

RE80: Maintain Management Property Transaction Guide

This guide shows you how to use transaction RE80 (Real Estate Navigator) to update the details for an existing architectural property object/record that NZTA has acquired and is now being managed by the Property Manager. This is part of the PM7.1 – Lease Property process.

Use either the quick-step procedure below or the detailed procedure with screen shots which follows.

Note: The User Status should also be changed by the NZTA Property Manager as part of this procedure.

Access the transaction using either:

- transaction code **RE80**, or
- The menu path: **Real Estate Management > Master Data > RE Navigator > Find Object**.

Quick-step procedure

Follow the steps below to complete this transaction.

Step	Action
1.	Select Object Overview in the Navigation area.
2.	Select Architectural Object from the drop-down list, and then click the Find icon (Binoculars). Result: The Restrict Value Range dialog box displays.
3.	Select a suitable search (e.g. Architectural Object by ID): <ul style="list-style-type: none"> • enter search criteria (e.g. a description, or the person responsible), and • click the Find icon.
4.	Select an architectural object (property) from the displayed list so that it is highlighted and press Enter. Result: The Architect. Object Property <88*****> Display: General Data screen displays. Note: If a search list does not display, review your selection criteria, make any changes and press Enter to search again.
5.	Click the Changes between Display <-> Change icon in the Navigation pane. Result: The Architect. Object Property <88*****> Change: General Data screen displays.
6.	Update the following fields on the General Data tab: <ul style="list-style-type: none"> • Acq. Disposal Status (e.g. Purchased). • Management Status (e.g. Leasable). • User Status (e.g. 04 MNGD – Managed). Notes: <ul style="list-style-type: none"> • This step is completed by NZTA Property Managers only. • For the User Status field, click the Change User Status icon (Pencil) to display the Set User Status dialog box, select the new User Status and then click the Enter icon (tick).

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Step	Action
7.	Update the Maintenance Level field (e.g. 11 Maintain to Improve) on the Additional Data tab (if required).
8.	<p>On the Partners tab:</p> <ul style="list-style-type: none"> select the Owner in the Partners list, and add a date in the End of relat. field (e.g. 30.05.2013). <p>Note: This because NZTA has purchased this property from its owner as the conclusion of the Acquisition process. This owner is end-dated so the history is kept and NZTA (on behalf of her Majesty the Queen) is added as the new owner.</p>
9.	<p>Then add the new owner (NZTA) by:</p> <ul style="list-style-type: none"> clicking the Assign New Partner icon selecting Owner from the drop-down list. in the Business Partner Search dialog box that displays use the search terms to find an existing partner (e.g. HMQ Vested in NZTA). complete the Start reltnship. field (e.g. 30.05.2013) and the End of relat. Field (if known) (e.g. 31.12.2016). <p>Note: The date difference between the End of relat. field (e.g. 30.05.2013) for the “old” Owner and the Start reltnship. field (e.g. 30.05.2013) for NZTA as the “new” owner should either be the same date or the following date (e.g. 30.05.2013 to 31.05.2013) otherwise error messages are displayed when saved.</p>
10.	Select the Partners that may require an end date (e.g. NZTA Acquisition Manager, Property Acq. Company and or Property Acq. Consultant) and complete the End of relat. field (e.g. 30.05.2013).
11.	<p>Add new partners by doing the following:</p> <ul style="list-style-type: none"> Click the Assign New Partner icon. Select an option from the drop-down list (e.g. new NZTA Property Manager, Property Mgmt. Company, and Property Manager are all required). In the Business Partner Search dialog box that displays, either: <ul style="list-style-type: none"> use search terms to find an existing partner (e.g. David Apthorp for NZTA Property Manager), or select Create in Role and enter the new details for the person/ organisation (for more detail, refer to the RE80 (Create Business Partner) transaction guide). Complete the Start reltnship field (e.g. 30.05.2013) and if required End of relat. field (e.g. 31.12.2016). Repeat the steps above for each additional role to be added. <p>Note: If you click the Save icon without selecting the required 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 6 (e.g. MNGN - Managed).</p>
12.	Add a Rateable valuation measurement type (e.g. V030) on the Measurements tab.
13.	Click the Check icon on the top toolbar to verify the data and correct any errors.
14.	<p>Once there are no errors, click the Save icon.</p> <p>Result: At the bottom left-hand side of the screen, the message ‘<i>Architectural object ID no <88*****> was changed</i>’ is displayed.</p>

