RE80: Create Property Object (Purchase Approved) Transaction Guide

This transaction shows you how to use RE80 (Real Estate Navigator) to create an architectural object for an approved Property Project (e.g. for a property that is being purchased that has not previously been set up as an Investigation property object/record). This is part of the PM5.2 Create Property Record - Purchase Approved process.

Use either the short description quick-step procedure set out below or refer to the more detailed description with screen shots which follows.

Access the transaction using either:

- transaction code **RE80**, or
- the menu path: **Real Estate Management** > **Master Data** > **Architecture Master Data** > **Process Architectural Object**.

Quick-step procedure

Follow the steps below to complete this transaction.

Step	Action
1.	On the **Object Overview** tab, select **Architectural Object** from the drop down list, then click the **Create** icon.
2.	Complete the **Arch. Object Type** (e.g. **01PR**) field in the **Create Architectural Object** dialog box and press Enter. **Result**: The **Architect. Object Property <NEW> Create: General Data** screen displays.
3.	Do the following in the **Address** section: • Complete the Description field (e.g. John Jones 21 Highbury Avenue). • Click the **Create New Address** icon. (The **Create Address for Object AO <New>** dialog box displays.) **Note**: Press Tab to complete the following field. Do not press Enter until all fields are complete. • Enter the Country, Region, City, Suburb, Street, House Number (e.g. NZ, Wlg, Wellington, Highbury Ave, 21). • Press Enter. The **Create Address Architectural Object** dialog box displays the detail you have just entered. • Press Enter to return to the **Architect. Object Property <NEW> Create**: **General Data** screen.
4.	Complete the following fields in the **Property Reference Data** section: • Acq./Disposal Status (e.g. Awaiting Purchase Instruction). • Legacy Number (e.g. PADS 42111). • Management Status (e.g. Not Purchased Yet). • Main Usage Type (e.g. 35 Residential Unimproved). **Note**: After completing the Address details, the system may default an error message requiring you to complete the Mgmt. Profit Centre field before completing the other fields.
5.	Complete the User Status (e.g. ACQ – Acquisition) in the **Status Display** section. (To change this, click the **Change User Status** icon (the pencil), and search for/select INV – Investigation.)

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Step	Action
6.	Complete the following fields in the **Control** section (if required): • Location (e.g. 00124 Wellington). • Mgmt. Profit Center (e.g. 7009 Wellington). • Valid From (e.g. today's date or 01.01.1900).
7.	Complete the following fields in the **Legal Description** section: • Current Title (tick box if current title). • LINZ parcel ID (e.g. LINZ 9999ABC). • Roll Number (e.g. 98989898). • Title Reference (e.g. Computer Freehold Register Reference - CFR CB/222 or GAZ 2008 p115). • Appellation (e.g. Lot 11 DP 10043).
8.	Complete the following fields on the **Additional Data** tab (the options on this tab will vary depending on the type of object selected): • Maintenance Level (e.g. 00012 Maintain at current level). • Building Condition (e.g. 03 Good). • Main Usage Type (e.g. 35 Residential Unimproved).

9.	Do the following on the **Partners** tab:
	• Click the **Assign New Partner** icon.
	• Select an option from the drop-down list (e.g. Mandatory partners for Acquisition are: NZTA Acquisition Manager, Property Acq. Company, Property Acq. Consultant and Owner).
	• In the **Business Partner Search** dialog box that displays, either:
	  ○ Use **Find in Role** to find an existing partner (e.g. NZTA Acquisition Manager Stephen Cottrell), or
	  ○ Select **Create in Role** and enter the new details for the person/organisation (e.g. Owner: John Jones). Refer to the RE80 (Create Business Partner) transaction guide for more detail.
	• Complete the Start reltnship date field (e.g. 17.05.2013). The start field date must match the validity date of the object specified in step 6 otherwise it will not save the record.
	• Repeat the steps above for each additional role to be added.
	Note: If you click **Save** without selecting the mandatory partners, the system will display an error message at the bottom of the screen prompting you to choose a partner (or partners) that corresponds to the **User Status** selected in step 5 (e.g. ACQ - Acquisition).

