SAP PPM User Guide – How to Update Projects

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

Document Control

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Approvals

Name	Designation	Date
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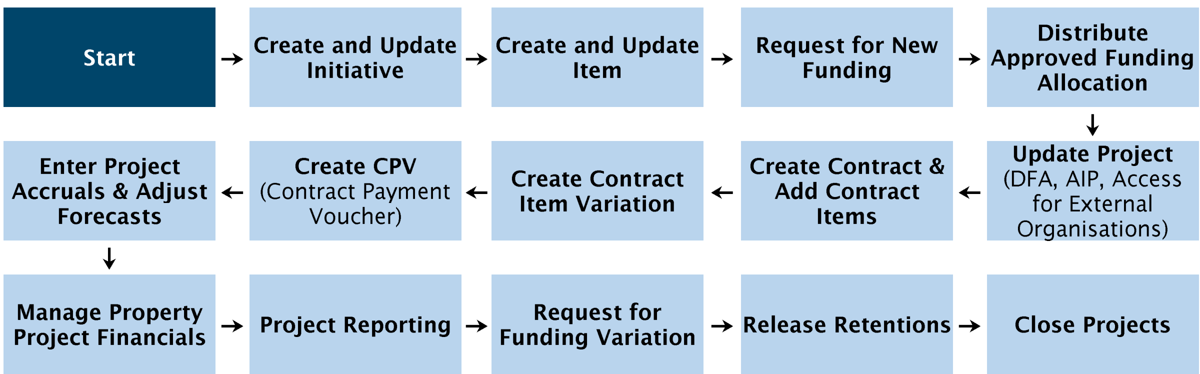
Revision History

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

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

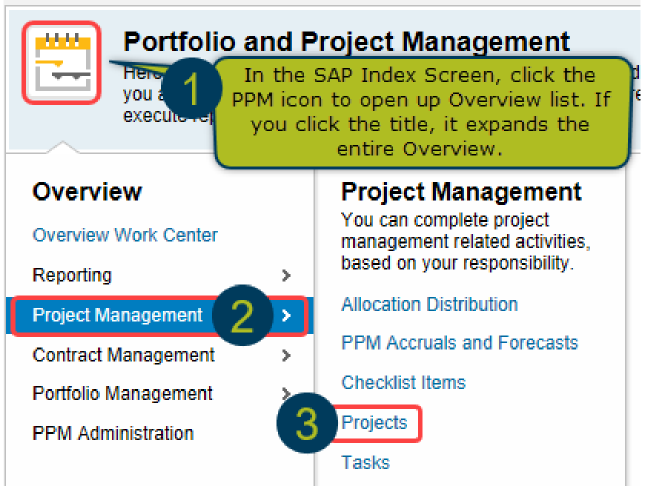
- Project Manager
- Contract Manager

Related Documents

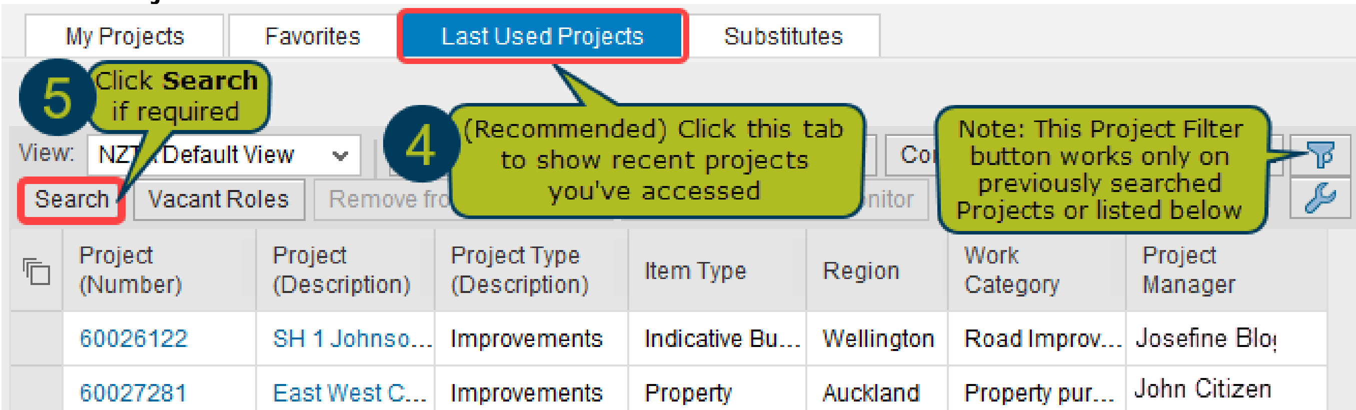
Automated Invoice Processing (AIP) User Guide
Chart of Accounts

