

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: <ul style="list-style-type: none"> • 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.	<p>Do the following in the Address section:</p> <ul style="list-style-type: none"> • 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. <p>Note: This may take the system some time to process.</p> <p>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.</p>
7.	<p>In the Status Display section, to update the User Status field:</p> <ul style="list-style-type: none"> • click the Change User Status icon • select '04 MNGD - Managed', and • press Enter. <p>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.</p>
8.	<p>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:</p> <ul style="list-style-type: none"> • 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.	<p>Select the Partners tab and do 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. 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. <p>Result: The selected partner's details are entered in the Details section on the Partners tab.</p> <p>Notes:</p> <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> ○ 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.	<p>Complete the following fields In the Details section, then press Enter to confirm the details entered:</p> <ul style="list-style-type: none"> • Start relnship (e.g. 01.05.20123). • End of relat. (e.g. Blank).
11.	<p>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).</p> <p>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).</p>
12.	<p>Do the following in the Measurements tab, then press Enter to confirm the details entered:</p> <ul style="list-style-type: none"> • 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. <p>Note: If at any time you wish to remove a measurement, select the line and click on the Remove Measurements icon.</p>
13.	<p>To add an alert for the property:</p> <ul style="list-style-type: none"> • click on the Alerts/Milestone tab, and • click on the Create Reminder Rule icon and then select either: <ul style="list-style-type: none"> ○ One-Time-Occurrence. ○ As of date... every... months.
14	<p>In the Create Reminder Rule dialog box displayed, complete the following fields and then click the Enter icon to confirm:</p> <ul style="list-style-type: none"> • Resubmission Reason (e.g. M120 Review of Management Status) • Date Parameters (e.g. Start Date, Interval in Months, End Date) as required <p>Result: The Resubmission Rules are displayed with the dates of the occurrences.</p> <p>Notes:</p> <ul style="list-style-type: none"> • 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.	<p>Once there are no errors, click the Save icon.</p> <p>Result: The following are displayed:</p> <ul style="list-style-type: none"> • On the Assignment tab, the following new WBS elements ID numbers are generated and referenced to the Property Record: <ul style="list-style-type: none"> ○ <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 <i>'Architectural object ID no <88*****> has been created'</i>.

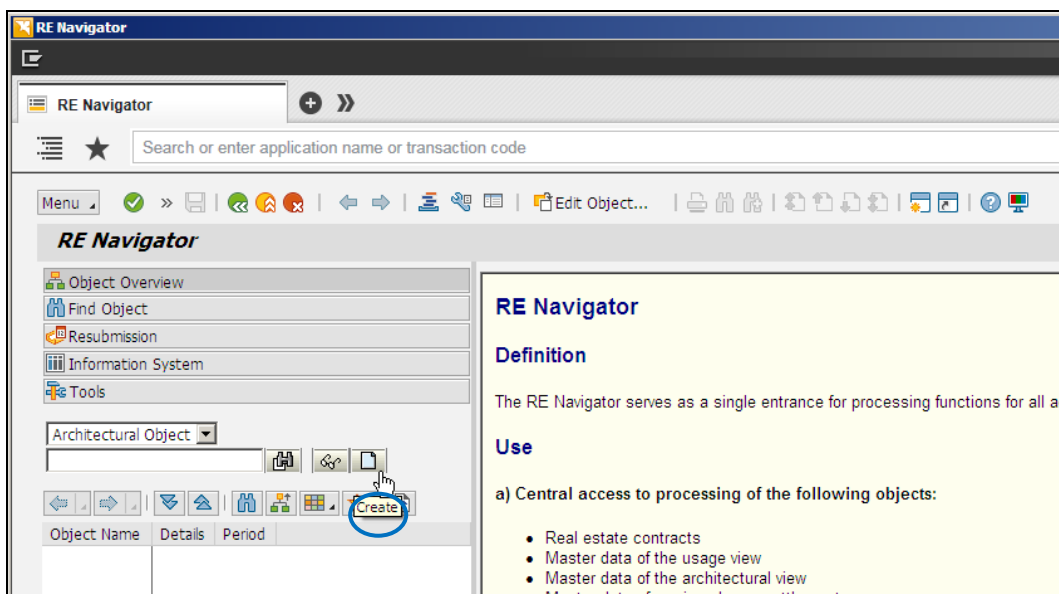
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Step	Action
17.	<p>As this property is under Management, the Property Management WBS must be authorised for use by the NZTA Property Manager.</p> <p>Do the following in the Architectural Object, to check that this has been done:</p> <ul style="list-style-type: none"> 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. <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>

