RE80: Create Property Record for a Road Reserve Transaction Guide

This guide shows you how to use RE80 (Real Estate Navigator) to create an architectural object (Property record) for Property. Use either the quick-step procedure below or the detailed procedure which follows.

This transaction is used to create a Property record for a Road Reserve and is part of the PM7.2 Licensing/Leasing Utilisation of Road Reserve process.

Access the **RE Navigator** initial screen through either:

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

Note: Before creating a new property record, first check that it has does not already exist, by searching on the record details.

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 **Create** icon.
3.	Complete the **Arch. Object Type** (select '**01RR**' for **Road & Road Reserves**) field in the **Create Architectural Object** dialog box and press Enter. **Note**: Delete any data that defaults into the Arch. Object No. or AOID Code fields. **Result**: The **Architect. Object <Type> <NEW> Create**: **General Data** screen opens in the right-hand pane with the default **General Data** tab displaying. (Note that the last part of the screen name changes as you move between the tabs.)
4.	Enter the Name of the owner and the property address of the architectural object (e.g. NZTA Road Reserve Victory Crescent Tawa Wellington) in the **Description** field of the **Address** section.
5.	Complete the following fields on **Architect. Object <Type> <NEW> Create**: **General Data** screen: • Acq/Disposal Status (e.g. Purchased). • Legacy number (e.g. PADS123#). • Management Status (e.g. Leasable). • Main Usage type (e.g. 30 Residential Improved). • Location (e.g. 0124 Wellington) • Mgmt. Profit Center (e.g. 7009 Wellington). • Valid from (e.g. 10.05.2013). • To (e.g. Blank).

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Step	Action
6.	Do the following in the **Address** section: • Click the **Create New Address** icon. (The **Create address for Object AO <New>** dialog box displays.) • Enter the Country, Region, City, Suburb, Street, House Number (e.g. NZ, Wlg, Wellington, Tawa, Victory Crescent, 5). • Click the **Enter** icon. **Note**: This may take the system some time to process. **Result**: The **Create Address Architectural Object** dialog box displays the detail you have just entered. Click the **Enter** icons in the open dialog boxes to return to the **General Data** tab of the **Architect. Object Property <NEW> Create: General Data** screen.
7.	In the **Status Display** section, to update the **User Status** field: • click the **Change User Status** icon • select '04 MNGD – Managed', and • press Enter. **Note**: By default, all architectural objects are started with an acquisition status. This is not applicable for Road & Road Reserves as NZTA already owns the land and the Property record is being set-up so the land may be leased to a third party.
8.	After clicking the **Insert Row** icon, complete the following fields in **Legal Description** section (if required), then click the **Enter** icon to confirm the details entered: • Current Legal Title (tick box) • LINZ Parcel ID (e.g. LINZ 9900 AB). • Roll Number (e.g. 123456). • Title Reference (e.g. CFR CB/222 or GAZ 2008 p115). • Appellation (e.g. Lot525, DP 123).

9.	Select the **Partners** tab and do the following:
	• Click the **Assign new partner** icon.
	• Select an option from the drop down list (e.g. Owner).
	• Enter search terms in the **Business Partner Search** dialog box.
	• Press Enter.
	• Select the Business Partner name (e.g. HMQ Vested in NZTA) from the list that displays.
	Result: The selected partner's details are entered in the Details section on the Partners tab.
	Notes:
	• Refer to the RE80 (Create Business Partner) transaction guide for more details on creating Business Partners.
	• The following business partners need to be set-up:
	  ○ Owner.
	  ○ NZTA Property Manager.
	  ○ NZTA Network Manager.
	  ○ NZTA Property Management Company.
	  ○ Property Manager.
	• The Crown is the owner of Roads and Road Reserves.

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Step	Action
10.	Complete the following fields In the **Details** section, then press Enter to confirm the details entered: • Start relnship (e.g. 01.05.20123). • End of relat. (e.g. Blank).
11.	Repeat steps 9 and 10 to add all required partners (i.e. Owner, NZTA Property Manager, NZTA Network Manager, NZTA Property Management Company, and Property Manager). **Note**: If you click **Save** 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 7 (e.g. MNGD – Managed).
12.	Do the following in the **Measurements** tab, then press Enter to confirm the details entered: • Add the Required Land area (PLAR) and enter the amount. • Add the Total Ground Area (PTGA) and enter the amount. • Click the **Add Measurements** icon, to add any other relevant measurement types. **Note**: If at any time you wish to remove a measurement, select the line and click on the **Remove Measurements** icon.

13.	To add an alert for the property:
	• click on the **Alerts/Milestone** tab, and
	• click on the **Create Reminder Rule** icon and then select either:
	  ○ One-Time-Occurrence.
	  ○ As of date... every... months.

14	In the **Create Reminder Rule** dialog box displayed, complete the following fields and then click the **Enter** icon to confirm: • Resubmission Reason (e.g. M120 Review of Management Status) • Date Parameters (e.g. Start Date, Interval in Months, End Date) as required **Result**: The Resubmission Rules are displayed with the dates of the occurrences. **Notes**: • If at any time, you wish to remove an alert or milestone, select the line and click on the **Delete Reminder** icon. • Resubmissions for the property are listed on the left-hand side pane when the **Resubmissions** option is selected (only for the user that set them up).
15.	Click the **Check** icon on the top toolbar to verify the data and correct any errors.