1. OPEN OR SEARCH FOR A PROJECT

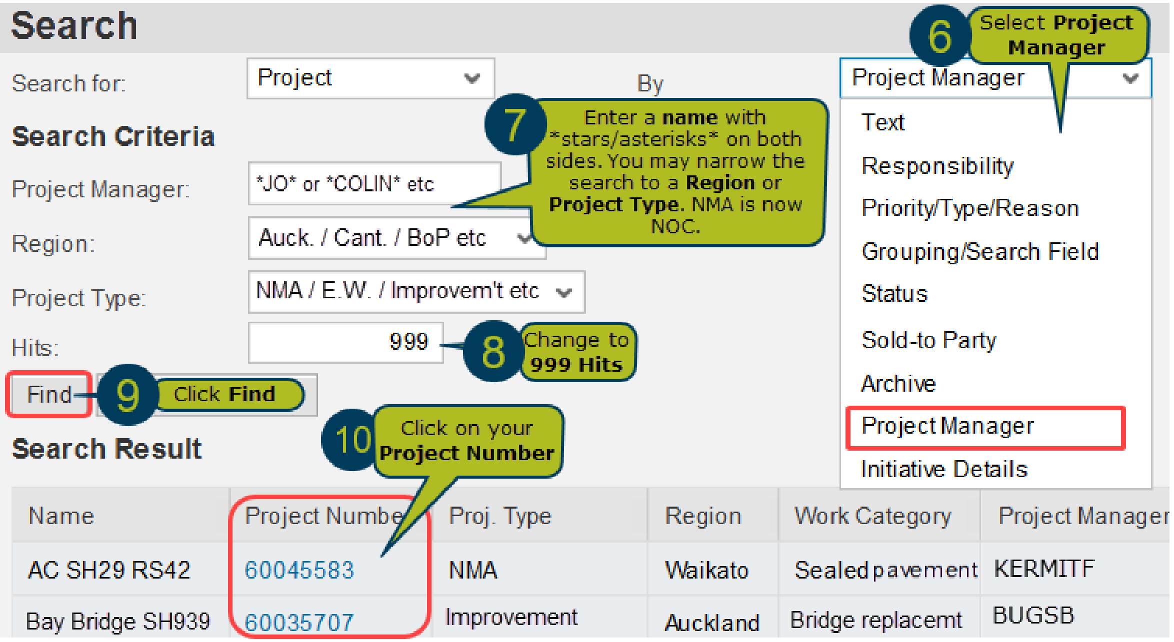
Screen: Index



Screen: Projects



Screen: Search



2. DEFAULT PHASES FOR DIFFERENT PROJECT TYPES

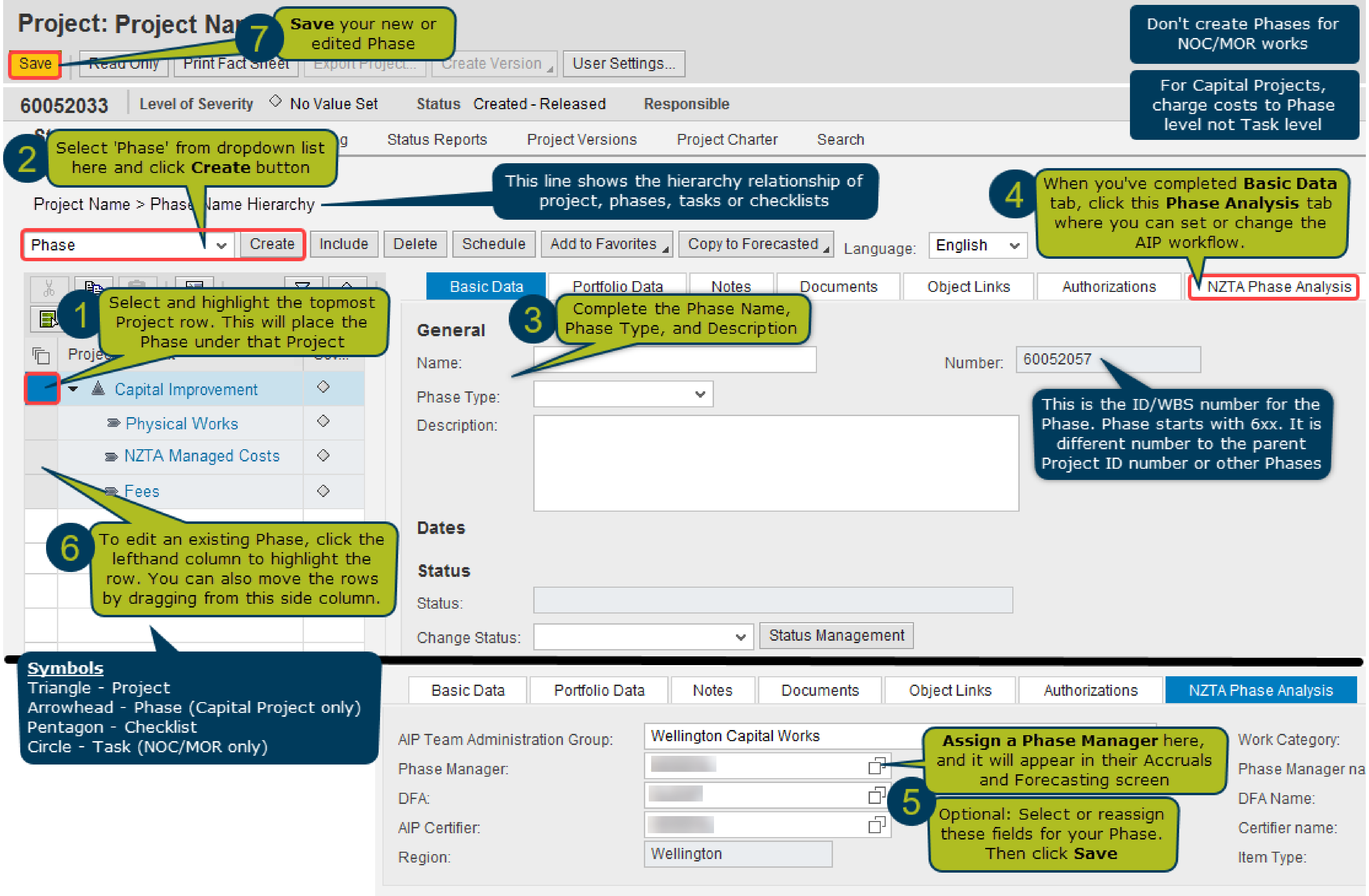
When an Item has had its funding approved, the Item has a corresponding SAP Project created. The SAP Project will have a set of default SAP Phases depending on the Project type as detailed in Table 1.

