If you click the title, it expands the entire Overview.

Overview

- Overview Work Center
- Reporting
- Project Management** 2
- Contract Management
- Portfolio Management
- PPM Administration

Project Management

You can complete project management related activities, based on your responsibility.

- Allocation Distribution
- PPM Accruals and Forecasts
- Checklist Items
- Projects** 3
- Tasks

Screen: Projects

My Projects Favorites **Last Used Projects** Substitutes

5 Click **Search** if required

4 (Recommended) Click this tab to show recent projects you've accessed

Note: This Project Filter button works only on previously searched Projects or listed below

View: NZ Default View

Search Vacant Roles Remove from

Project (Number)	Project (Description)	Project Type (Description)	Item Type	Region	Work Category	Project Manager
60026122	SH 1 Johnso...	Improvements	Indicative Bu...	Wellington	Road Improv...	Josefine Blo
60027281	East West C...	Improvements	Property	Auckland	Property pur...	John Citizen

Screen: Search

Search

Search for: Project By

Search Criteria

Project Manager: *JO* or *COLIN* etc

Region: Auck. / Cant. / BoP etc

Project Type: NMA / E.W. / Improvem't etc

Hits: 999

8 Change to **999 Hits**

9 Click **Find**

6 Select **Project Manager**

7 Enter a **name** with *stars/asterisks* on both sides. You may narrow the search to a **Region** or **Project Type**. NMA is now NOC.

10 Click on your **Project Number**

Project Manager

- Text
- Responsibility
- Priority/Type/Reason
- Grouping/Search Field
- Status
- Sold-to Party
- Archive
- Project Manager**
- Initiative Details

Search Result

Name	Project Number	Proj. Type	Region	Work Category	Project Manager
AC SH29 RS42	60045583	NMA	Waikato	Sealed pavement	KERMITF
Bay Bridge SH939	60035707	Improvement	Auckland	Bridge replacem	BUGSB

2. DEFAULT PHASES FOR DIFFERENT PROJECT TYPES

When an Item has had its funding approved, the Item has a corresponding SAP Project created. The SAP Project will have a set of default SAP Phases depending on the Project type as detailed in Table 1.

Table 1: Default Phases Created by SAP

For this Initiative:	If you create the following Item/Project type:	Then SAP will create these default Phases:	Additional Instructions or Notes:
Programme Business Case	▲ Programme Business Case	☞ Fees ☞ NZTA Managed Costs	PBCs may be referred to its former name as 'Studies'. A PBC is a capital project
Improvements	▲ Indicative Business Case ▲ Detailed Business Case ▲ Pre-Implementation ▲ Construction ▲ Post Implementation	☞ Fees ☞ NZTA Managed Costs ☞ Property Fees (DBC & IBC only) ☞ Physical Works (Construction only) ☞ Contingency (Construction only)	All Improvement Initiatives are capital projects
	▲ Property	☞ Acquisitions	The Property Project is linked to SAP Real Estate Module
Emergency Works	▲ Emergency Works	☞ Fees ☞ NZTA Managed Costs ☞ Physical Works	For Emergency Works, you manage your financials at the Phase level (not the Task level)
Minor Improvements	▲ Minor Improvements	☞ NZTA Managed Costs	This is now referred as Low Cost Low Risk (LCLR). It captures many projects under \$1 million. Each work is a Phase under LCLR Initiative for the region.
Maintenance	▲ Each region has an Item/Project	☞ Each maintenance work category has a default Phase	You do not need to create Maintenance Initiatives, Items/Projects and Phases. These were already created.

Note: Don't confuse SAP Phases to TIO Phases.

3. CREATE OR EDIT A PHASE (FOR CAPITAL PROJECTS ONLY)

Project: Project Name 7 Save your new or edited Phase

Save | Read Only | Print Fact Sheet | Export Project... | Create Version | User Settings...