16.	Once there are no errors, click the **Save** icon.
	Result: The following are displayed:
	• On the **Assignment** tab, the following new WBS elements ID numbers are generated and referenced to the Property Record:
	  ○ <87******> (Acquisition) generated even though it won't be used.
	  ○ <88******> (Management) used for the property lease.
	  ○ <89******> (Disposal).
	• At the bottom left-hand side of the screen, the message *'Architectural object ID no <88******> has been created'*.

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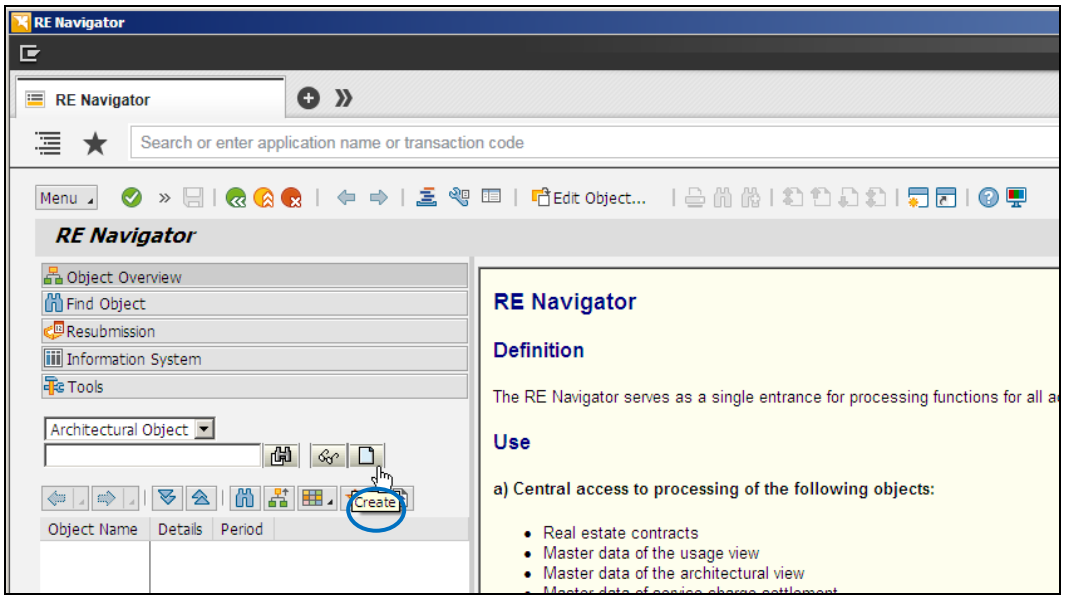
Step	Action
17.	As this property is under Management, the Property Management WBS must be authorised for use by the NZTA Property Manager. Do the following in the Architectural Object, to check that this has been done: • click the **Assignment** tab and select the Property Management WBS (e.g. 88######)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

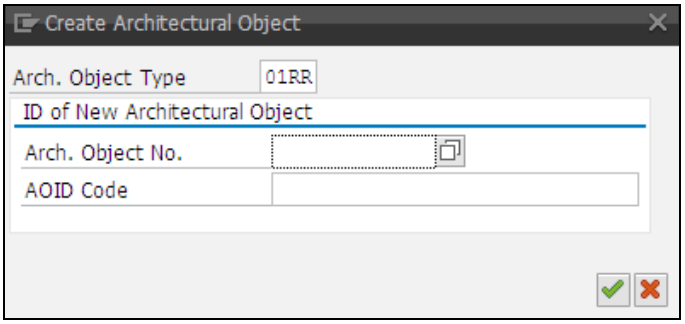
Follow the steps below to complete this transaction.