Table 1: Default Phases Created by SAP

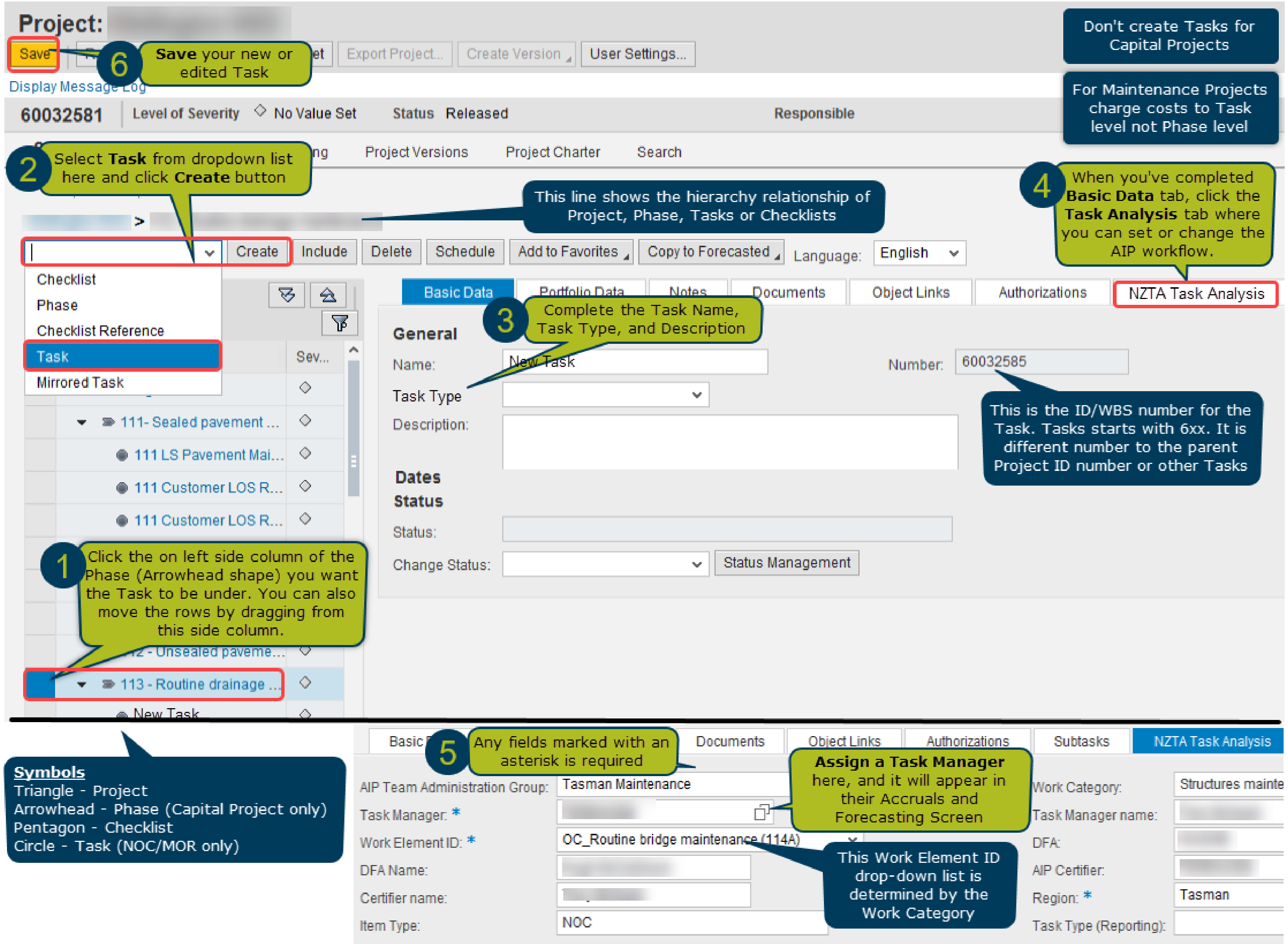
For this Initiative:	If you create the following Item/Project type:	Then SAP will create these default Phases:	Additional Instructions or Notes:
Programme Business Case	Programme Business Case	Fees NZTA Managed Costs	PBCs may be referred to its former name as 'Studies'. A PBC is a capital project
Improvements	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)