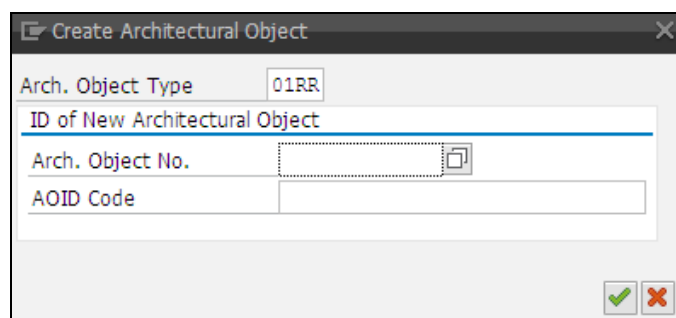
Detailed procedure

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 **Create** icon (circled below).

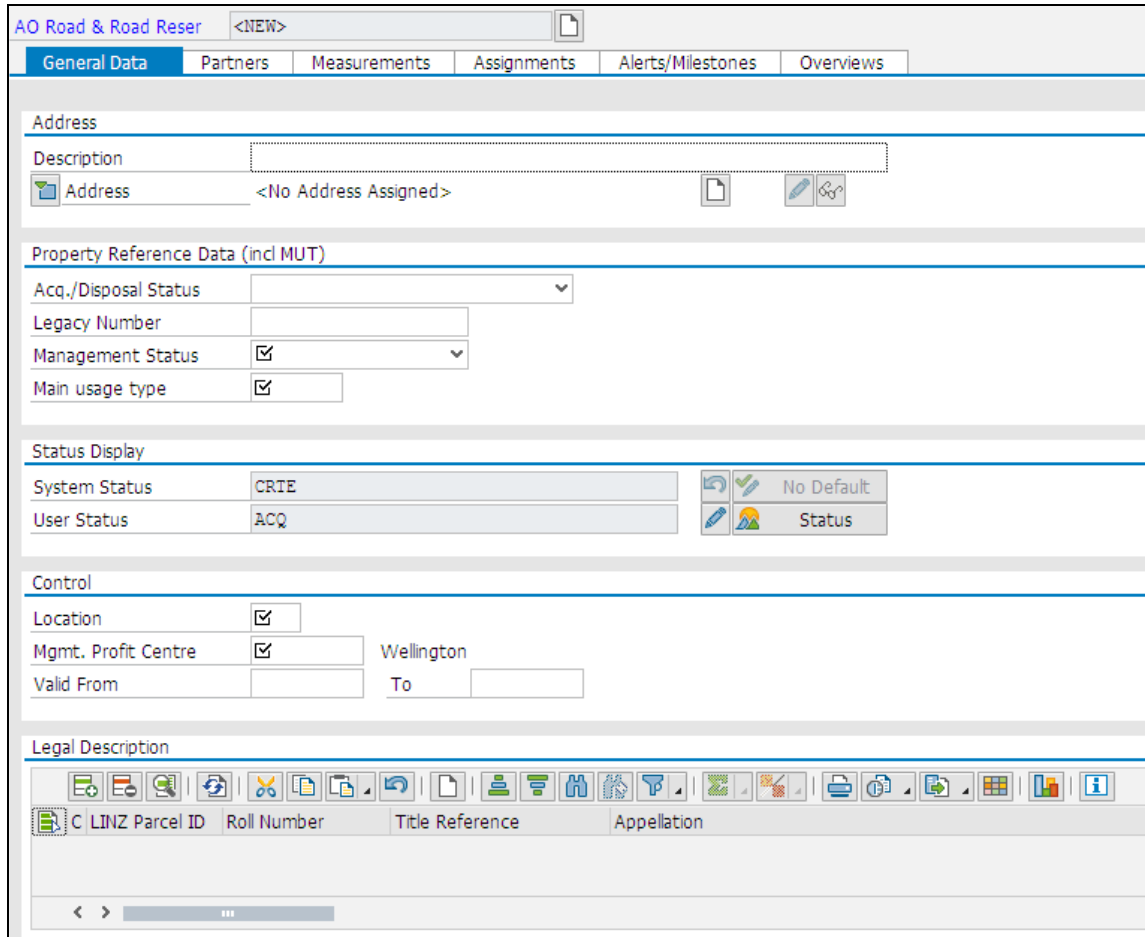


3. Complete the **Arch. Object Type** (select '01RR' for Road & Road Reserves) field in the **Create Architectural Object** dialog box and press Enter.



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.)



The screenshot shows the SAP 'General Data' screen for a new architectural object. The title bar reads 'AO Road & Road Reser <NEW>'. The 'General Data' tab is active, with other tabs including 'Partners', 'Measurements', 'Assignments', 'Alerts/Milestones', and 'Overviews'. The 'Address' section contains a 'Description' field and an 'Address' field with the value '<No Address Assigned>'. The 'Property Reference Data (incl MUT)' section includes fields for 'Acq./Disposal Status', 'Legacy Number', 'Management