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): • 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: • Acq. Disposal Status (e.g. Purchased). • Management Status (e.g. Leasable). • User Status (e.g. 04 MNGD – Managed). **Notes**: • 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.	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.
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.
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.	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.
	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).

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.	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.

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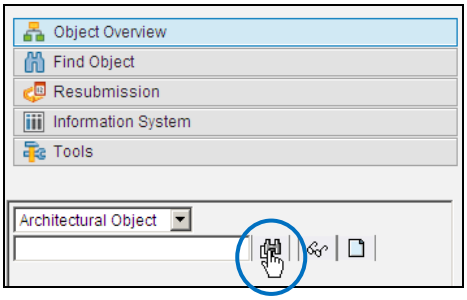
Step	Action
15.	As the property is now under Management, the Property Management WBS must be authorised for use by the NZTA Property Manager. To check that this has been done, do the following in the Architectural Object: • click on the **Assignment** tab and select the Property Management WBS (e.g. 88######) • in the **WBS Element Details** pane, double-click on the underlined WBS number, 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. **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.

Detailed procedure

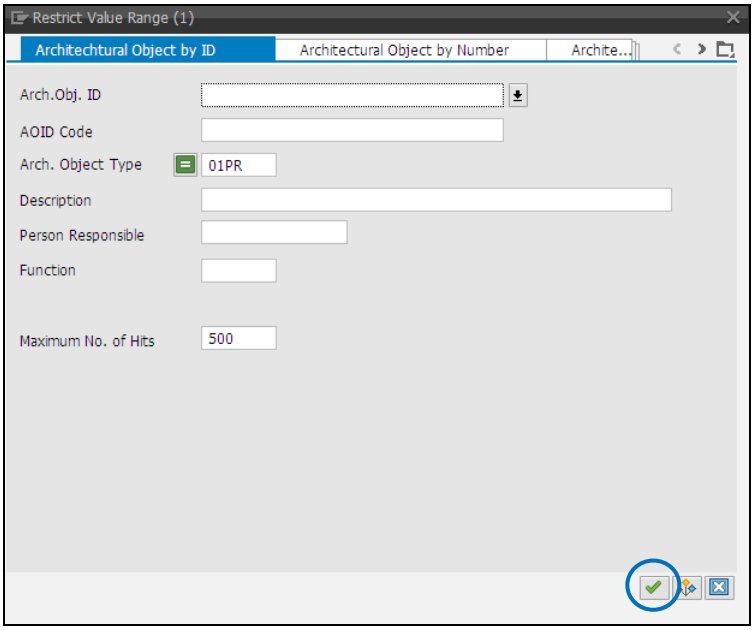
Follow the steps below to complete this transaction.

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



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

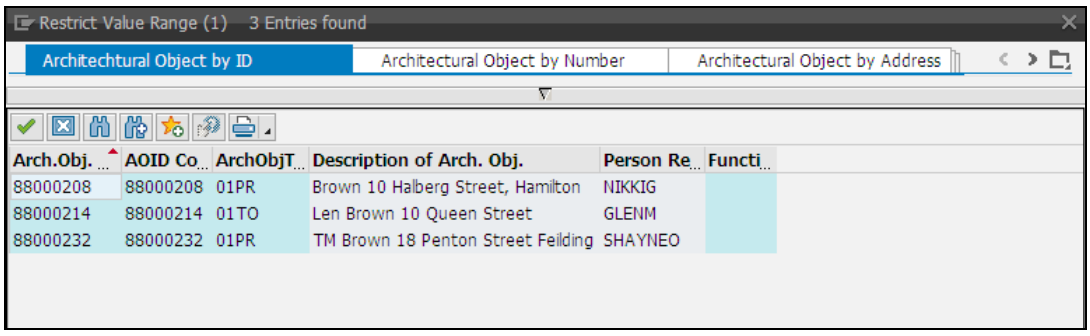
   Result: The **Restrict Value Range** dialog box displays.



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.