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

2. Select **Architectural Object** from the drop-down list, and then click the **Create** icon (circled below).

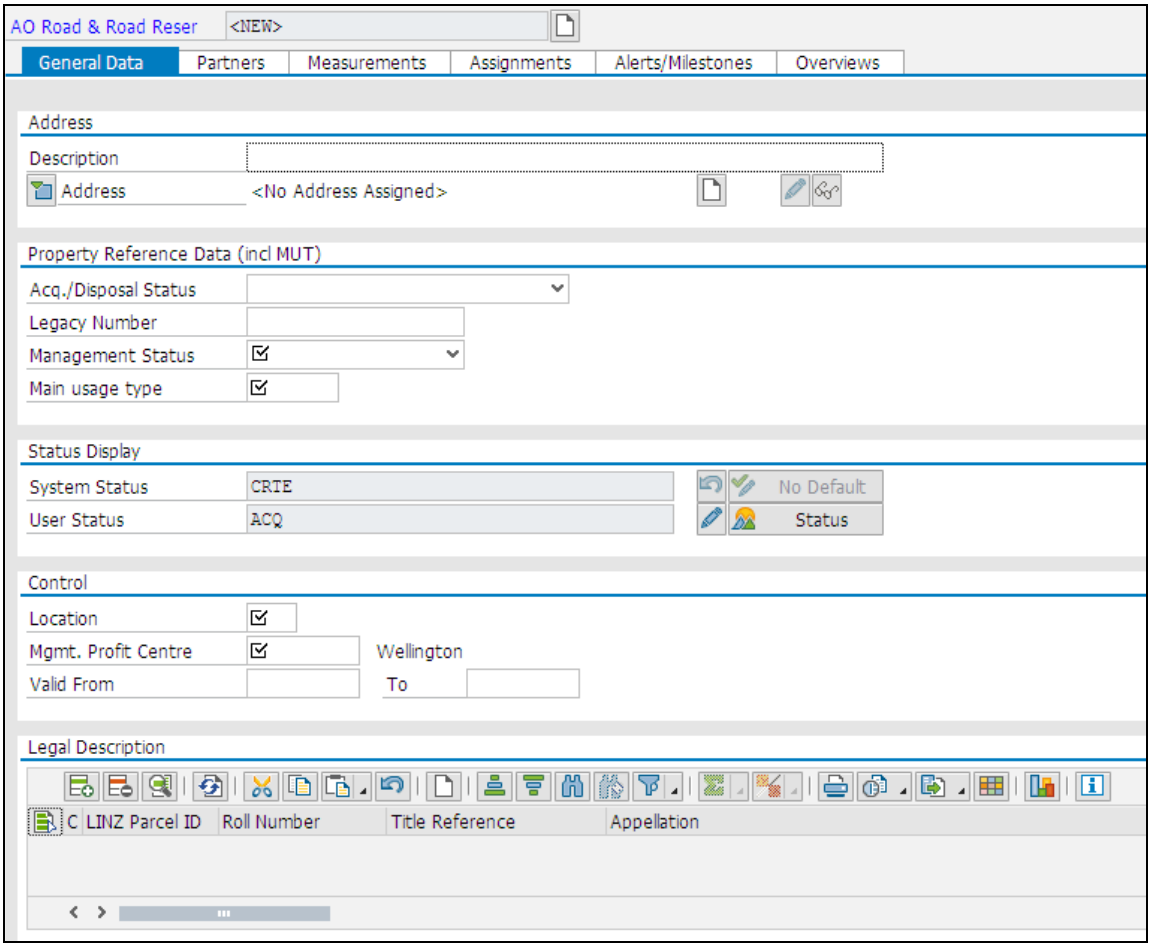


3. Complete the **Arch. Object Type** (select '**01RR**' for **Road & Road Reserves**) field in the **Create Architectural Object** dialog box and press Enter.



Note: Delete any data that defaults into the Arch. Object No. or AOID Code fields.

Result: The **Architect. Object <Type> <NEW> Create**: **General Data** screen opens in the right-hand pane with the default **General Data** tab displaying. (Note that the last part of the screen name changes as you move between the tabs.)



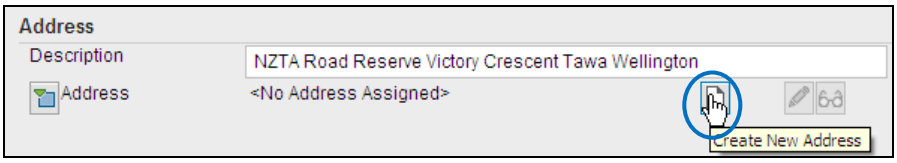
4. Enter the Name of the owner and the property address of the architectural object (e.g. NZTA Road Reserve Victory Crescent Tawa Wellington) in the Description field of the **Address** section.

5. Complete the following fields on **Architect. Object <Type> <NEW> Create**: **General Data** screen:

Field	Description
Acq/Disposal Status	Describes the general type of building usage options according to the land use map (e.g. Purchased).
Legacy number	The legacy system PADS and OPM references may be stored in this field separated by a "," (e.g. PADS123#).
Management Status	Details what the property can be used for and its management status within NZTA (e.g. Leasable).
Main Usage Type	Identifies the main use of the property (e.g. 30 Residential Improved).
Location	Region that is managing the property (e.g. 00124 Wellington).
Mgmt. Profit Centre	The Management Profit Centre is the profit centre adopted in the automatic creation of the accounting object. This field must be correct at the time the user status is updated to Management, the trigger point for creation (e.g. 7009 Wellington).
Valid from	Date from which an object is valid (e.g. 10.05.2013).
To	Date that the object is valid until (e.g. Blank).