Status' (checked), and 'Main usage type' (checked). The 'Status Display' section shows 'System Status' as 'CRIE' and 'User Status' as 'ACQ'. The 'Control' section has 'Location' and 'Mgmt. Profit Centre' checked, with 'Wellington' entered in the 'Mgmt. Profit Centre' field. The 'Legal Description' section features a toolbar and a table with columns for 'C LINZ Parcel ID', 'Roll Number', 'Title Reference', and 'Appellation'. The table is currently empty.

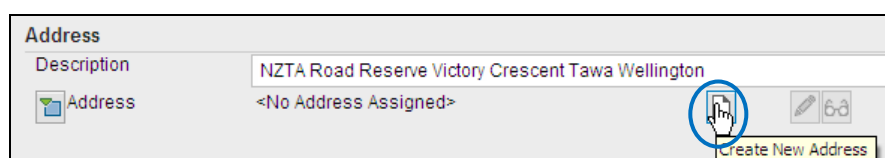
4. Enter the Name of the owner and the property address of the architectural object (e.g. NZTA Road Reserve Victory Crescent Tawa Wellington) in the Description field of the **Address** section.

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:

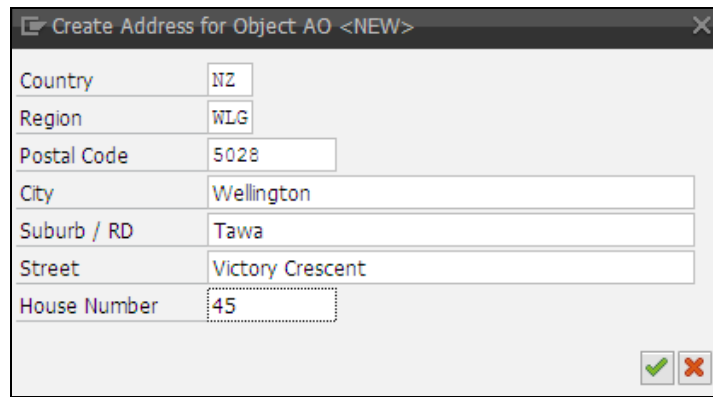
- Click the **Create New Address** icon (circled below).



- 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.