10.	Complete the following mandatory fields in the **Measurements** tab: • Note the Gross floor Area (PGFA) (e.g. 130 m^2). • Note the Required Land area (PLAR) (e.g. 0.0350 HA). • Note the Total Ground Area (PTGA) (e.g. 0.0350 HA). Select and note any other relevant measurement types such as: • V002 NZTA Land Value Full (e.g. 880,000 NZD). (Note that V001 NZTA Valuation Full automatically updates with the V002 NZTA Land Value Full amount.) • V030 Rateable Valuation (e.g. 890,000). • V031 Rateable Land Value (e.g. 900,000).

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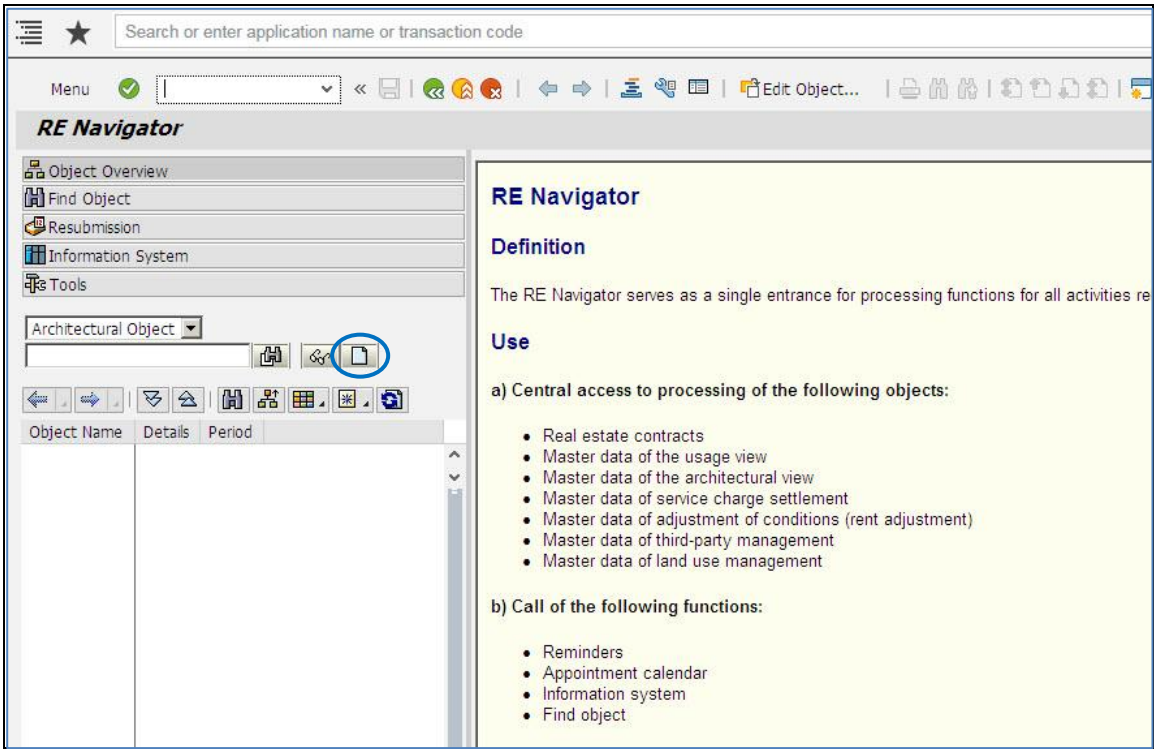
Step	Action
11.	Do the following in the **Alerts/Milestones** tab, if required: • Click the **Create Reminder Rule** icon. • Select either 'One Time occurrence' or 'As of date...'. • Enter a Resubmission Reason and Date in the **Create Reminder Rule** dialog box (e.g. Agreement Construction Entry 27.05.2013). • Press Enter.
12.	Click **Save**. The message *'Architectural object ID no 88****** has been created'* displays in the bottom left-hand side of the screen. **WBS Assignment**: Once the record is saved the WBS numbers are auto-created and can be displayed/changed by going into the Assignments tab. • WBS Prefix for ACQ – 87. • WBS Prefix for MGMT – 88 (will be the same as the AO number). • WBS Prefix for DISP – 89.