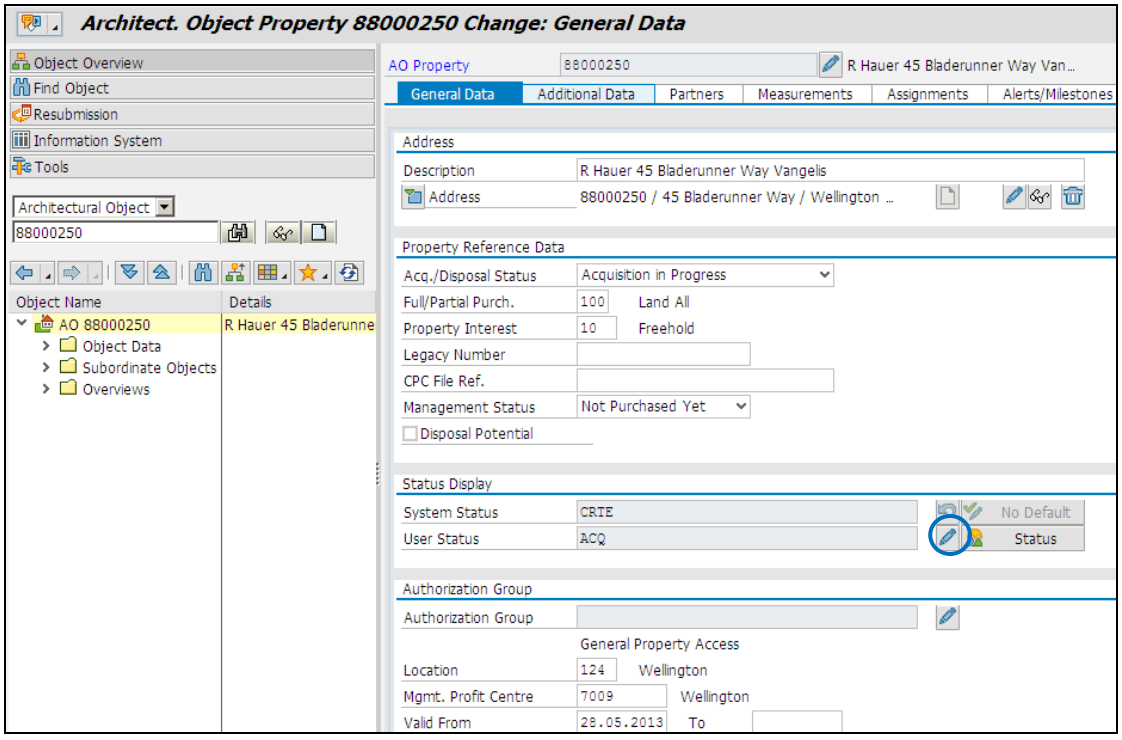


Result: The **Architect. Object Property <88******> Display**: **General Data** screen displays.

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

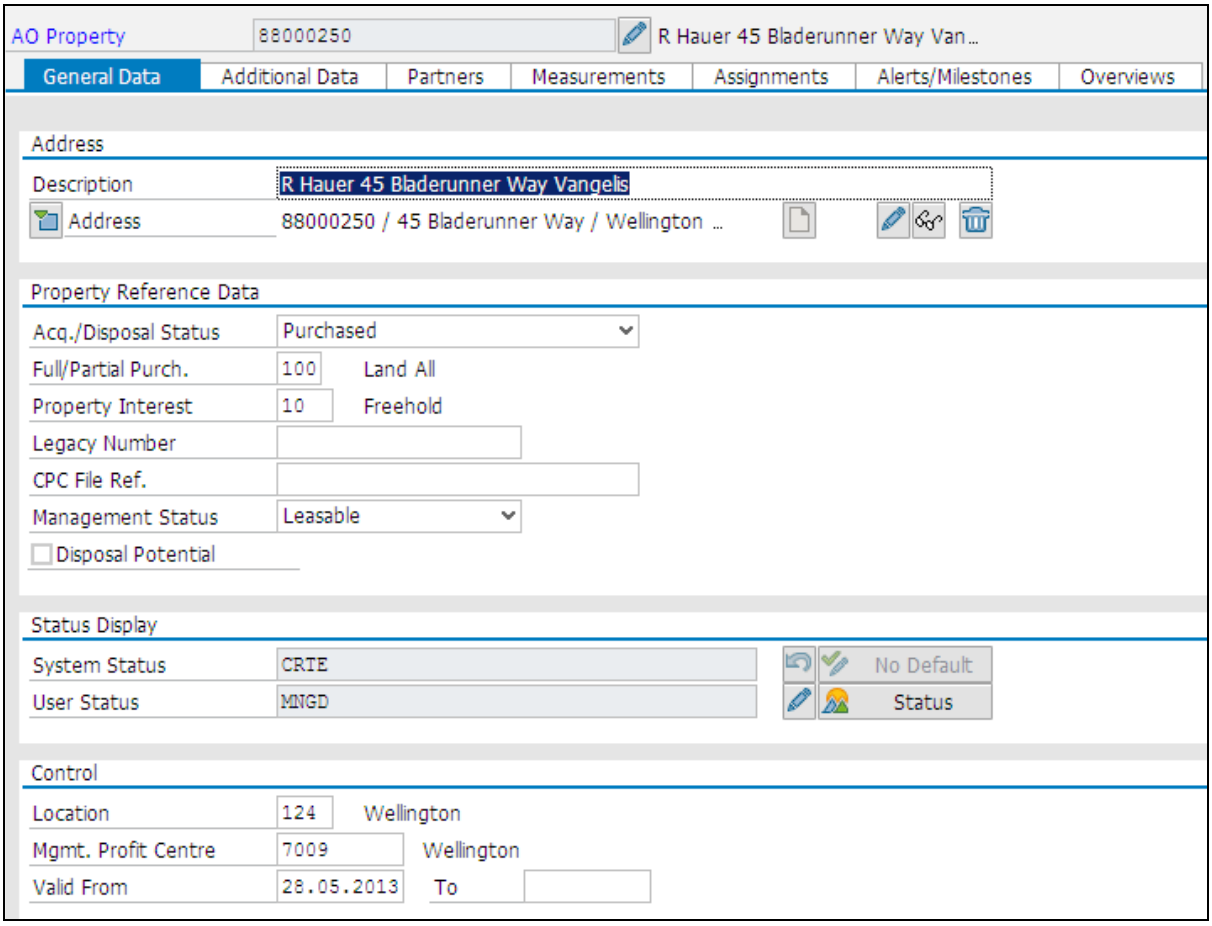
5. Click the **Changes between Display <-> Change** icon in the Navigation pane.