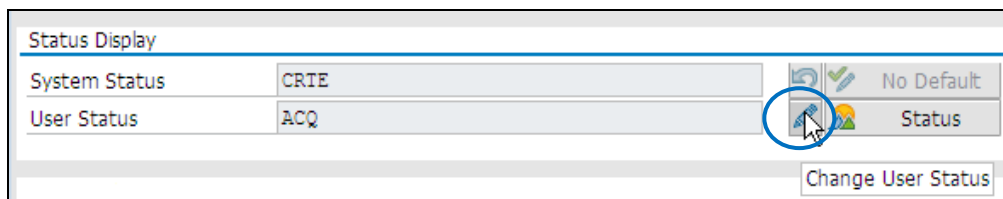
Country: NZ
 Region: WLG
 Postal Code: 5028
 City: Wellington
 Suburb / RD: Tawa
 Street: Victory Crescent
 House Number: 45

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

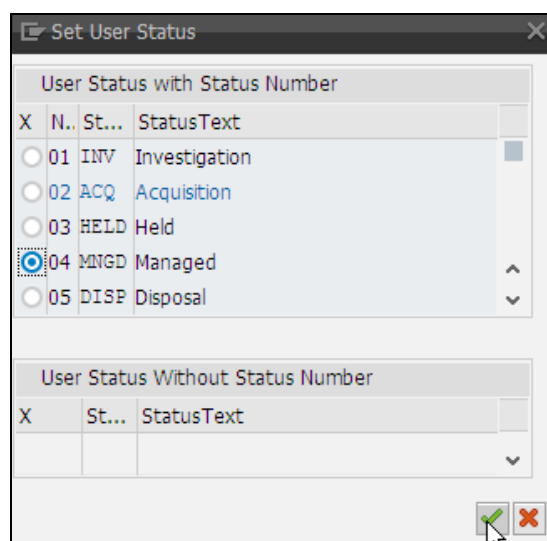
Result: The **Create Address Architectural Object** dialog box displays the detail you have just entered. Click the **Enter** icons in the open dialog boxes to return to the **General Data** tab of the **Architect. Object Property <NEW> Create: General Data** screen.

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.



Status Display	
System Status	CRIE
User Status	ACQ

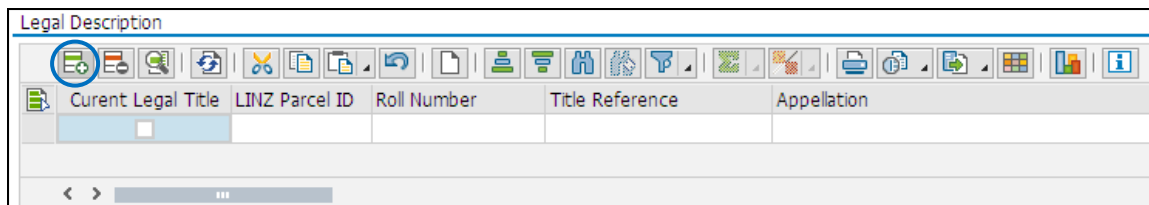


User Status with Status Number			
X	N..	St...	StatusText
<input type="radio"/>	01	INV	Investigation
<input type="radio"/>	02	ACQ	Acquisition
<input type="radio"/>	03	HELD	Held
<input checked="" type="radio"/>	04	MNGD	Managed
<input type="radio"/>	05	DISP	Disposal

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).



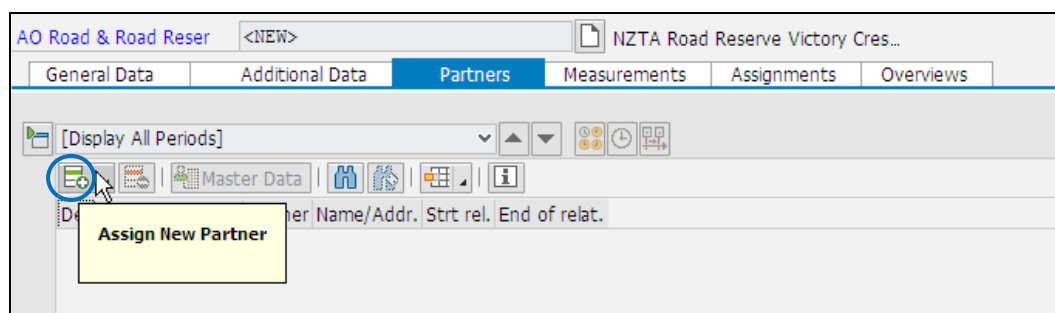
9. Select the **Partners** tab and do the following:

- 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.