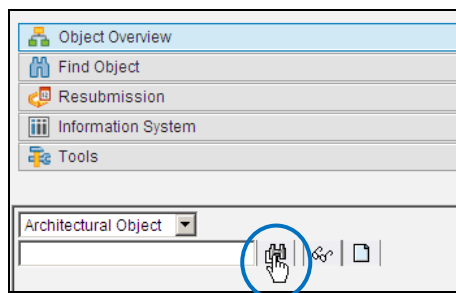
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Step	Action
15.	<p>As the property is now under Management, the Property Management WBS must be authorised for use by the NZTA Property Manager.</p> <p>To check that this has been done, do the following in the Architectural Object:</p> <ul style="list-style-type: none"> click on the Assignment tab and select the Property Management WBS (e.g. 88#####) in the WBS Element Details pane, double-click on the underlined WBS number, and in the Display WBS Element: Basic Data screen, check that under Operative indicators there is a tick in displayed beside the Acct asst elem. field. <p>Note: If there is no tick, you need to contact the NZTA Property Manager to set this up; otherwise nothing will be posted against the lease.</p>

Detailed procedure

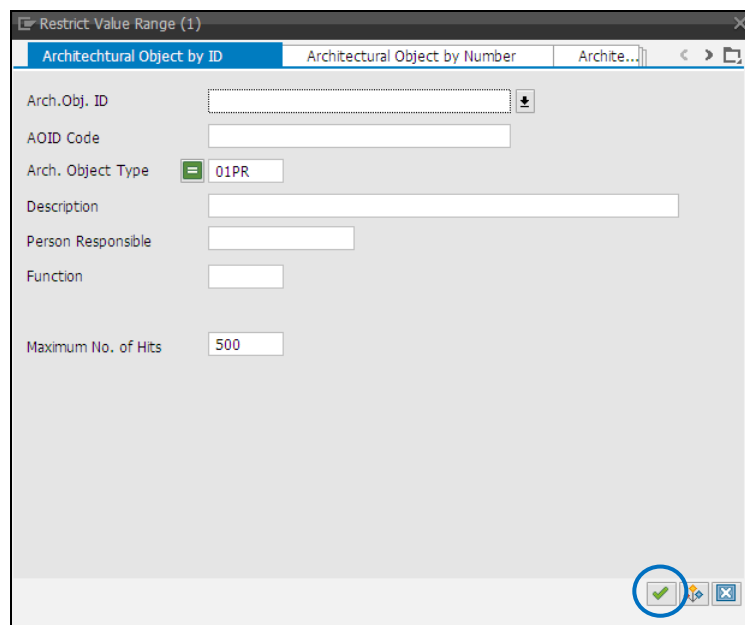
Follow the steps below to complete this transaction.

1. Select **Object Overview** in the Navigation area.

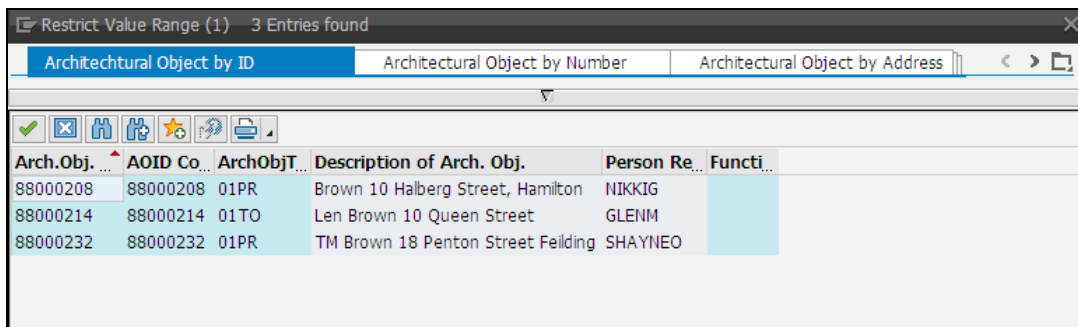


2. Select Architectural Object from the drop-down list, and then click the **Find** icon (Binoculars).

Result: The **Restrict Value Range** dialog box displays.



3. Select a suitable search from the different tabs (e.g. Architectural Object by ID):
 - enter search criteria (e.g. a description, or the person responsible), and
 - click the **Find** icon.
4. Select an architectural object (property) from the displayed list so that it is highlighted and press Enter.



