

# ERP-1365 Lock PS Budget at L1 WBS Element

Status	Approved
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Stakeholders	BIDALIA-ext, Kuldeep CONNELLY-ext, Delia UPADHYAY-ext, Anjali
Jira Request ID	<div style="border: 1px solid orange; padding: 5px;">  ERP-896 - Jira project doesn't exist or you don't have permission to view it.         </div>
Jira Development ID	<div style="border: 1px solid orange; padding: 5px;">  ERP-1365 - Jira project doesn't exist or you don't have permission to view it.         </div>

## High- Level Specification

Parameter	Value
Application System	S/4HANA - China instance SAP S/4HANA - Rest of World instance
Business Process Reference	10.02.02.02. Manage Project Budget and Forecasts

## Functional Overview

Project budget is approved through the Stage Gate Approval and Variation Approval workflows. After approval, the budget is automatically assigned to the PS project, at **level 1 (L1) WBS element** as the overall project budget, and at L2 when the PPM decision point is mapped with the PS project L2 (representing a phase). Users can re distribute the budget over the different lower WBS elements. However, users should not be able to modify in PS the total amount of total budget at L1.

## Scope and Objectives

The Fiori app *Edit Original Budget* is used to re distribute the budget. The approved budget on the PPM item is transferred to the PS project and is available at L1/L2 WBS element. The same budget can be re distributed throughout the lower WBS elements with the app. The purpose of this enhancement is to **prevent any manual change of the approved overall project budget** at L1 on the SAP PS project, while still allowing budget distribution and transfers below L1 (L2, L3, L4).

The standard application allows the user to edit the budget assigned at the L1. This goes against our approval process. This custom development will ensure the approved budget baseline cannot be altered outside the governance workflows. This is an authorization enhancement to grey out the L1 budget field and prevent any direct and indirect modifications to the L1 budget through the app's Total-Up and Copy functions.

The user will still be able to display the budget on L1 and distribute it across the lower levels.

The authorization restriction will apply to all PS projects, regardless of whether they are linked to a PPM Item. Since budgets are not managed for PS projects that are not associated with a PPM Item, this change will not cause any issues.

## Process Flow Diagram


Step	Description	Comment
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1	The user enters financial data in the SG Funding Request view for a specific PPM item within the PPM application.	This step initiates a budget request for a project.
2	The user submits the stage gate for approval in the PPM application, which starts an approval workflow involving multiple stakeholders.	This ensures that all relevant parties review the funding request.
3	Because the stage gate approval includes a funding request, the Delegation of Authority (DOA) approver is included in the approval process.	The DOA approver is responsible for authorizing budget allocations.
4	Once approved, the SG Funding Request is transferred to the Approved Budget financial view in PPM.	The Approved Budget view displays the total budget authorized for the project. Users can request additional funds via the stage gate or through a variation process.
5	After full stage gate approval, the Approved Budget is transferred from the PPM item to the Level 1 (L1) or L2 of the PS project.	This step ensures the approved budget is reflected in the project's SAP structure.
6	Based on the project's type and complexity, the budget may be further allocated to lower-level WBS elements using the Edit Original Budget app.	Budget distribution across WBS elements is allowed, but the total assigned to L1 must remain unchanged. A standard control ensures that the sum of distributed budgets does not exceed the L1 allocation.
7	Users are not permitted to modify the budget at L1. To request additional funds, a variation or a new stage gate approval must be initiated.	This maintains budget control and ensures all increases follow the proper approval process.

## Assumptions


PS projects that are not associated with a PPM Item have no budget assigned and therefore do not require any budget distribution.

## Dependencies

 ERP-655 - Jira project doesn't exist or you don't have permission to view it.

Stage Gate Approval Workflow - Enhancement:

Secure that the budget is approved and transferred from the PPM item to the PS project.

 ERP-166 - Jira project doesn't exist or you don't have permission to view it.

Variation Funding Approval - Additional budget

requested outside of the Stage Gate approval is approved and transferred to the PS project.

## Security, Integrity and Controls

This is an authorization restriction applicable for all roles/users involving the Fiori application Edit Original Budget, backend transaction code CJ30. Refer to Functional Requirements section for further details.