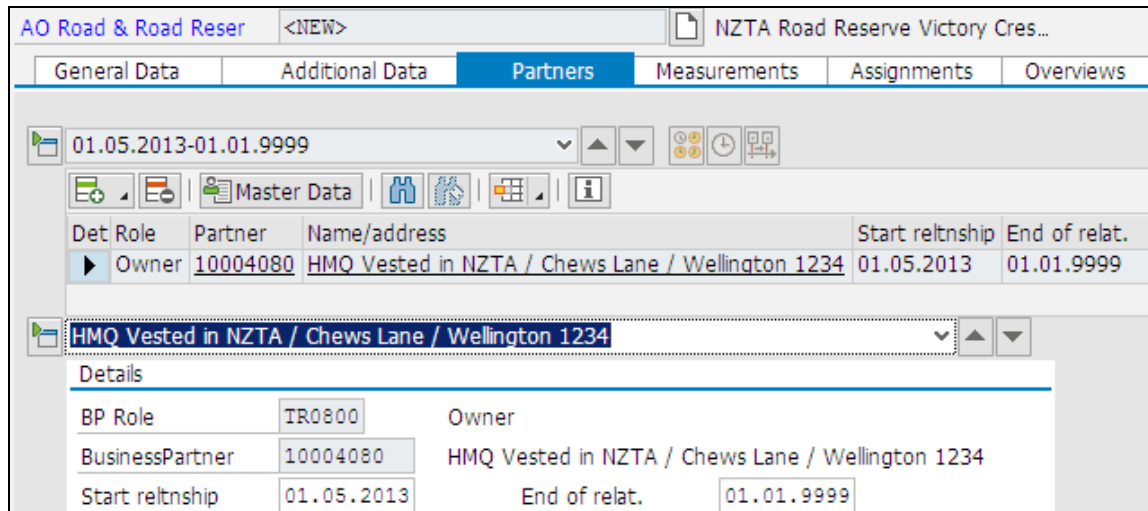
Notes:

- 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 relnshp.	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).