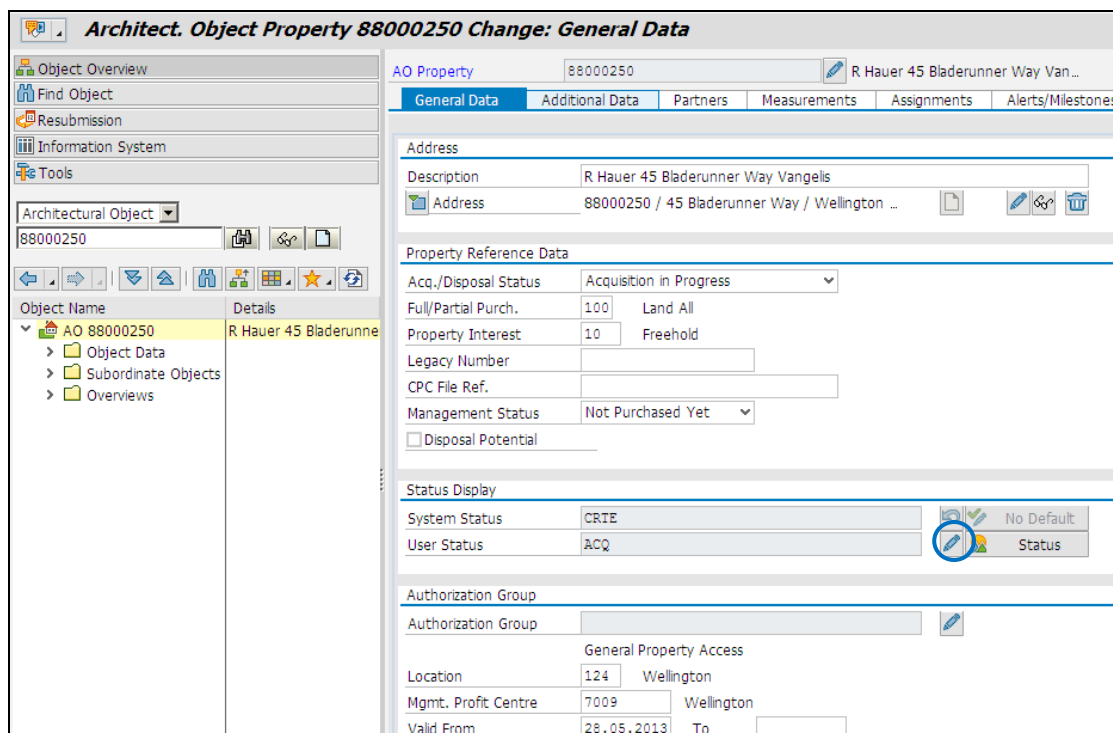
Arch.Obj. ...	AOID Co...	ArchObjT...	Description of Arch. Obj.	Person Re...	Functi...
88000208	88000208	01PR	Brown 10 Halberg Street, Hamilton	NIKKIG	
88000214	88000214	01TO	Len Brown 10 Queen Street	GLENM	
88000232	88000232	01PR	TM Brown 18 Penton Street Feilding	SHAYNEO	

Result: The Architect. Object Property <88*****> Display: General Data screen displays.

Note: If a search list does not display, review your selection criteria, make any changes and press Enter to search again.

5. Click the **Changes between Display <-> Change** icon in the Navigation pane.

Result: The Architect. Object Property <88*****> Change: General Data screen displays.



Architect. Object Property 88000250 Change: General Data

AO Property: 88000250 | R Hauer 45 Bladerunner Way Van...

General Data | Additional Data | Partners | Measurements | Assignments | Alerts/Milestones

Address

Description: R Hauer 45 Bladerunner Way Vangelis

Address: 88000250 / 45 Bladerunner Way / Wellington ...

Property Reference Data

Acq./Disposal Status: Acquisition in Progress

Full/Partial Purch.: 100 Land All

Property Interest: 10 Freehold

Legacy Number: []

CPC File Ref.: []