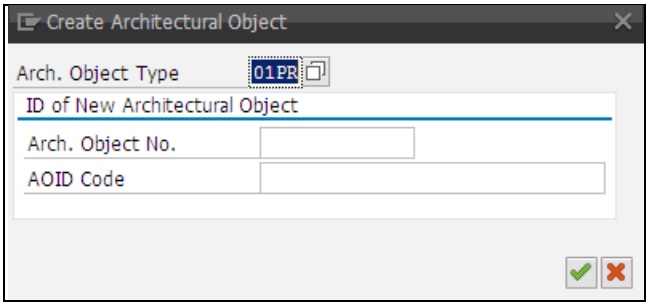
Detailed procedure

Follow the steps below to complete this transaction.

1. On the **Object Overview** tab, select **Architectural Object** from the drop down list, then click the **Create** icon (circled below).



2. Complete the **Arch. Object Type** (e.g. **01PR**) field in the **Create Architectural Object** dialog box and press Enter.



Result: The **Architect. Object Property <NEW> Create**: **General Data** screen displays.

3. Do the following in the **Address** section:

Field	Description
Description	Enter a description of the property (e.g. Owner John Jones 21 Highbury Avenue).
Address	Do the following: • Click the **Create New Address** icon. (The **Create address for Object AO <New>** dialog box displays.) • Press Tab to complete the following fields or use the mouse to enter the address details. Do not press Enter until all fields complete. • Enter the Country, Region, Postal Code, City, Suburb, Street, House Number (e.g. NZ, Wlg, Wellington, Brooklyn, Highbury Ave, 21). • Press Enter. (The **Create Address Architectural Object** dialog box displays the detail you have just entered.) • Press Enter to return to the **General Data** tab of the **Architect. Object Property <NEW> Create**: **General Data** screen.

4. Complete the following fields in the **Property Reference Data** section:

Field	Description
Acq./Disposal Status	Current status of the property (e.g. select 'Acquisition in progress'
Full/Partial Purch.	Indicates the purchase quantity or Financial Interest in a property (e.g. 100 Land all).
Property Interest	Description of the ownership type of a property (e.g. 10 Freehold).
Legacy number	The legacy system PADS and/or OPM references may be stored in this field separated by a " ," or supplier references (e.g. PADS42111).
CPC file Ref.	Crown Property Clearances (LINZ ID) (e.g.191919A).
Management Status	Description of the current status of the property for NZTA (e.g. Not purchased yet).

Note: After completing the Address details, the system may default an error message requiring you to complete the Mgmt. Profit Centre field before completing the other fields.