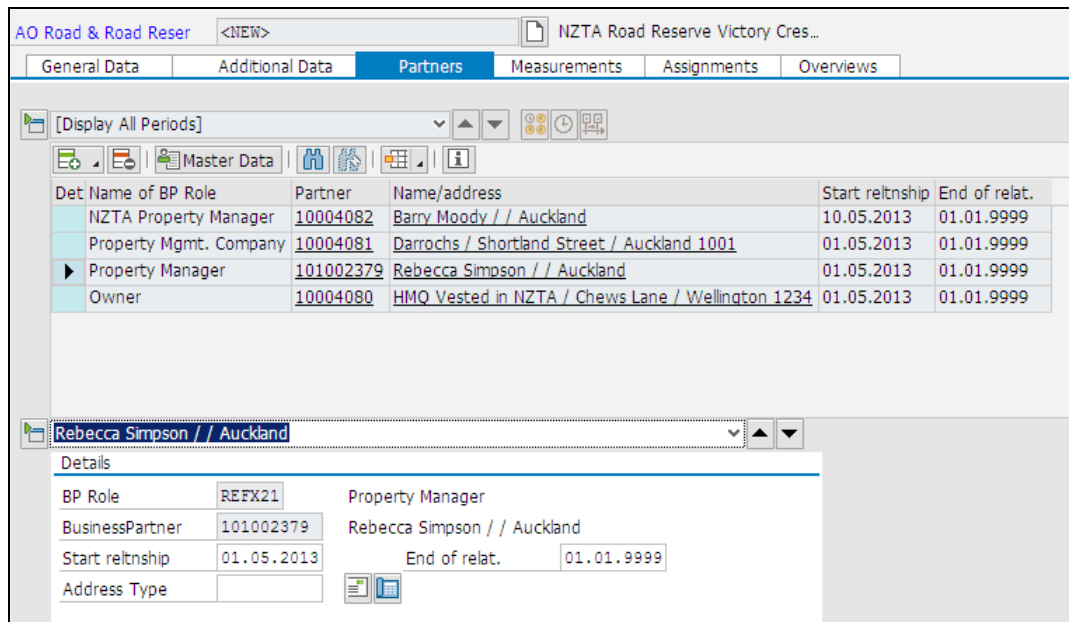


Det Role	Partner	Name/address	Start relnshp	End of relat.
Owner	10004080	HMQ Vested in NZTA / Chews Lane / Wellington 1234	01.05.2013	01.01.9999

Details				
BP Role	TR0800	Owner		
BusinessPartner	10004080	HMQ Vested in NZTA / Chews Lane / Wellington 1234		
Start relnshp	01.05.2013	End of relat.	01.01.9999	

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).



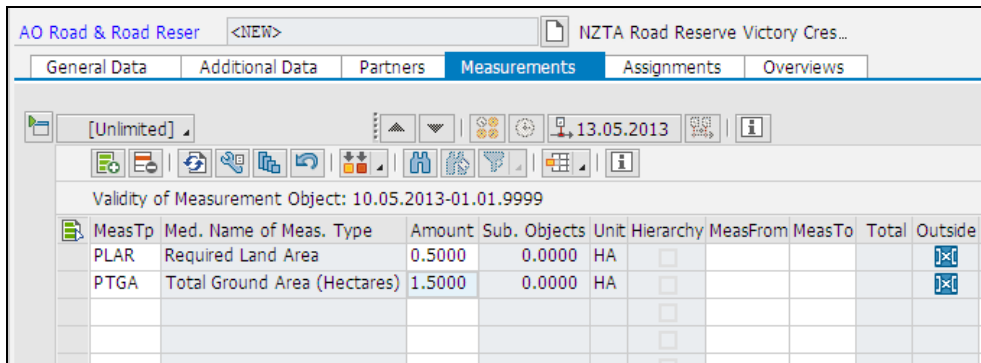
Det Name of BP Role	Partner	Name/address	Start relnshp	End of relat.
NZTA Property Manager	10004082	Barry Moody // Auckland	10.05.2013	01.01.9999
Property Mgmt. Company	10004081	Darrochs / Shortland Street / Auckland 1001	01.05.2013	01.01.9999
Property Manager	101002379	Rebecca Simpson // Auckland	01.05.2013	01.01.9999
Owner	10004080	HMQ Vested in NZTA / Chews Lane / Wellington 1234	01.05.2013	01.01.9999

Details				
BP Role	REFX21	Property Manager		
BusinessPartner	101002379	Rebecca Simpson // Auckland		
Start relnshp	01.05.2013	End of relat.	01.01.9999	
Address Type				

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.

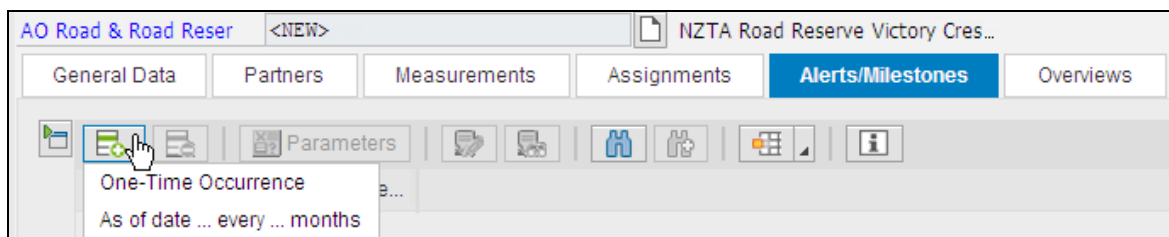
Note: If at any time, you wish to remove a measurement, select the line and click on the **Remove Measurements** icon.