Management Status: Not Purchased Yet

Disposal Potential

Status Display

System Status: CRIE

User Status: ACQ

Authorization Group

Authorization Group: General Property Access

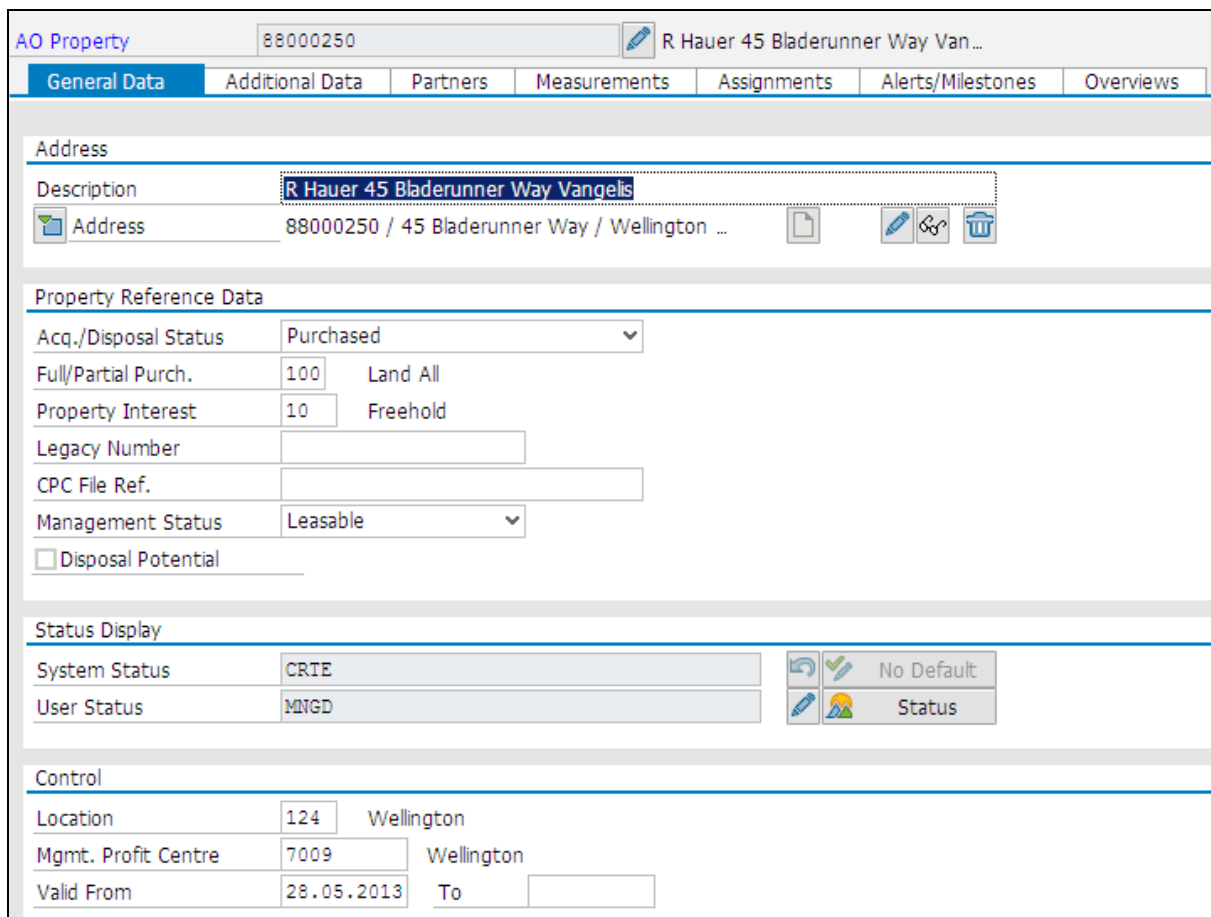
Location: 124 Wellington

Mgmt. Profit Centre: 7009 Wellington

Valid From: 28.05.2013 To: []

6. Update the following fields on the **General Data** tab:

Field	Description
Acq. Disposal Status	Describes the general type of building usage options according to the land use map (e.g. Purchased).
Management Status	Description of the overall condition of the property and what it may be used for (e.g. Leasable).
User Status	<p>Defines the status of the Property Object (e.g. 04 MNGD – Managed).</p> <p>Notes:</p> <ul style="list-style-type: none"> This step is completed by NZTA Property Managers only. For the User Status field, click the Change User Status icon (Pencil) to display the Set User Status dialog box, select the new User Status and then click the Enter icon (tick).



The screenshot shows the SAP Property Object Maintenance interface for object 88000250. The 'General Data' tab is active. The 'Address' section shows the description 'R Hauer 45 Bladerunner Way Vangelis' and the full address '88000250 / 45 Bladerunner Way / Wellington ...'. The 'Property Reference Data' section includes fields for 'Acq./Disposal Status' (Purchased), 'Full/Partial Purch.' (100), 'Property Interest' (10), 'Legacy Number', 'CPC File Ref.', 'Management Status' (Leasable), and a 'Disposal Potential' checkbox. The 'Status Display' section shows 'System Status' as CRTE and 'User Status' as MNGD. The 'Control' section shows 'Location' (124 Wellington), 'Mgmt. Profit Centre' (7009 Wellington), and 'Valid From' (28.05.2013).