5. Complete the following fields in the **Status Display** section:

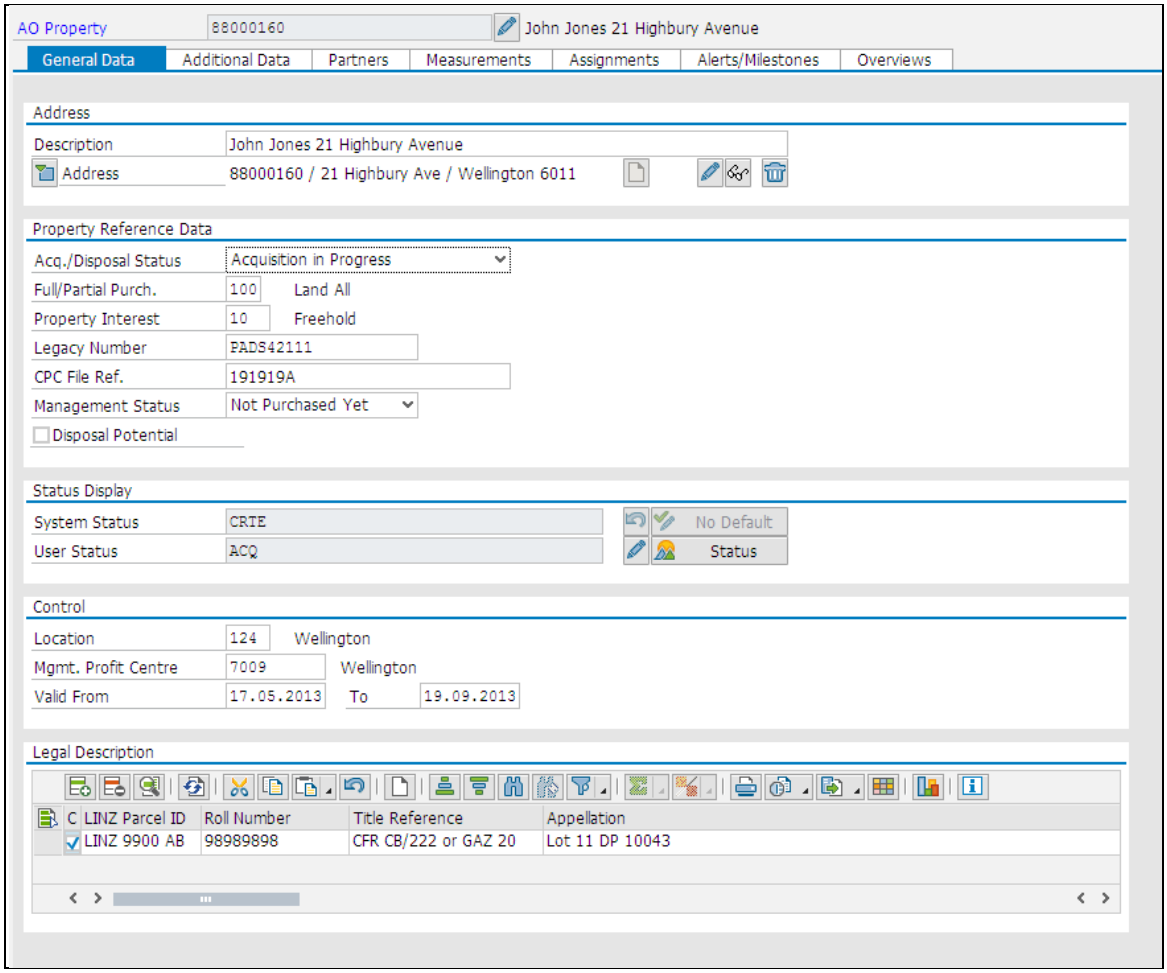
Field	Description
User Status	Describes the status of a property (e.g. ACQ – Acquisition). (To change this, click the **Change User Status** icon (the pencil), and search for/select INV – Investigation.)

6. Complete the following fields in the **Control** section (if required):

Field	Description
Location	Region that is managing the property (e.g. 124 Wellington).
Mgmt. Profit Centre	The Management Profit Centre is the Profit Centre adopted in the automatic creation of the accounting object. It is essential that this field is correct from the initial creation of the Investigation Property record, and at the time the user status is updated to Management, the trigger point for creation (e.g. 7009 Wellington). **Note**: Subsequent updates of this field after creation does not update the Profit Centre on the Accounting object.
Valid From	The date from which the Property Object Record is created in SAP (e.g. the date entering the information today 17.05.2013 or 01.01.1900). **Notes**: • To enable accurate calculations of management fees, this field should be populated with the date range from: 01.01.1900 and To 31.12.9999 (or leave the To field blank which equates to 31.12.9999). • The Partners tab must also contain the exact same start dates otherwise it will not save.