MeasTp	Med. Name of Meas. Type	Amount	Sub. Objects	Unit Hierarchy	MeasFrom	MeasTo	Total	Outside
PLAR	Required Land Area	0.5000	0.0000	HA				
PTGA	Total Ground Area (Hectares)	1.5000	0.0000	HA				

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.

AO Road & Road Reser <NEW> NZTA Road Reserve Victory Cres...

General Data Partners Measurements Assignments **Alerts/Milestones** Overviews

Parameters

ID	Resubmission Rule	Resubmission Reason Name	Me...	End Date
10	One-Time Occurrence on 19.07.2013	Review of Management Status	<input type="checkbox"/>	
20	As of date 01.07.2013 every 2 months	Property Inspection	<input type="checkbox"/>	01.07.2014

Delete Reminder Rule

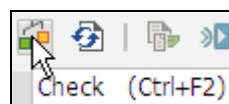
Status Date ID Resubmission Reason Name Compl... Days Fixed Date Memo

<input type="checkbox"/>	01.07.2013	20	Property Inspection	<input type="checkbox"/>	14	<input type="checkbox"/>	
<input type="checkbox"/>	19.07.2013	10	Review of Management Status	<input type="checkbox"/>	32	<input type="checkbox"/>	
<input type="checkbox"/>	01.09.2013	20	Property Inspection	<input type="checkbox"/>	76	<input type="checkbox"/>	
<input type="checkbox"/>	01.11.2013	20	Property Inspection	<input type="checkbox"/>	137	<input type="checkbox"/>	
<input type="checkbox"/>	01.01.2014	20	Property Inspection	<input type="checkbox"/>	198	<input type="checkbox"/>	
<input type="checkbox"/>	01.03.2014	20	Property Inspection	<input type="checkbox"/>	257	<input type="checkbox"/>	
<input type="checkbox"/>	01.05.2014	20	Property Inspection	<input type="checkbox"/>	318	<input type="checkbox"/>	
<input type="checkbox"/>	01.07.2014	20	Property Inspection	<input type="checkbox"/>	379	<input type="checkbox"/>	

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.)

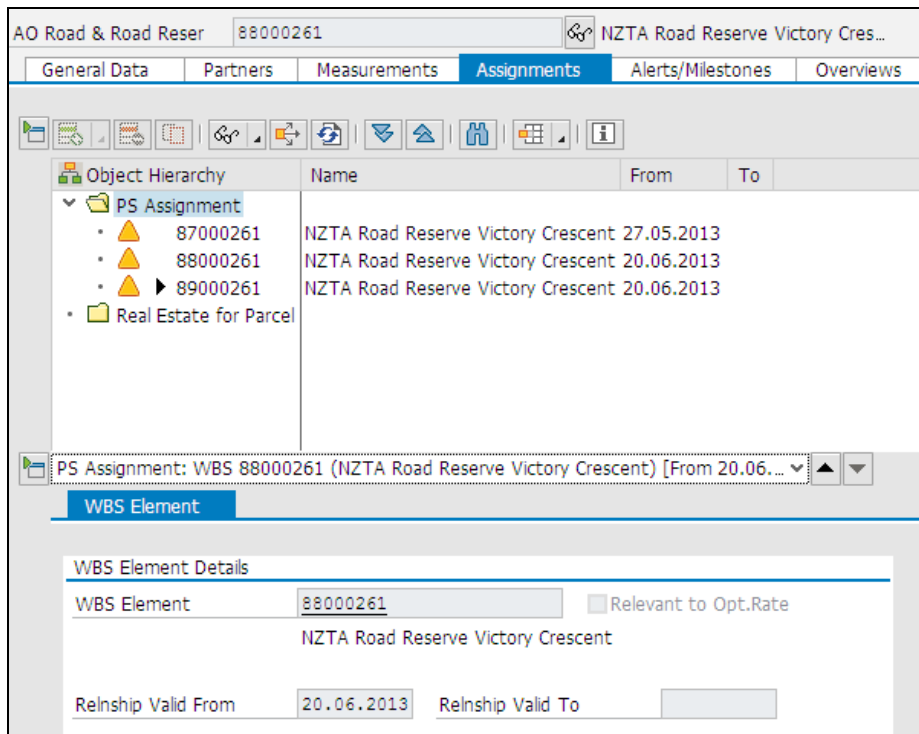
15. Click the **Check** icon on the top toolbar to verify the data and correct any errors.