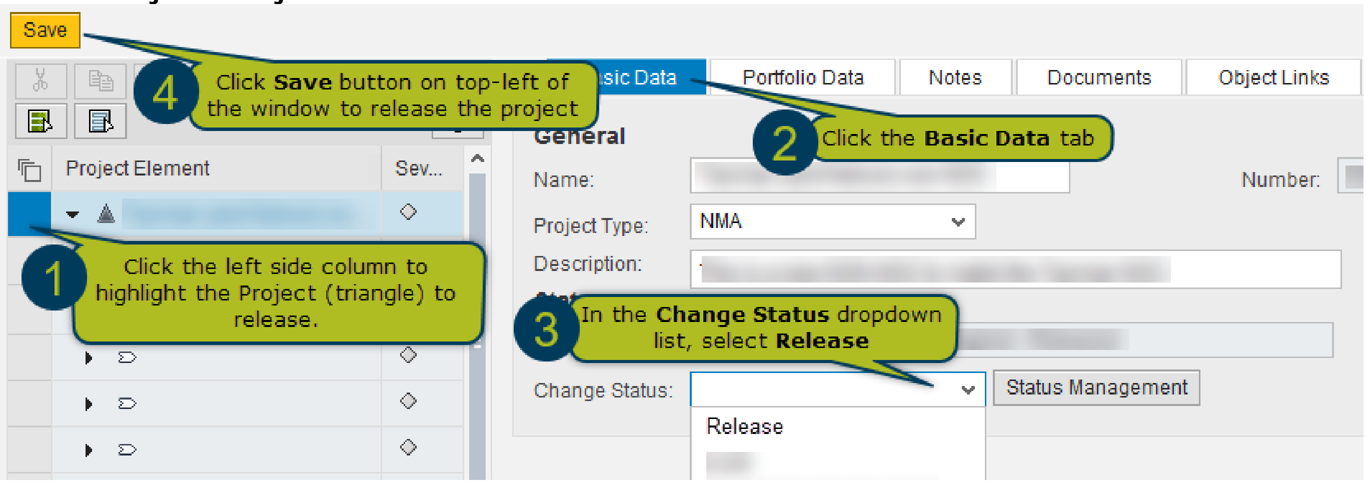
4. CREATE OR EDIT A TASK (FOR NOC/MOR ONLY)



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.