7. Update the following field on the **Additional Data** tab:

Field	Description
Maintenance Level	Indicates the required maintenance level of the property object (e.g. 11 Maintain to Improve).

AO Property 88000250 R Hauer 45 Bladerunner Way Van...

General Data Additional Data Partners Measurements Assignments Alerts/Milestones

Maintenance Planning

Initiative

Construction Start Date

Maintenance Level 12 Maintain at Current Level

Building condition

Valuation Information

Main usage type 30 Residential Improved

Rural Use

Heritab. build.right

Floors

Impr.Built Date

8. On the **Partners** tab:

- select the **Owner** in the Partners list, and
- add a date in the **End of relat.** field (e.g. 30.05.2013).

Note: This because NZTA has purchased this property from its owner as the conclusion of the Acquisition process. This owner is end-dated so the history is kept and NZTA (on behalf of her Majesty the Queen) is added as the new owner.

AO Property 88000250 R Hauer 45 Bladerunner Way Van...

General Data Additional Data Partners Measurements Assignments Alerts/Milestones Overviews

[Display All Periods]

Master Data

Det	Name of BP Role	Partner	Name/address	Start reltnship	End of relat.
	NZTA Acquisition Manager	101002420	Amanda Hampton // Hamilton	28.05.2013	
	Property Acq. Company	101002382	TPG Wellington // Wellington	28.05.2013	
	Property Acq. Consultant	101012056	Emily Birch // Christchurch	28.05.2013	
▶	Owner	101012489	Rutger Hauer / P.O. Box 600 / Wellington 5028	28.05.2013	30.05.2013

Rutger Hauer / P.O. Box 600 / Wellington 5028

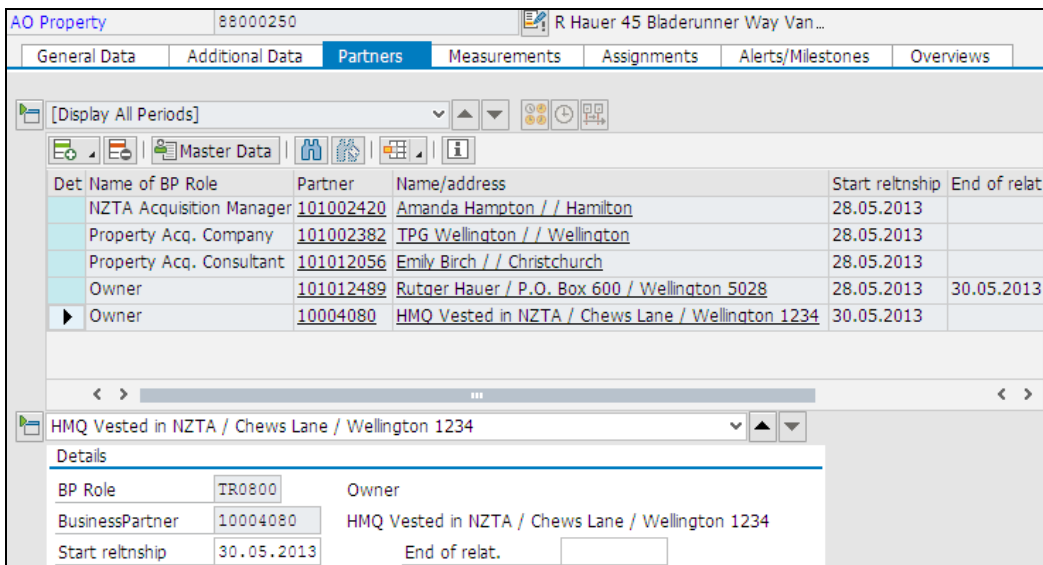
Details

BP Role	TR0800	Owner	
BusinessPartner	101012489	Rutger Hauer / P.O. Box 600 / Wellington 5028	
Start reltnship	28.05.2013	End of relat.	30.05.2013
Address Type			
Frac. share	0.000	Factor 1 /	0
Co-ownership	0.000		
Share	0.00		

9. Then add the new owner (NZTA) by:

- clicking the **Assign New Partner** icon
- selecting **Owner** from the drop-down list.
- In the **Business Partner Search** dialog box that displays use the search terms to find an existing partner (e.g. HMQ Vested in NZTA)
- Complete the **Start reltnship** field (e.g. 30.05.2013) and the **End of relat.** Field (if known) (e.g. 31.12.2016).