## Configuration Requirements

N/A

## Language Requirements

N/A

## Special Requirements

N/A

# Design Rationale

## Functional Requirements

- The *Edit Original Budget* app is used for distributing the project budget across WBS elements. The backend transaction code is CJ30.
- Currently, this app allows users to change the budget at the L1 WBS Element, both directly and indirectly (via Copy functions or Total Up).
- While it makes sense for the lower levels to remain editable, the L1 (highlighted in the above print screen) should not be editable.
- **Enhancement Requirements:**
  - Check if the SAP PS project is linked to a PPM item.
  - If so, the budget field for the L1 WBS Element must be set to display-only, preventing any direct manual updates.
  - The authorizations must also block any indirect changes to the L1 budget through the Copy functionalities.
  - Users must still be able to distribute the budget to lower-level WBS Elements (L2, L3, L4) as needed.
  - Any requests for additional budget at L1 must continue to follow the established Stage Gate or Variation Approval workflows, from the PPM item.

## Proposed Technology to Use

- **Enhancement:** CNEX0002
- **Exit:** EXIT\_SAPLCNAU\_002

## Data Source Considerations

N/A

Table	Field Name	Comments/Calculation/Field Manipulation
/RPM /ITEM_D	ID	Check that the SAP PS project exist in /RPM/ITEM_D.

## Data Validation Considerations

N/A

Table	Field Name	Comments/Calculation/Field Manipulation

## Custom Tables

N/A

## Master Data

N/A

Field	Description	Data Type/Length	Validation rule/ Value Help

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## Configuration Table

N/A

Field	Description	Data Type/Length	Validation rule/ Value Help

## Selection Screen Enhancement

N/A

Field Name	Description	Select:	Data Type/Length	Default Value/ Validation rule/ Value Help	Selection Logic

## Processing Logic

- The solution will be implemented as an authorization enhancement using:
  - Check that the PS project is connected to a PPM item:**
    - If the project id exists in table /RPM/ITEM\_D, then apply the below authorization restriction.
    - If not, no authorizations restriction
  - Enhancement:** CNEX0002
  - Exit:** EXIT\_SAPLCNAU\_002
  - Authorization object:** Custom authorization object
  - Authorization Control:** Restrict Activity 27 (Change), Allow Activity 28 (Display)
  - Only applied to the L1 in the PS project structure:
  - When Restrict Activity 27, then budget field for the L1 WBS Element must be set to change.
  - When Restrict Activity 28, then budget field for the L1 WBS Element must be set to display.

### Overall values

E...	Lev	WBS Element	Budget	Tra...	Current budget	Distributed	Distributable	Planned total V...	Release	CO ...
<input type="checkbox"/>	1	A-000031	150.000,00	EUR	150.000,00	150.000,00				EUR
<input type="checkbox"/>	2	A-000031-01		EUR						EUR
<input type="checkbox"/>	2	A-000031-02	100.000,00	EUR	100.000,00		100.000,00			EUR
<input type="checkbox"/>	2	A-000031-03	10.000,00	EUR	10.000,00		10.000,00			EUR
<input type="checkbox"/>	2	A-000031-04	40.000,00	EUR	40.000,00		40.000,00			EUR
<input type="checkbox"/>	2	A-000031-05		EUR						EUR

- This approach has been tested and confirmed to prevent both direct edits and changes via the copy and Total Up functionality which will cause a change at the L1 WBS Element.
- This restriction is applicable to all roles/users with access to the FIORI app Edit Original Budget and the backend t-code CJ30.

## Volumetrics

This is an authorization restriction on the SAP PS projects. The number of projects foreseen is currently unknown.

## Performance Considerations

This is an authorization restriction that does not affect system performances.

# Error Handling

There's no error handling because Error's are controlled by Authorization object.

# Testing

## How to Test

To be tested with a PS project linked to a PPM item with approved budget and a PS project not linked to a PPM item, with assigned budget.

From the Fiori app My Portfolio Items, a PPM item created. The PPM item allows to request or assign a budget to PS project via the Stage Gate approval or variation approval. It is recommended to use a PPM item already approved to validate the authorization restriction.