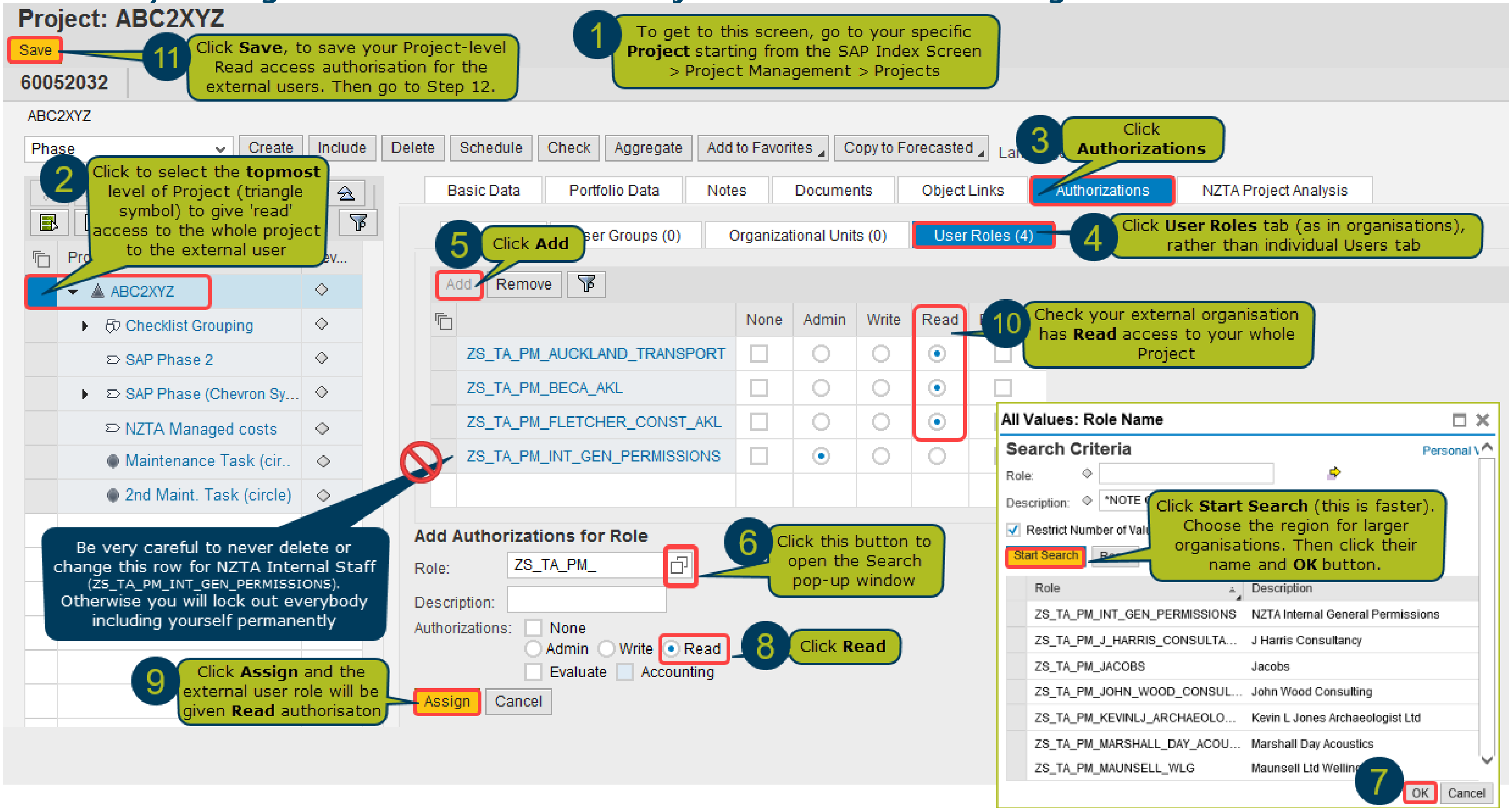
Screen: Project <Project Name>



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.

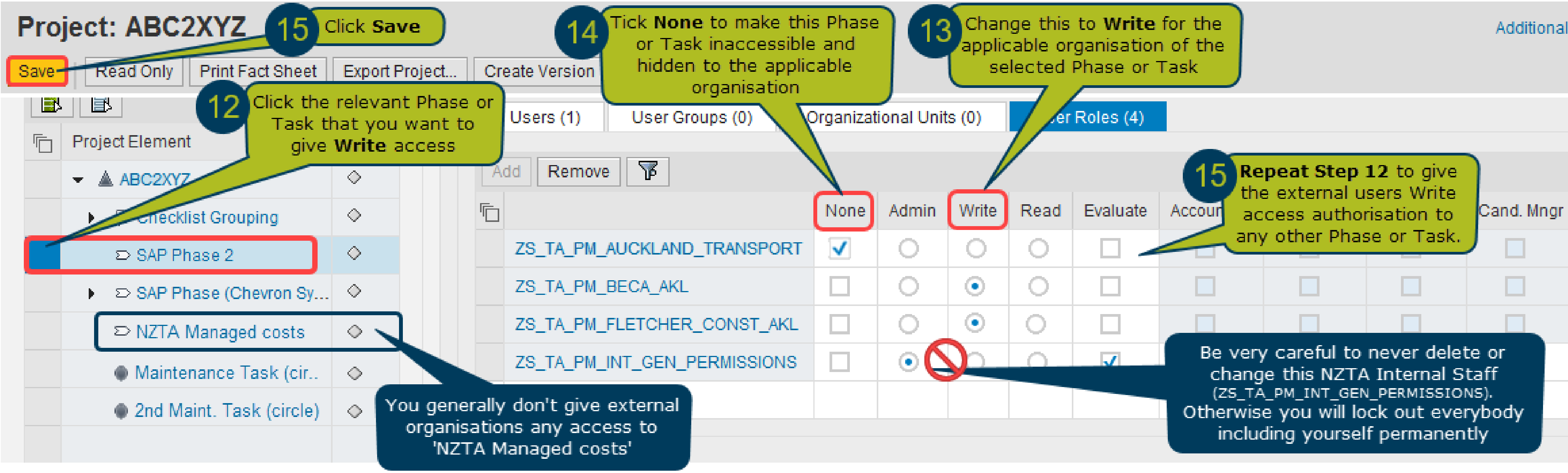
a. Start by Giving 'Read Access' to the Project for the External Organisation



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.



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