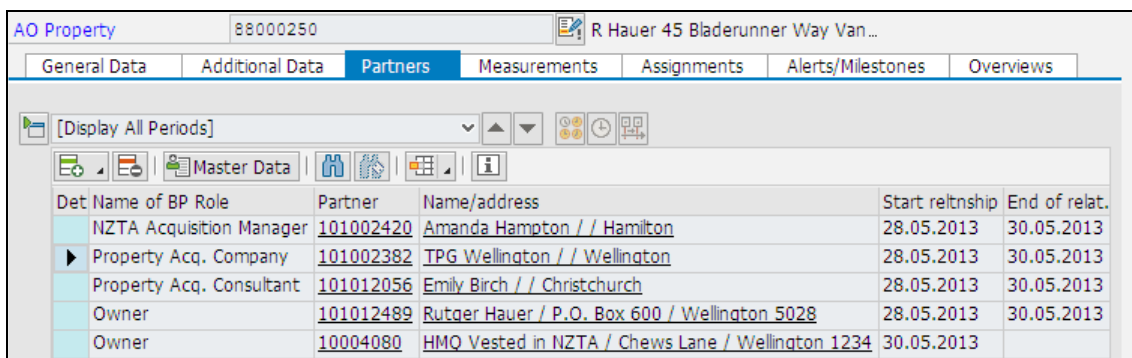
Note: The date difference between the **End of relat.** field (e.g. 30.05.2013) for the “old” Owner and the **Start reltnship** field (e.g. 30.05.2013) for NZTA as the “new” owner should either be the same date or the following date (e.g. 30.05.2013 to 31.05.2013) otherwise error messages are displayed when saved.



Det	Name of BP Role	Partner	Name/address	Start reltnship	End of relat.
	NZTA Acquisition Manager	101002420	Amanda Hampton // Hamilton	28.05.2013	
	Property Acq. Company	101002382	TPG Wellington // Wellington	28.05.2013	
	Property Acq. Consultant	101012056	Emily Birch // Christchurch	28.05.2013	
	Owner	101012489	Rutger Hauer / P.O. Box 600 / Wellington 5028	28.05.2013	30.05.2013
	Owner	10004080	HMQ Vested in NZTA / Chews Lane / Wellington 1234	30.05.2013	

Details	
BP Role	TR0800 Owner
BusinessPartner	10004080 HMQ Vested in NZTA / Chews Lane / Wellington 1234
Start reltnship	30.05.2013 End of relat.

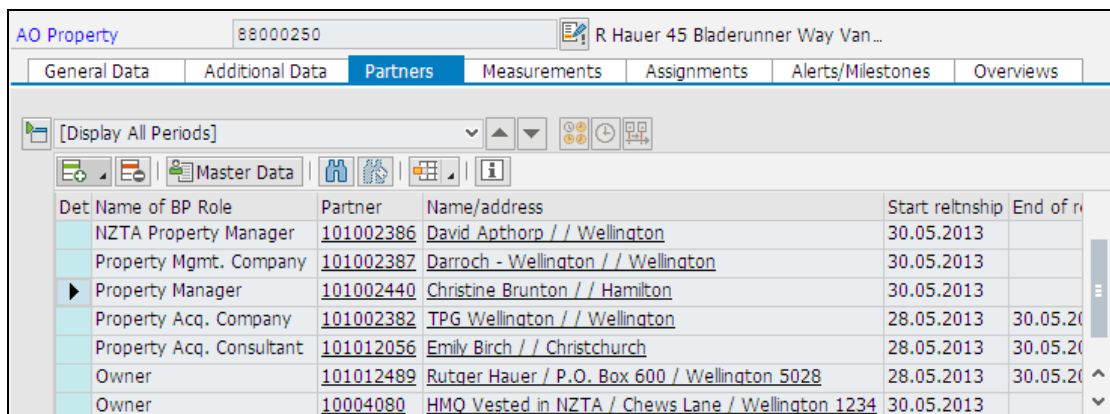
10. Select the Partners that may require an end date (e.g. NZTA Acquisition Manager, Property Acq. Company and or Property Acq. Consultant) and complete the **End of relat.** field (e.g. 30.05.2013).