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

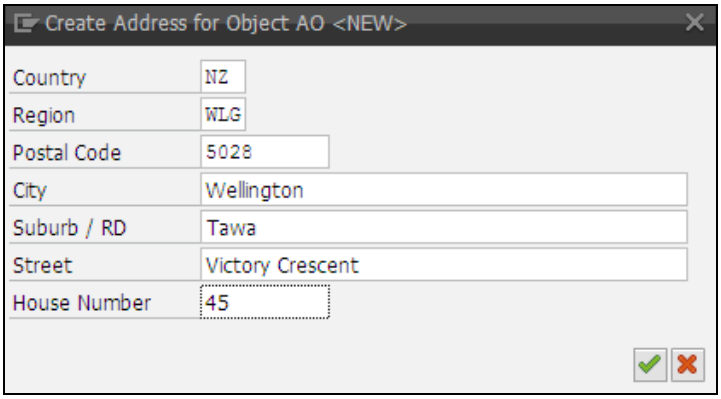
- Click the **Create New Address** icon (circled below).



- Enter the following fields into the **Create address for Object AO <New>** dialog box that displays.

Field	Description
Country	The Country name (e.g. NZ).
Region	The name of the region the property is in (e.g. Wlg).
City	The city closest to the property (e.g. Wellington).
Suburb	Suburb closest to property (e.g. Tawa), if required.
Street	Street name where the property/land is located (e.g. Victory Crescent).
House Number	Street number of the property (e.g. 45).

- Click the **Enter** icon.

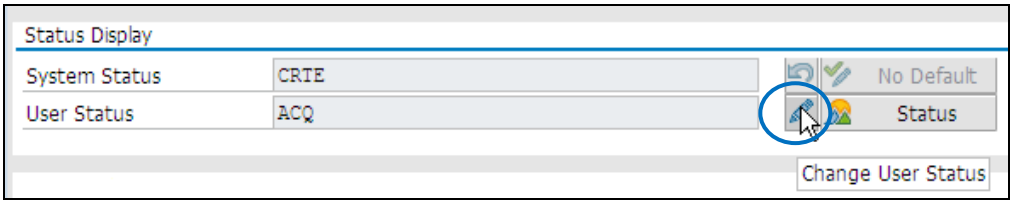


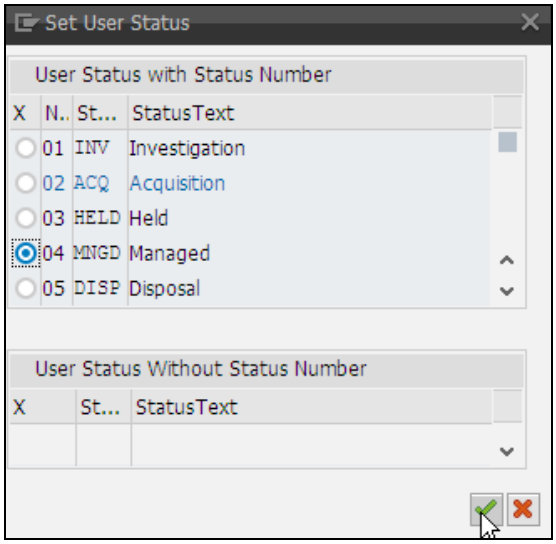
Note: This may take the system some time to process.

Result: The **Create Address Architectural Object** dialog box displays the detail you have just entered. Click the **Enter** icons in the open dialog boxes to return to the **General Data** tab of the **Architect. Object Property <NEW> Create**: **General Data** screen.

7. In the **Status Display** section, to update the **User Status** field:

- click the **Change User Status** (pencil) icon
- select '04 MNGD – Managed', and
- click the **Enter** icon.

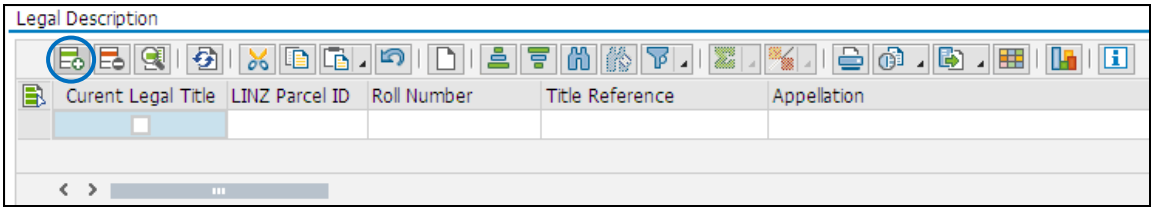




Note: By default, all architectural objects are started with the User Status of ACQ - Acquisition. This is not applicable for Road & Road Reserves as NZTA already owns the land and the Property record is being set-up so the land may be leased to a third party.

8. After clicking the **Insert Row** icon (circled below), complete the following fields in **Legal Description** section (if required), then click the **Enter** icon to confirm the details entered:

Field	Description
Current Legal Title (tick box)	Select if the Appellation and Property Titles are current.
LINZ Parcel ID	Records the LINZ Identifier/Reference (e.g. LINZ 9900 AB).
Roll Number	Name of the development plan (e.g. 123456)
Title Reference	The Computer Freehold Register Reference (e.g. CFR CB/222 or GAZ 2008 p115).
Appellation	Legal name/description of the property (e.g. Lot525, DP 123).