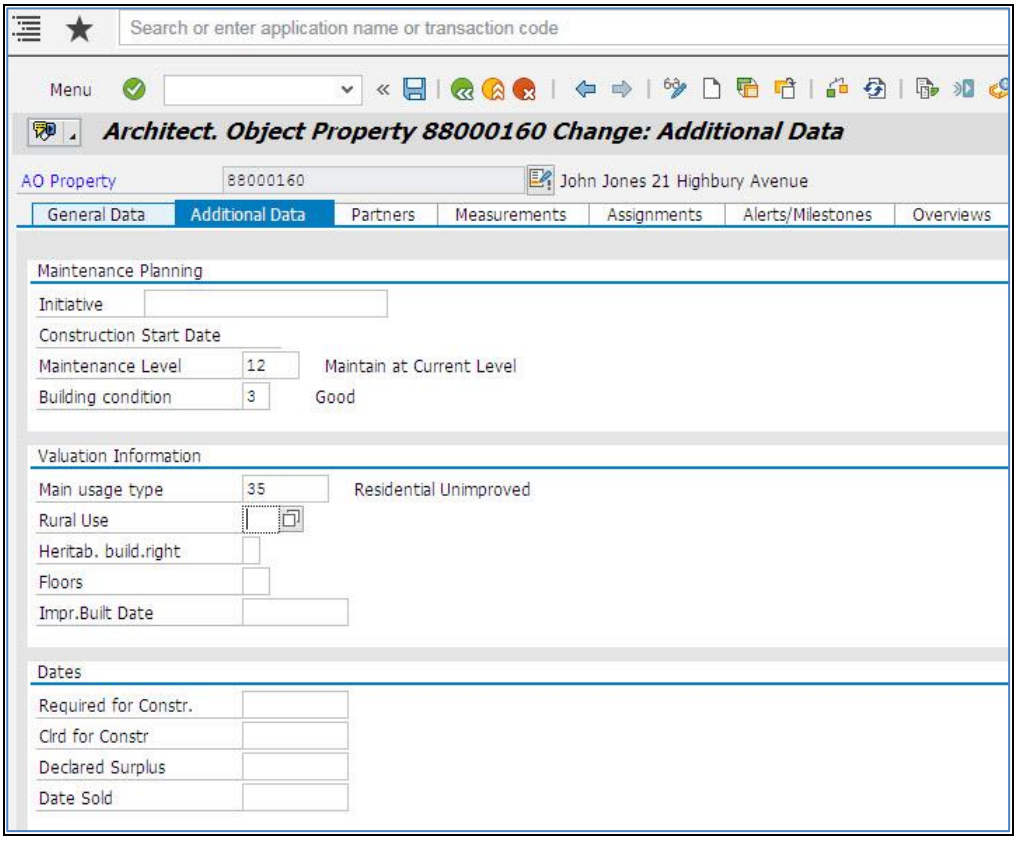
7. Complete the following fields in the **Legal Description** section:

Field	Description
Current Title (tick box)	Select if the Appellation and Property Titles are current.
LINZ parcel ID	The LINZ reference title of the property (e.g. LINZ 9900 AB).
Roll Number	Name of the development plan (e.g. 98989898).
Title Reference	The Computer Freehold Register Reference (e.g. CFR CB/222 or GAZ 2008 p115).
Appellation	Legal name/description of the property (Lot 11 DP 10043).



8. Complete the following fields on the **Additional Data** tab (the options on this tab will vary depending on the type of object selected):