Det	Name of BP Role	Partner	Name/address	Start reltnship	End of relat.
	NZTA Acquisition Manager	101002420	Amanda Hampton // Hamilton	28.05.2013	30.05.2013
	Property Acq. Company	101002382	TPG Wellington // Wellington	28.05.2013	30.05.2013
	Property Acq. Consultant	101012056	Emily Birch // Christchurch	28.05.2013	30.05.2013
	Owner	101012489	Rutger Hauer / P.O. Box 600 / Wellington 5028	28.05.2013	30.05.2013
	Owner	10004080	HMQ Vested in NZTA / Chews Lane / Wellington 1234	30.05.2013	

11. Add new partners by doing the following:

- Click the **Assign New Partner** icon.
- Select an option from the drop-down list (e.g. new NZTA Property Manager, Property Mgmt. Company, and Property Manager are all required).
- In the **Business Partner Search** dialog box that displays, either:
 - use search terms to find an existing partner (e.g. David Apthorp for NZTA Property Manager), or
 - select **Create in Role** and enter the new details for the person/organisation (for more detail, refer to the [RE80 \(Create Business Partner\)](#) transaction guide).
- Complete the **Start reltnship.** field (e.g. 30.05.2013) and if required **End of relat.** field (e.g. 31.12.2016).
- Repeat the steps above for each additional role to be added.

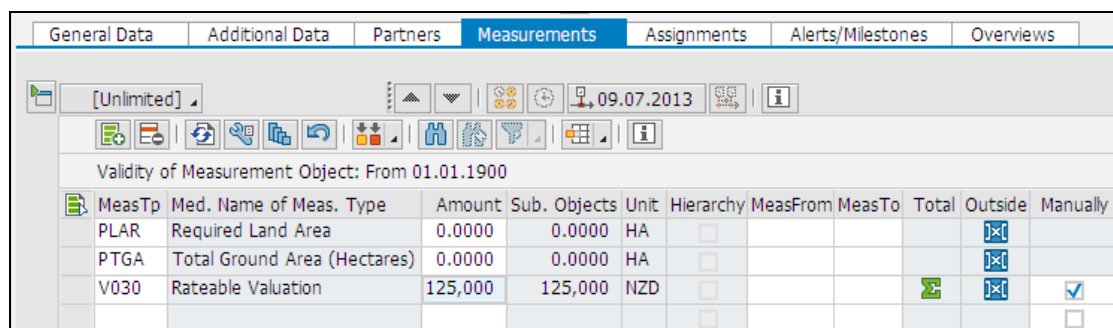


The screenshot shows the 'Partners' tab in the SAP Business Partner Search dialog. The table below represents the data visible in the screenshot:

Det Name of BP Role	Partner	Name/address	Start reltnship	End of relat.
NZTA Property Manager	101002386	David Apthorp // Wellington	30.05.2013	
Property Mgmt. Company	101002387	Darroch - Wellington // Wellington	30.05.2013	
Property Manager	101002440	Christine Brunton // Hamilton	30.05.2013	
Property Acq. Company	101002382	TPG Wellington // Wellington	28.05.2013	30.05.2016
Property Acq. Consultant	101012056	Emily Birch // Christchurch	28.05.2013	30.05.2016
Owner	101012489	Rutaer Hauer / P.O. Box 600 / Wellington 5028	28.05.2013	30.05.2016
Owner	10004080	HMO Vested in NZTA / Chews Lane / Wellington 1234	30.05.2013	

Note: If you click the **Save** icon without selecting the required 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 6 (e.g. MNGD - Managed).

12. Add a Rateable valuation measurement type (e.g. V030) on the **Measurements** tab.



The screenshot shows the 'Measurements' tab in the SAP system. The table below represents the data visible in the screenshot:

MeasTp	Med. Name of Meas. Type	Amount	Sub. Objects	Unit	Hierarchy	MeasFrom	MeasTo	Total	Outside	Manually
PLAR	Required Land Area	0.0000	0.0000	HA					<input type="checkbox"/>	<input type="checkbox"/>
PTGA	Total Ground Area (Hectares)	0.0000	0.0000	HA					<input type="checkbox"/>	<input type="checkbox"/>
V030	Rateable Valuation	125,000	125,000	NZD					<input type="checkbox"/>	<input checked="" type="checkbox"/>