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



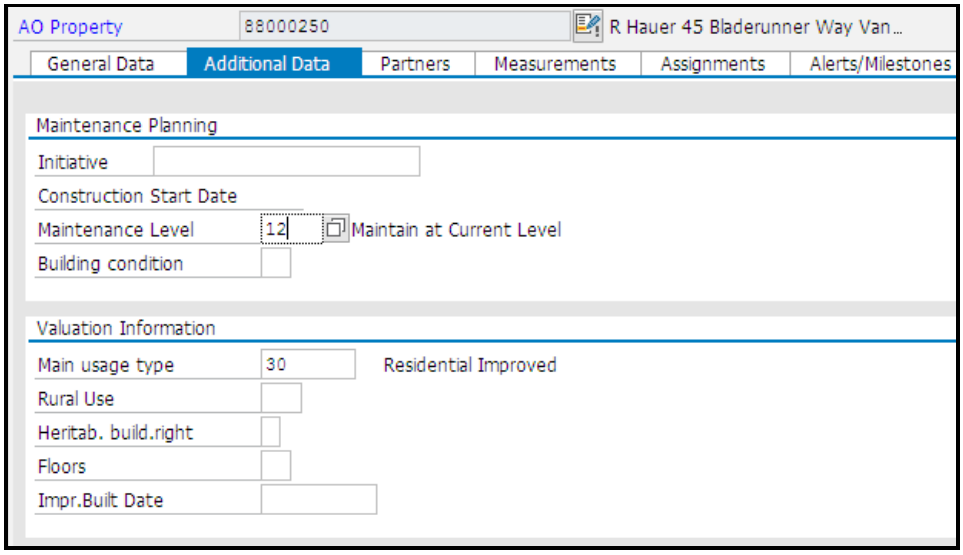
6. Update the following fields on the **General Data** tab:

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	Defines the status of the Property Object (e.g. 04 MNGD – Managed). **Notes**: • 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).