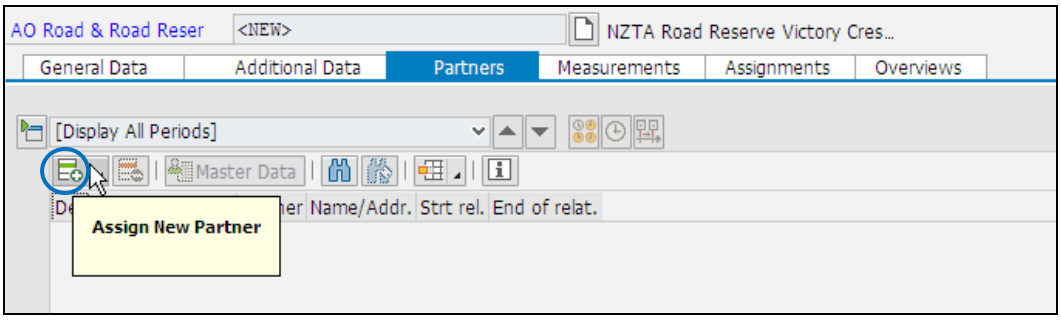
9. Select the **Partners** tab and do the following:

- Click the **Assign new partner** icon (circled below).
- Select an option from the drop down list (e.g. Owner).
- Enter search terms in the **Business Partner Search** dialog box.
- Press Enter.
- Select the Owner name (e.g. HMQ Vested in NZTA) from the list that displays.

Result: The selected partner's details are entered in the **Details** section on the **Partners** tab.

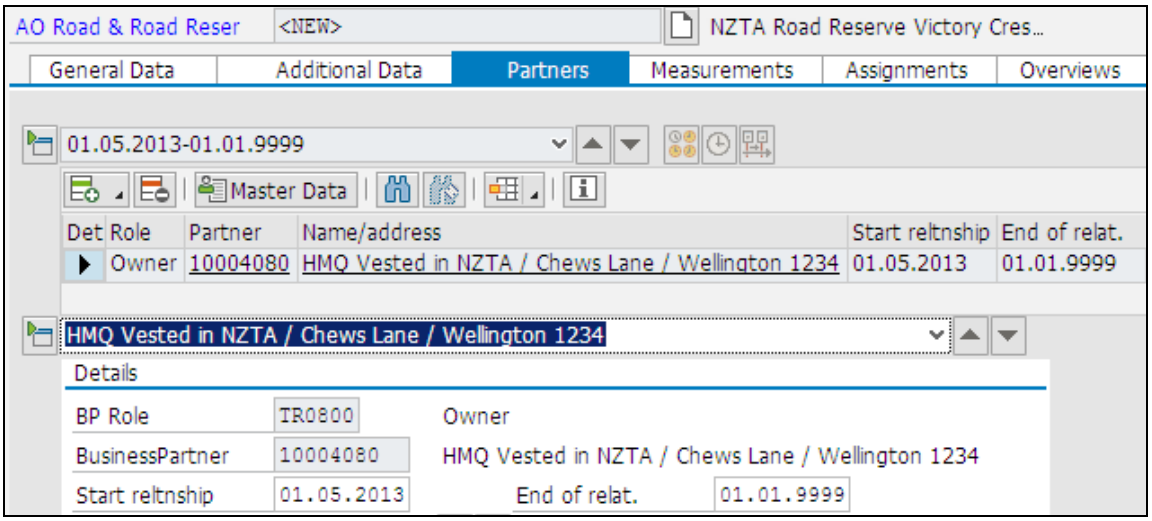
Notes:

- Refer to the RE80 (Create Business Partner) transaction guide for more details on creating Business Partners.
- The following business partners need to be set-up:
  - Owner.
  - NZTA Property Manager.
  - NZTA Network Manager.
  - NZTA Property Management Company.
  - Property Manager.
- The Crown is the owner of Roads and Road Reserves.



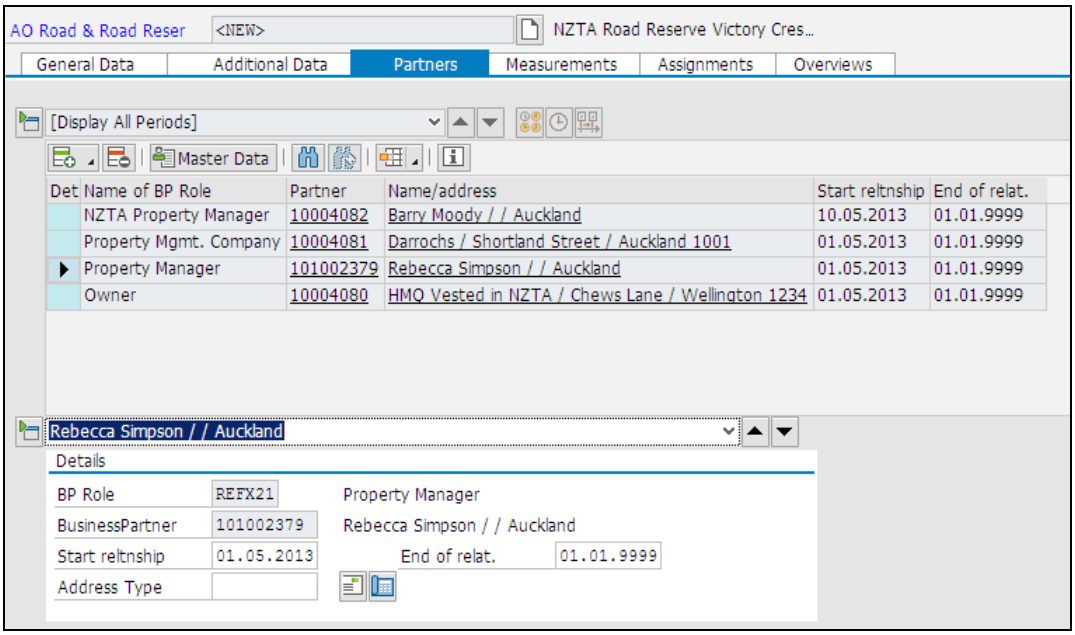
10. Complete the following fields In the **Details** section, then press Enter to confirm the details entered:

Field	Description
Start relnship.	Date from which the relationship is valid (e.g. 10.05.2013).
End of relat.	Date that the relationship is valid until (e.g. Blank).



11. Repeat steps 9 and 10 to add all required partners (i.e. Owner, NZTA Property Manager, NZTA Network Manager, NZTA Property Management Company, and Property Manager):

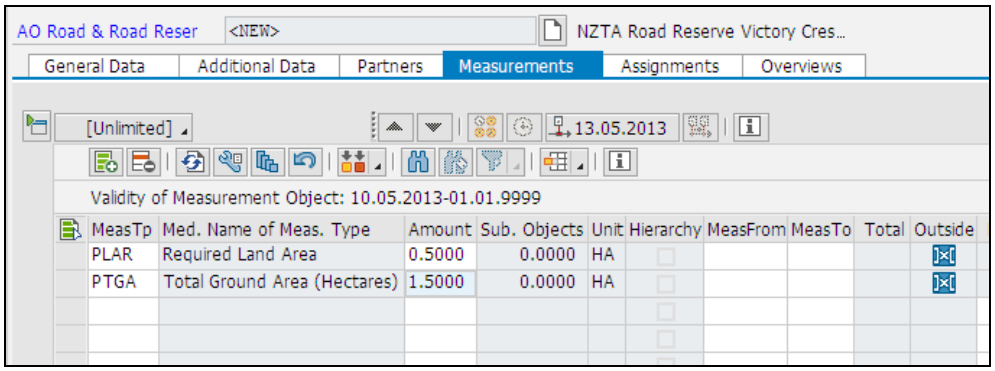
    Note: If you click **Save** without selecting the required partners, the system displays an error message at the bottom of the screen prompting you to choose a partner (or partners) that corresponds to the **User Status** selected in step 7 (e.g. MNGD – Managed).



12. Do the following in the **Measurements** tab, then press Enter to confirm the details entered:

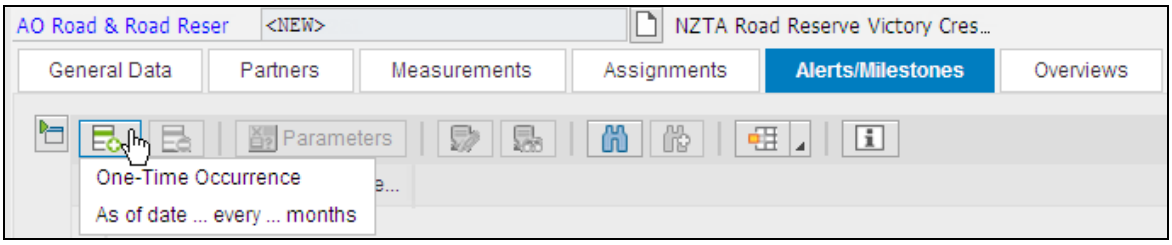
- Add the Required Land area (PLAR) and enter the amount.
- Add the Total Ground Area (PTGA) and enter the amount.
- Click the **Add Measurements** icon, to add any other relevant measurement types.

Note: If at any time, you wish to remove a measurement, select the line and click on the **Remove Measurements** icon.