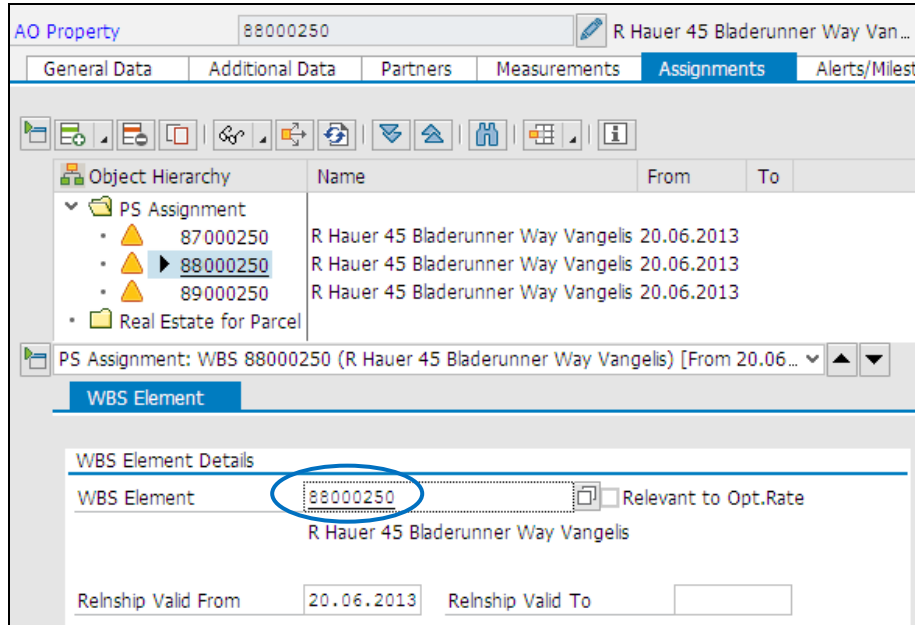
13. Click the **Check** icon on the top toolbar to verify the data and correct any errors.

14. Once there are no errors, click the **Save** icon.

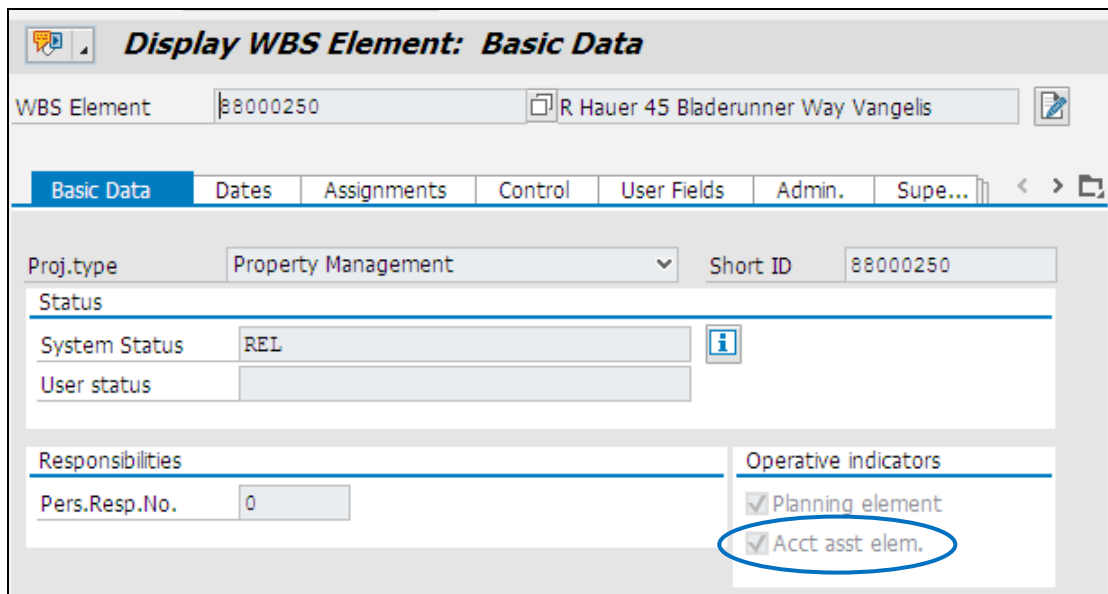
Result: At the bottom left-hand side of the screen, the message *'Architectural object ID no <88*****> was changed'* is displayed.

15. As the property is now under Management, the Property Management WBS must be authorised for use by the NZTA Property Manager. To check that this has been done, do the following in the Architectural Object:

- Click on the **Assignment** tab and select the Property Management WBS (e.g. 88#####).
- In the **WBS Element Details** pane, double-click on the underlined WBS number (circled below).



- In the **Display WBS Element: Basic Data** screen displayed, check that under **Operative indicators** there is a tick in displayed beside the Acct asst elem. field (circled below).



Note: If there is no tick, you need to contact the NZTA Property Manager to set this up; otherwise nothing will be posted against the lease.