60052033 | Level of Severity No Value Set | Status Created - Released | Responsible

2 Select 'Phase' from dropdown list here and click **Create** button

Project Name > Phase Name Hierarchy

This line shows the hierarchy relationship of project, phases, tasks or checklists

Phase Create | Include | Delete | Schedule | Add to Favorites | Copy to Forecasted | Language: English

4 When you've completed **Basic Data** tab, click this **Phase Analysis** tab where you can set or change the AIP workflow.

1 Select and highlight the topmost Project row. This will place the Phase under that Project

3 Complete the Phase Name, Phase Type, and Description

6 To edit an existing Phase, click the lefthand column to highlight the row. You can also move the rows by dragging from this side column.

This is the ID/WBS number for the Phase. Phase starts with 6xx. It is different number to the parent Project ID number or other Phases

Symbols
 Triangle - Project
 Arrowhead - Phase (Capital Project only)
 Pentagon - Checklist
 Circle - Task (NOC/MOR only)

5 Assign a Phase Manager here, and it will appear in their Accruals and Forecasting screen

Optional: Select or reassign these fields for your Phase. Then click **Save**

Basic Data | Portfolio Data | Notes | Documents | Object Links | Authorizations | NZTA Phase Analysis

General

Name: Number: 60052057

Phase Type:

Description:

Dates

Status

Status:

Change Status: Status Management

Basic Data | Portfolio Data | Notes | Documents | Object Links | Authorizations | NZTA Phase Analysis

AIP Team Administration Group: Wellington Capital Works

Phase Manager:

DFA:

AIP Certifier:

Region: Wellington

Work Category:

Phase Manager name:

DFA Name:

Certifier name:

Item Type:

4. CREATE OR EDIT A TASK (FOR NOC/MOR ONLY)

Project: 60032581 | Level of Severity: No Value Set | Status: Released | Responsible: [Name]

1 Click the on left side column of the Phase (Arrowhead shape) you want the Task to be under. You can also move the rows by dragging from this side column.

2 Select **Task** from dropdown list here and click **Create** button

3 Complete the Task Name, Task Type, and Description

4 When you've completed **Basic Data** tab, click the **Task Analysis** tab where you can set or change the AIP workflow.

5 Any fields marked with an asterisk is required

6 Save your new or edited Task

Don't create Tasks for Capital Projects

For Maintenance Projects charge costs to Task level not Phase level

This line shows the hierarchy relationship of Project, Phase, Tasks or Checklists

This is the ID/WBS number for the Task. Tasks starts with 6xx. It is different number to the parent Project ID number or other Tasks

Symbols
 Triangle - Project
 Arrowhead - Phase (Capital Project only)
 Pentagon - Checklist
 Circle - Task (NOC/MOR only)

Assign a Task Manager here, and it will appear in their Accruals and Forecasting Screen

This Work Element ID drop-down list is determined by the Work Category

Basic Data | Portfolio Data | Notes | Documents | Object Links | Authorizations | Subtasks | **NZTA Task Analysis**

General
 Name: New Task | Number: 60032585
 Task Type: [Dropdown]
 Description: [Text Area]

Dates
 Status: [Dropdown]

Status
 Change Status: [Dropdown] | Status Management

AIP Team Administration Group: Tasman Maintenance
 Task Manager: * [Dropdown]
 Work Element ID: * OC_Routine bridge maintenance (114A)
 DFA Name: [Text Field]
 Certifier name: [Text Field]
 Item Type: NOC

Work Category: Structures mainte
 Task Manager name: [Text Field]
 DFA: [Text Field]
 AIP Certifier: [Text Field]
 Region: * Tasman
 Task Type (Reporting): [Text Field]

5. RELEASE A PROJECT (FOR NOC/MOR ONLY)

Maintenance projects must be manually released after they are created. This doesn't apply to capital projects.