13. To add an alert for the property:

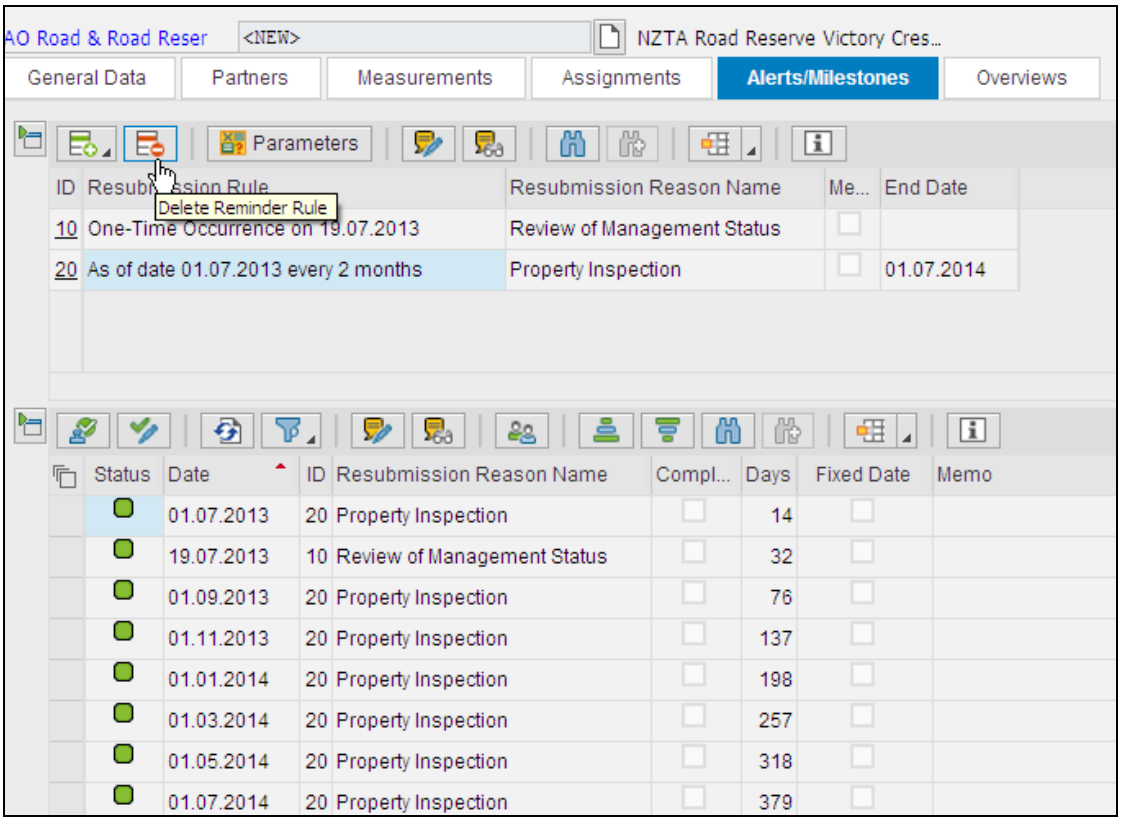
- click on the **Alerts/Milestone** tab, and
- click on the **Create Reminder Rule** icon and then select either:
  - One-Time-Occurrence, or
  - As of date... every... months.



14. In the **Create Reminder Rule** dialog box displayed, complete the following fields and then click the **Enter** icon to confirm:

- Resubmission Reason (e.g. M120 Review of Management Status).
- Date Parameters (e.g. Start Date, Interval in Months, End Date) as required.

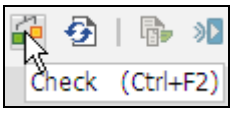
Result: The Resubmission Rules are displayed with the dates of the occurrences.



Notes:

- If at any time, you wish to remove an alert or milestone, select the line and click on the **Delete Reminder** icon.
- Resubmissions for the property are listed on the left-hand side pane when the **Resubmissions** option is selected (NB: Only for the user that set them up.)

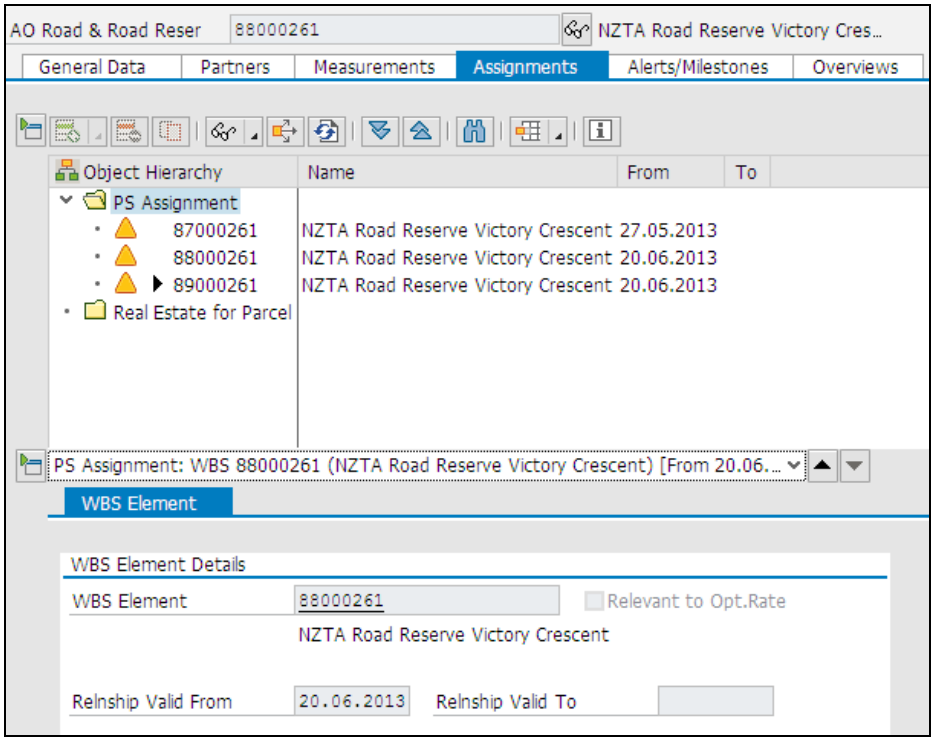
15. Click the **Check** icon on the top toolbar to verify the data and correct any errors.