## Test Conditions and Expected Results

ID	Condition	Expected Result
1.1	<b>PS project linked to a PPM item:</b> Select a PPM Item already approved (first Stage Gate approved) with Approved Budget assigned.	In the Financial plan, the view Approved Budget must have some figures populated.
1.2	Open the app Edit Original Budget and enter the PPM item id, which corresponds to the SAP PS id.	The total budget approved and displayed on the PPM item is assigned to the L1 structure (Project level) in the app. The L1 Budget should be greyed out and not possible for direct edit.
1.3	Distribute the amount amongst the lower levels of the project structure.	The app allows budget distribution.
1.4	Distribute an amount > Budget displayed on L1.	A standard error prevents the saving.
1.5	Distribute an amount > Budget displayed on L1. Go to Menu Edit Total-Up. Save.	The saving is not allowed, as Total Up changes the original L1 figure.
1.6	Select a line and go to Go to Menu Edit Copy. Select Current Budget and Add 100%. Save.	The saving is not allowed, as Total Up changes the original L1 figure.
2.1	<b>PS project not linked to a PPM item:</b> Open the app Edit Original Budget and enter a SAP PS project id, not linked to a PPM item.	The L1 Budget is editable.
2.2	Modify the amount by editing the total budget cell directly. Save.	System allows saving.
2.3	Modify the amount by changing the figures in the lower levels (L2, 3..) to a higher amount than the L1 budget. Save.	System recalculates the total budget at L1.
2.4	Modify the total budget amount via the Menu Edit Total-Up functionality.	System recalculates the total budget at L1.
2.5	Modify the total budget amount via the Menu Edit Copy.	System recalculates the total budget at L1.

## Test Considerations/Dependencies

N/A

## Other Information

# Development Details

## Package

Package Name	Parent Package

## Enhancement Implementation

Enhancement Type	Standard Definition Name	Custom Implementation Name	Design Rationale Reference

## Other Development Objects

Object Type	Object Name	Purpose/High Level Logic	Design Rationale Reference

## Appendix

### Custom Authorization Group Naming Convention

This table is based on the Syensqo development standards document. It provides the naming conventions for authorization groups to associated with custom reports and tables to comply with security requirements.

<b>ABAP</b>	ZFI	ZMM	ZPS	ZCO	ZSD	ZBC	ZFI	ZCA
<b>TABLES</b>	ZFIT	ZMMT	ZPST	ZCOT	ZSDT	ZBCT	ZFIT	ZCAT

## See also

**File**   **Modified**

No files shared here yet.

## Change log

Version	Published	Changed By	Comment
<b>CURRENT (v. 17)</b>	<b>Mar 24, 2026 10:27</b>	<b>FRUTEAU-ext, Sabrina</b>	
v. 16	Mar 24, 2026 09:53	FRUTEAU-ext, Sabrina	
v. 15	Mar 24, 2026 09:33	K N-ext, Manjunath	
v. 14	Mar 24, 2026 09:17	FRUTEAU-ext, Sabrina	
v. 13	Mar 24, 2026 09:12	FRUTEAU-ext, Sabrina	
v. 12	Mar 24, 2026 09:10	FRUTEAU-ext, Sabrina	

v. 11	Mar 24, 2026 08:58	<a href="#">FRUTEAU-ext, Sabrina</a>
v. 10	Mar 24, 2026 08:58	<a href="#">WEINERT-ext, Patrick</a>
v. 9	Mar 24, 2026 04:55	<a href="#">K N-ext, Manjunath</a>
v. 8	Mar 20, 2026 08:30	<a href="#">K N-ext, Manjunath</a>

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## Workflow history

This view shows the 5 most recent entries. The complete workflow log is available from the 'Document Activity' menu item.

Apr 15, 2026	Actor	Type	Activity	Version
<a href="#">Approved</a>	<a href="#">UPADHYAY-ext, Anjali</a>	State	changed state to <a href="#">Approved</a> at 7:42 am	v17
<a href="#">Lead Approval</a>	<a href="#">UPADHYAY-ext, Anjali</a>	State	gave <i>POD Lead Review</i> approval at 7:42 am	
<b>Mar 26, 2026</b>				
	<a href="#">JAIN-ext, Dhiraj</a>	State	changed expiry date to '02 Apr, 2026 04:27 am' at 5:27 am	
		State	changed state to <a href="#">Lead Approval</a> at 5:27 am	v17
<a href="#">Tech Review</a>	 <a href="#">JAIN-ext, Dhiraj</a>	State	gave <i>Tech Review</i> approval at 5:27 am	
<b>From Mar 20, 2026 to Mar 24, 2026</b>				
	<a href="#">K N-ext, Manjunath</a> , <a href="#">WEINERT-ext, Patrick</a> and <a href="#">FRUTEAU-ext, Sabrina</a>	Edit	multiple updates from  <a href="#">K N-ext, Manjunath</a> , <a href="#">WEINERT-ext, Patrick</a> and  <a href="#">FRUTEAU-ext, Sabrina</a>	