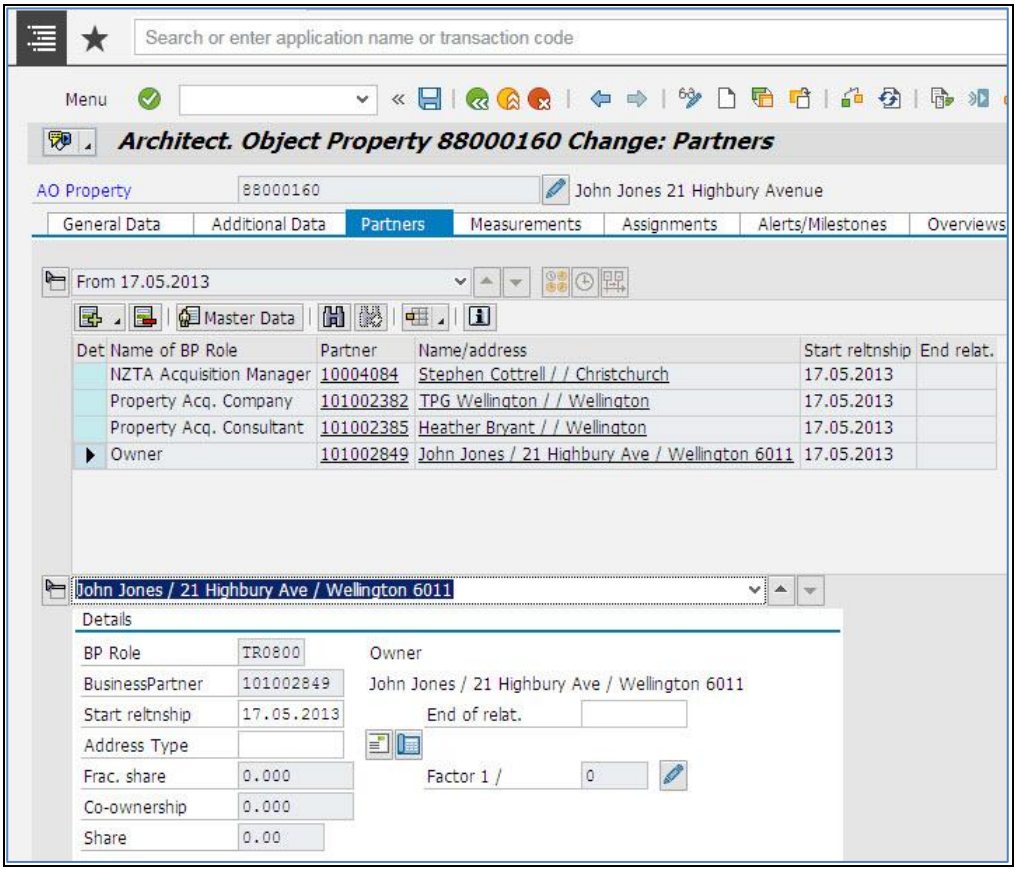
Field	Description
Maintenance Level	Indicates the approach taken to maintaining the property (e.g. 12 Maintain at Current Level).
Building Condition	Indicator for the general state of the building (e.g. 03 Good).
Main Usage Type	Describes the main usage for the property (e.g. 35 Residential Unimproved).



9. Do the following on the **Partners** tab:

   - Click the **Assign New Partner** icon.
   - Select an option from the drop-down list (e.g. Mandatory partners for Acquisition are: NZTA Acquisition Manager, Property Acq. Company, Property Acq. Consultant and Owner).
   - In the **Business Partner Search** dialog box that displays, either:
     - Use **Find in Role** to find an existing partner (e.g. NZTA Acquisition Manager Stephen Cottrell), or
     - Select **Create in Role** and enter the new details for the person/organisation (e.g. Owner: John Jones). Refer to the RE80 (Create Business Partner) transaction guide for more detail.
   - Complete the Start reltnship date field (e.g. 17.05.2013). The start field date must match the validity date of the object specified in step 6 otherwise it will not save the record.
   - Repeat the steps above for each additional role to be added.

   Note: If you click **Save** without selecting the mandatory partners, the system will display an error message at the bottom of the screen prompting you to choose a partner (or partners) that corresponds to the **User Status** selected in step 5 (e.g. ACQ - Acquisition).



10. Select the **Measurements** tab, then do the following:

- Click the **Add measurements** icon (circled in blue).
- Select measurement from the **Permitted Measurement types** dialog box.
- Click **Continue**.

