

Create Property Record – Investigation (PM5.1)

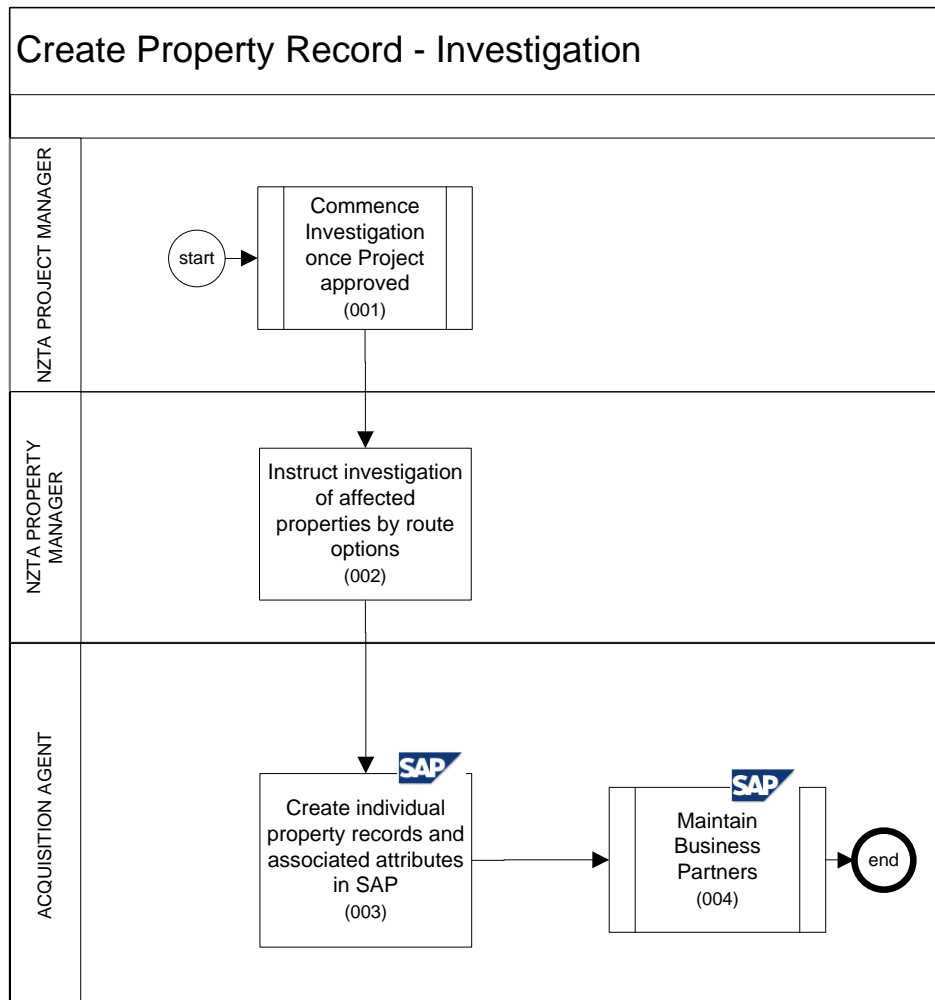
This process details the steps required to create a Property record during the Investigation stage of the Initiative (an Initiative is a Project in the SAP structure). Property records may be created at the commencement of the investigation of a roading Initiative or as part of preparing the approved property acquisition strategy (a separate business process). Property records may be created for properties NZTA is interested in gaining access to but not necessarily purchasing.

At the Investigation stage, property records are generally only created when it is useful to start collecting information in SAP. This could be because of interaction with the landowner is required. If interaction is not required the information on a ‘group’ of properties may be kept by the Consultant but not captured in the system.

Note: Any property fees or costs (for a group of properties or an individual property) at the Investigation stage are to be charged to the Initiative and not to the Property Project Work Breakdown Structure (WBS). This will normally take place by invoicing NZTA, which is processed outside of the Property module. The Acquisition Agent or other Suppliers will need to know the Investigation WBS number to include on invoices.

Process flow diagram

The process flow is shown below.



Process steps

The steps for this process are detailed below.

Step	Action
1.	An NZTA Project Manager commences the Investigation following NZTA approval. Note: Refer to the HNO Portfolio, Project and Asset Business Process Design document for Project approval.
2.	An NZTA Property Manager instructs the Acquisition Consultant to investigate properties affected by route options.
3.	An Acquisition Agent creates individual property records and attributes for properties where they have had to engage with landowners or are collecting property information that should be stored in SAP. This is done using transaction RE80 (refer to the RE80 (Create Property - Investigation) transaction guide for more details).
4.	The Acquisition Agent must follow the Maintain Business Partner business process in order to create a Business Partner type of 'Property Owner' & 'Acquisition Consultant'. It is also possible this Business Partner may already have other Business Partner roles within SAP (i.e. add to the existing record). This is completed from within the RE80 transaction during the previous step. Refer to the RE80 (Create Business Partner) transaction guide for more detail.

Property Objects created through Investigation stage of an Initiative will have attributes that must be subsequently maintained through the property's life cycle. The involvement of the Property module in this process is to record properties likely to be acquired and record against these key data, such as a diary of interaction, owner and agent details, valuations, notes and store documents.

At this stage forecasts are generally not recorded at the property level. Forecasts and timing information is kept by the NZTA Project Manager or Project Consultant at a project-wide level.

Investigation frequently involves entering onto land temporarily – a project type (temporary occupation) exists for this.

Business rules

The following business rules apply:

- The Investigation Project must have been created and approved to be able to put property investigation costs against it.
- If it is clear that the property will be acquired at some stage, the property will be created as a property in SAP and any entry will be recorded with that property. If purchase is not certain an entry must be created as a temporary occupation.