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

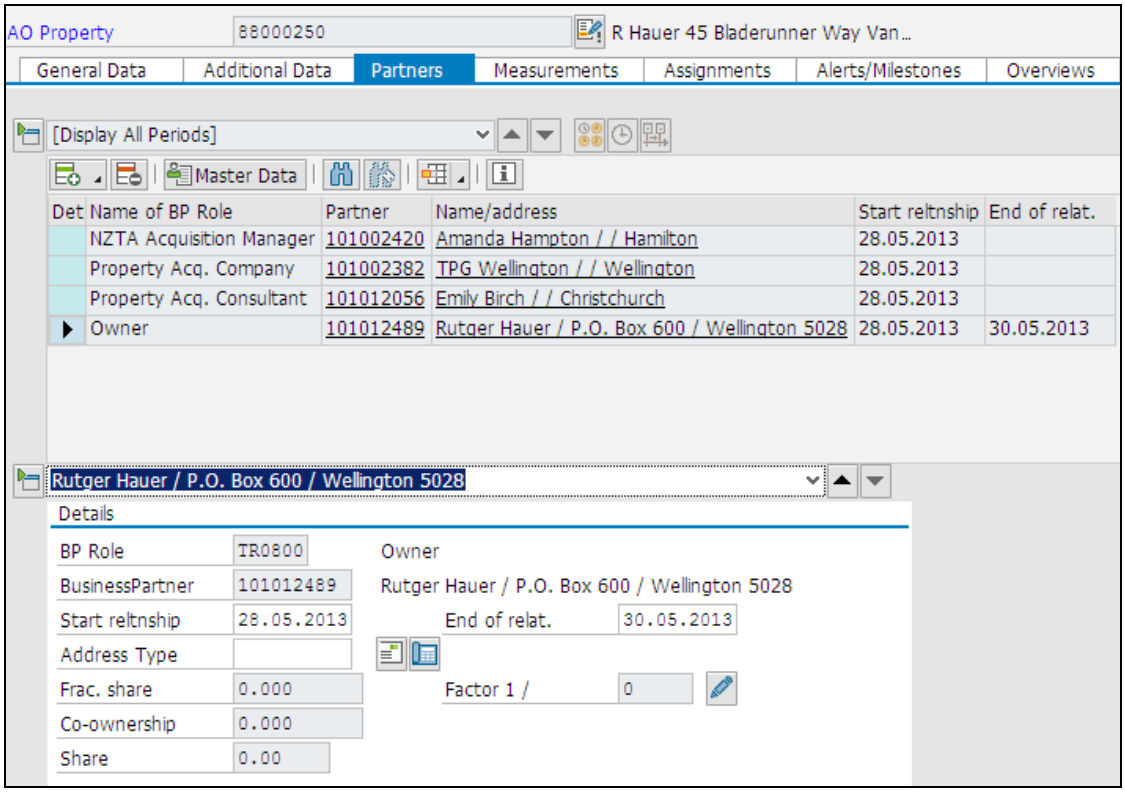
Field	Description
Maintenance Level	Indicates the required maintenance level of the property object (e.g. 11 Maintain to Improve).



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).

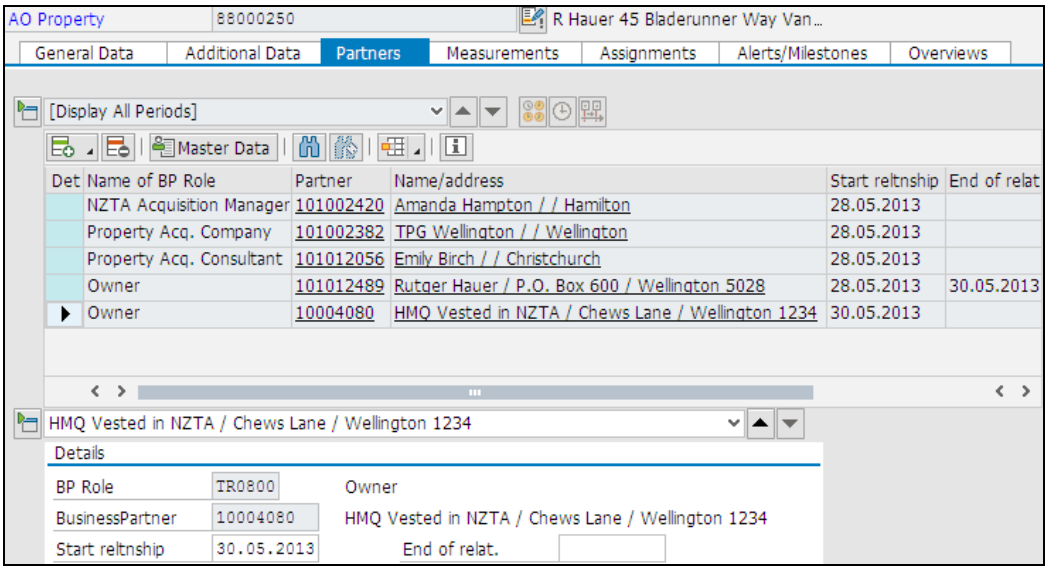
   Note: This because NZTA has purchased this property from its owner as the conclusion of the Acquisition process. This owner is end-dated so the history is kept and NZTA (on behalf of her Majesty the Queen) is added as the new owner.