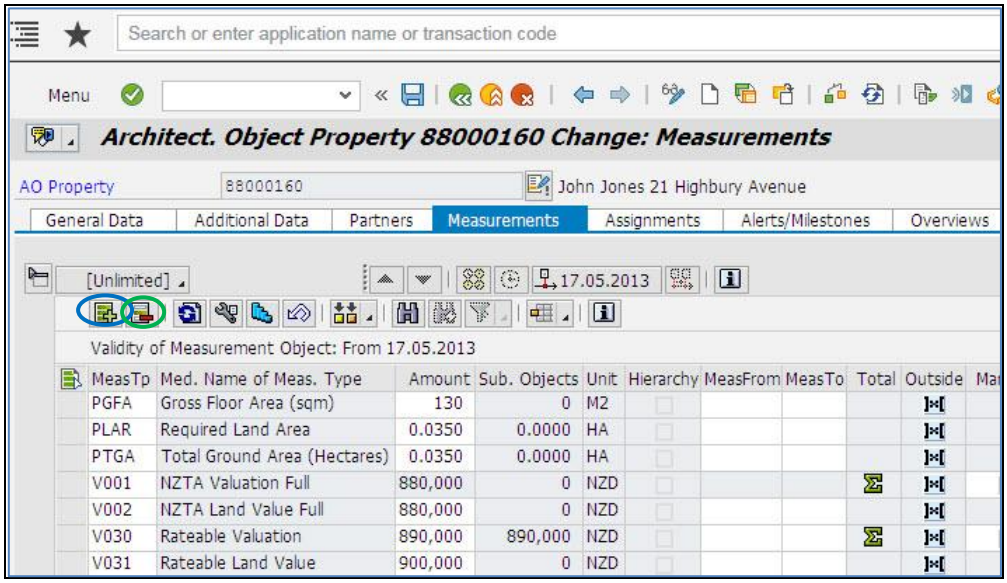
Enter the value in the amount column on the **Measurements** tab:

- Note the Gross Floor Area (PGFA) – Gross Floor Area (sqm) (e.g. 130 m^2).
- Note the Required Land area (PLAR) (e.g. 0.0350 HA) – mandatory field.
- Note the Total Ground Area (PTGA) (e.g. 0.0350 HA) – mandatory field.

Select and note any other relevant measurement types:

- V002 NZTA Land Value Full (e.g. 880,000 NZD). Note that V001 NZTA Valuation Full automatically updates with the V002 NZTA Land Value Full amount.
- V030 Rateable Valuation (e.g. 890,000).
- V031 Rateable Land Value (e.g. 900,000).

Note: You can delete a measurement type by selecting the line, then pressing the **Remove measurements** icon (circled in green).



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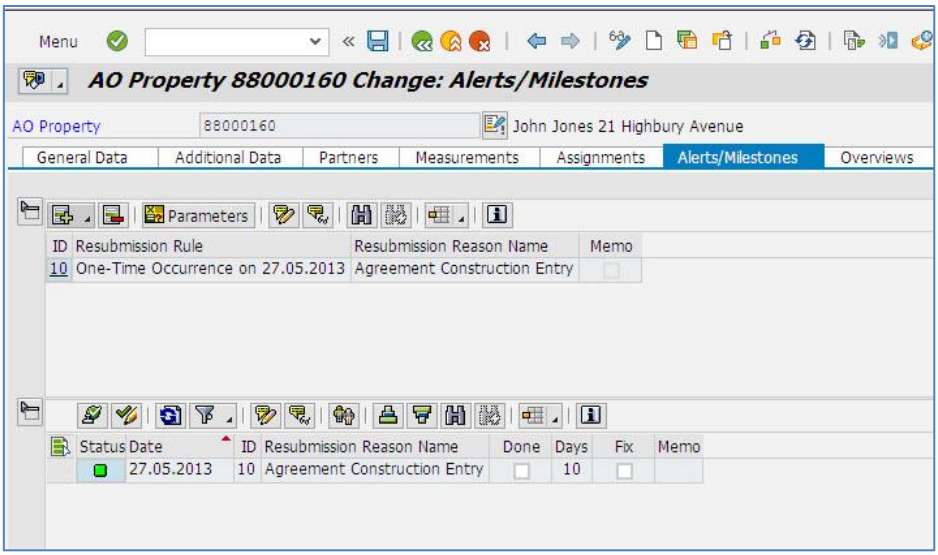
- Click the **Create Reminder Rule** icon.
- Select either 'One Time occurrence' or 'As of date...'.
- Enter a Resubmission Reason and Date in the **Create Reminder Rule** dialog box (e.g. Agreement construction Entry 27.05.2013).
- Press Enter.



12. Click **Save**. The message *'Architectural object ID no 88****** has been created'* displays in the bottom left-hand side of the screen.

Note: Once the record is saved the WBS numbers are auto-created and can be displayed and/or changed by going into the **Assignments** tab.

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