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

Result: The following are displayed:

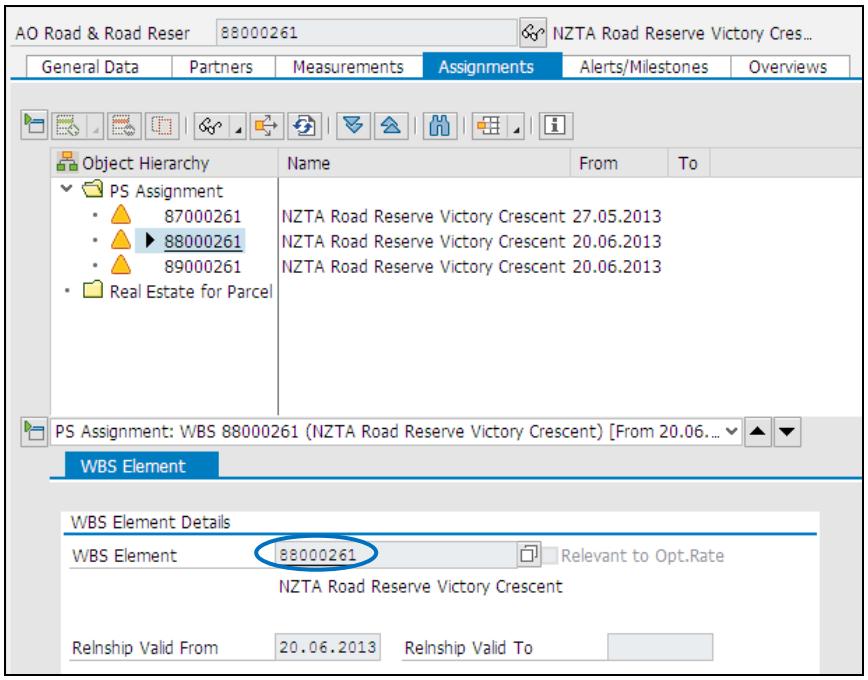
- On the **Assignment** tab, the following new WBS elements ID numbers are generated and referenced to the Property Record:
  - <87******> (Acquisition) is generated (even though it won't be used).
  - <88******> (Management) used for the property lease.
  - <89******> (Disposal).



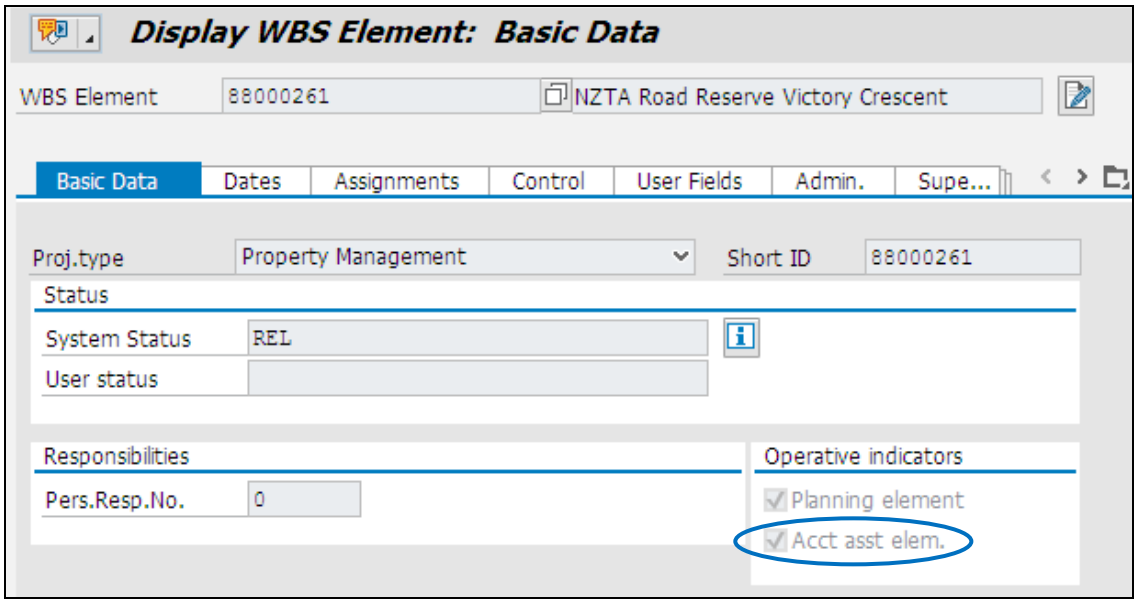
- At the bottom left-hand side of the screen, the message *'Architectural object ID no <88******> has been created'*.

17. 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 Element number (circled below), and



- 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.