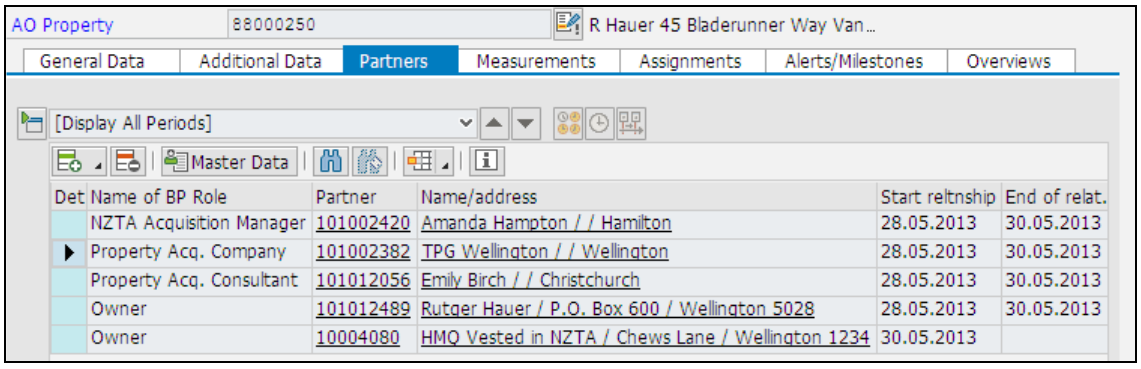
9. Then add the new owner (NZTA) by:

- 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.

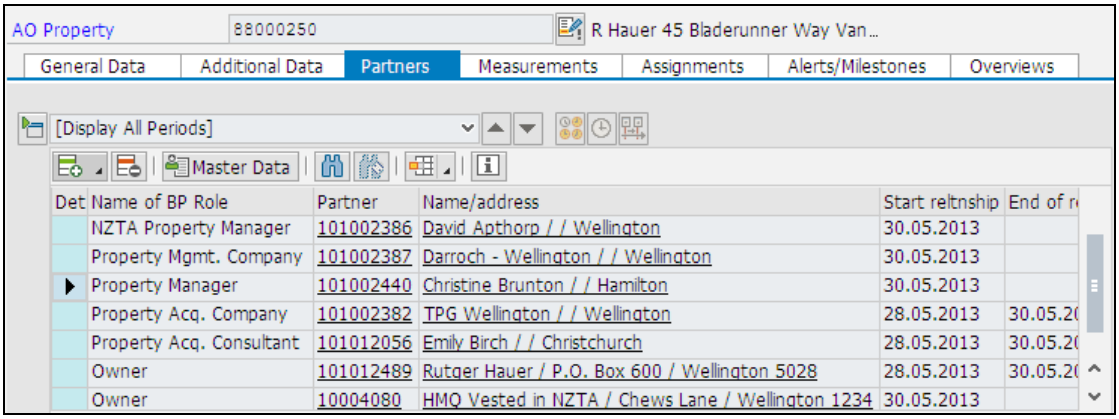


10. Select the Partners that may require an end date (e.g. NZTA Acquisition Manager, Property Acq. Company and or Property Acq. Consultant) and complete the **End of relat**. field (e.g. 30.05.2013).



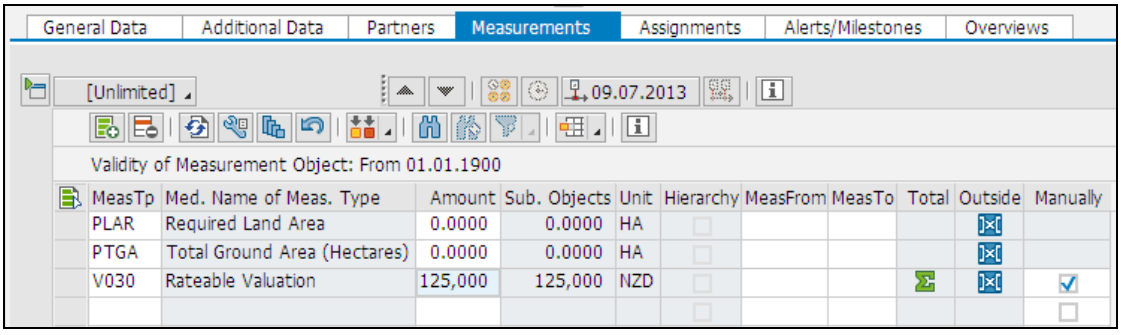
11. Add new partners by doing the following:

- 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.