Screen: Project <Project Name>

The screenshot shows the SAP PPM Project screen with the following callouts:

- 1 Click the left side column to highlight the Project (triangle) to release.
- 2 Click the **Basic Data** tab
- 3 In the **Change Status** dropdown list, select **Release**
- 4 Click **Save** button on top-left of the window to release the project

The interface includes a 'Save' button at the top left, a 'Project Element' table on the left, and a 'General' tab on the right. The 'Basic Data' tab is selected, showing fields for Name, Project Type (NMA), Description, and Change Status (Release). The 'Change Status' dropdown is open, showing 'Release' as the selected option.

6. AUTHORISE EXTERNAL ORGANISATIONS TO ACCESS SAP PPM

Only give external organisations (e.g. consultants, alliances) authorisation for specific Phases/Tasks when we require them to enter Accruals and Forecasts.
 Note: Phases are used in capital projects. While Tasks are used in NOC/MOR works.

a. Start by Giving ‘Read Access’ to the Project for the External Organisation

Project: ABC2XYZ
 60052032

1 To get to this screen, go to your specific **Project** starting from the SAP Index Screen > Project Management > Projects

2 Click to select the **topmost** level of Project (triangle symbol) to give 'read' access to the whole project to the external user

3 Click **Authorizations**

4 Click **User Roles** tab (as in organisations), rather than individual Users tab

5 Click **Add**

	None	Admin	Write	Read
ZS_TA_PM_AUCKLAND_TRANSPORT	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
ZS_TA_PM_BECA_AKL	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
ZS_TA_PM_FLETCHER_CONST_AKL	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
ZS_TA_PM_INT_GEN_PERMISSIONS	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

6 Click this button to open the Search pop-up window

7 **OK**

8 Click **Read**

9 Click **Assign** and the external user role will be given **Read** authorisation

10 Check your external organisation has **Read** access to your whole Project

11 Click **Save**, to save your Project-level Read access authorisation for the external users. Then go to Step 12.

Be very careful to never delete or change this row for NZTA Internal Staff (ZS_TA_PM_INT_GEN_PERMISSIONS). Otherwise you will lock out everybody including yourself permanently

All Values: Role Name

Search Criteria

Role:

Description:

Restrict Number of Values

Start Search

Click **Start Search** (this is faster). Choose the region for larger organisations. Then click their name and **OK** button.

Role	Description
ZS_TA_PM_INT_GEN_PERMISSIONS	NZTA Internal General Permissions
ZS_TA_PM_J_HARRIS_CONSULTA...	J Harris Consultancy
ZS_TA_PM_JACOBS	Jacobs
ZS_TA_PM_JOHN_WOOD_CONSUL...	John Wood Consulting
ZS_TA_PM_KEVINLJ_ARCHAEOLO...	Kevin L Jones Archaeologist Ltd
ZS_TA_PM_MARSHALL_DAY_ACOU...	Marshall Day Acoustics
ZS_TA_PM_MAUNSELL_WLG	Maunsell Ltd Wellington

b. Give 'Write Access' to Particular Phases or Tasks for External Organisations

This part shows how to give Write-Access (or None) to Phases or Tasks for the applicable organisation.

Giving them write-access allows them to input Accruals and Forecasts. Whereas giving them no access, makes that Phase or Task inaccessible.

15 Click **Save**

12 Click the relevant Phase or Task that you want to give **Write** access

14 Tick **None** to make this Phase or Task inaccessible and hidden to the applicable organisation

13 Change this to **Write** for the applicable organisation of the selected Phase or Task

15 Repeat **Step 12** to give the external users Write access authorisation to any other Phase or Task.

You generally don't give external organisations any access to 'NZTA Managed costs'

Be very careful to never delete or change this NZTA Internal Staff (ZS_TA_PM_INT_GEN_PERMISSIONS). Otherwise you will lock out everybody including yourself permanently

Project Element	None	Admin	Write	Read	Evaluate	Account	Cand. Mngr
ZS_TA_PM_AUCKLAND_TRANSPORT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ZS_TA_PM_BECA_AKL	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ZS_TA_PM_FLETCHER_CONST_AKL	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ZS_TA_PM_INT_GEN_PERMISSIONS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note: Don't change the Project status to 'Lock'