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.



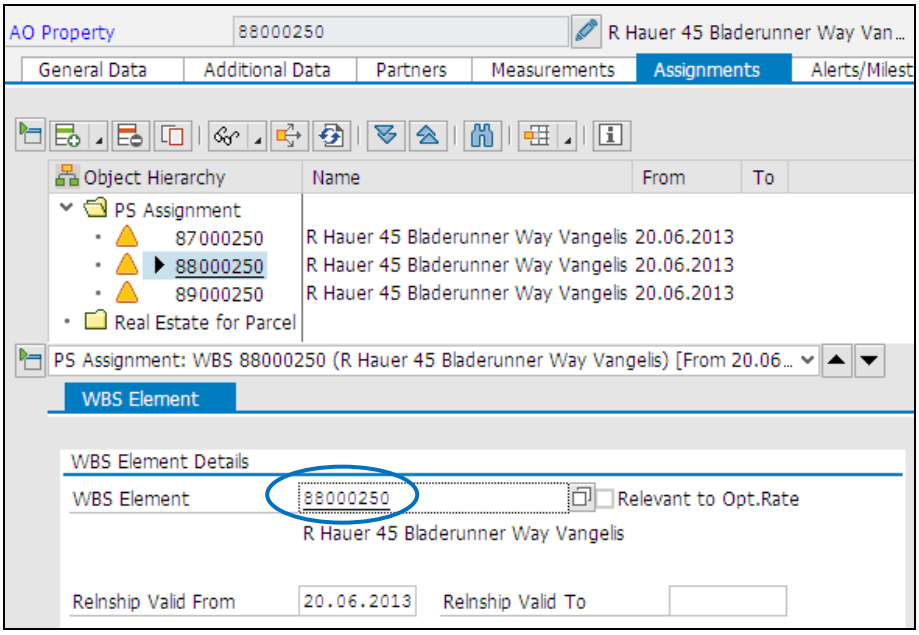
13. Click the **Check** icon on the top toolbar to verify the data and correct any errors.

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

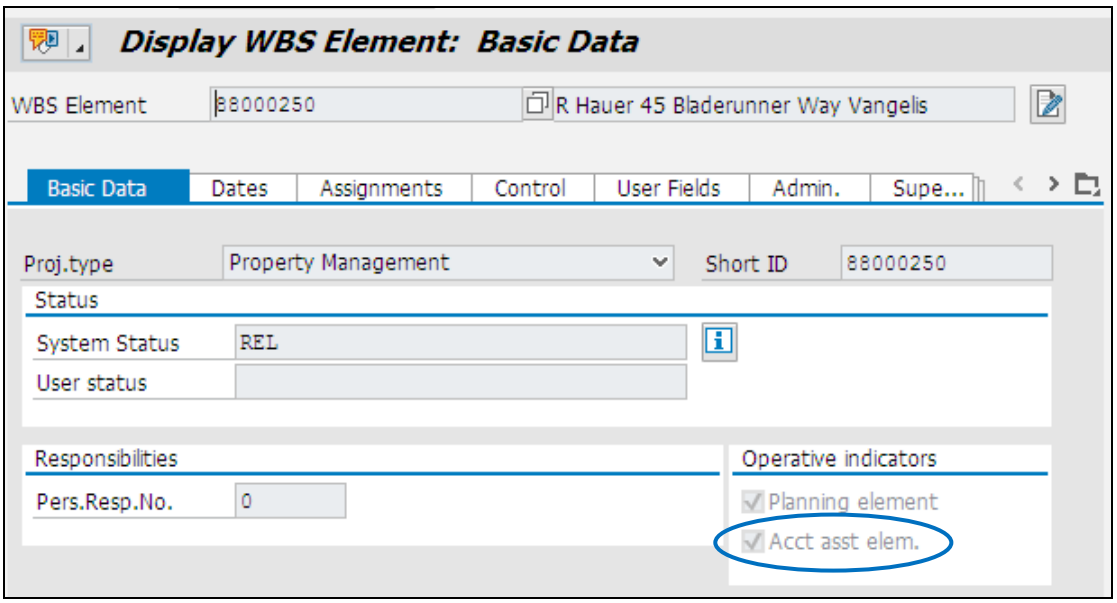
Result: At the bottom left-hand side of the screen, the message *'Architectural object ID no <88******> was changed'* is displayed.

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.