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).



AO Road & Road Reser 88000261 NZTA Road Reserve Victory Cres...

General Data Partners Measurements **Assignments** Alerts/Milestones Overviews

Object Hierarchy Name From To

- PS Assignment
 - 87000261 NZTA Road Reserve Victory Crescent 27.05.2013
 - 88000261 NZTA Road Reserve Victory Crescent 20.06.2013
 - 89000261 NZTA Road Reserve Victory Crescent 20.06.2013
 - Real Estate for Parcel

PS Assignment: WBS 88000261 (NZTA Road Reserve Victory Crescent) [From 20.06.2013]

WBS Element

WBS Element Details

WBS Element 88000261 Relevant to Opt.Rate

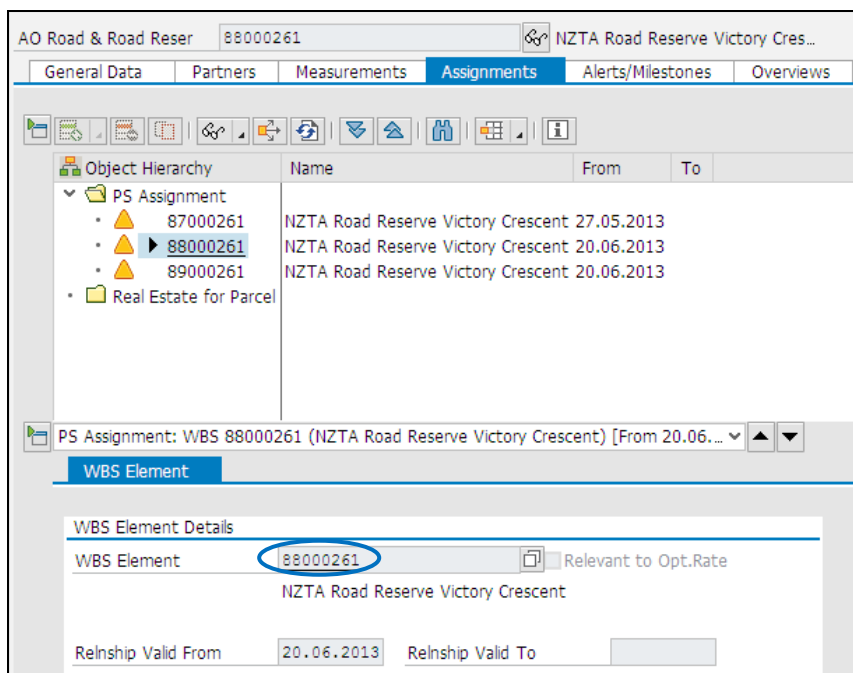
NZTA Road Reserve Victory Crescent

Relnship Valid From 20.06.2013 Relnship Valid To

- 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



AO Road & Road Reser 88000261 NZTA Road Reserve Victory Cres...

General Data Partners Measurements **Assignments** Alerts/Milestones Overviews

Object Hierarchy Name From To

- PS Assignment
 - 87000261 NZTA Road Reserve Victory Crescent 27.05.2013
 - 88000261 NZTA Road Reserve Victory Crescent 20.06.2013
 - 89000261 NZTA Road Reserve Victory Crescent 20.06.2013
 - Real Estate for Parcel

PS Assignment: WBS 88000261 (NZTA Road Reserve Victory Crescent) [From 20.06.2013]

WBS Element

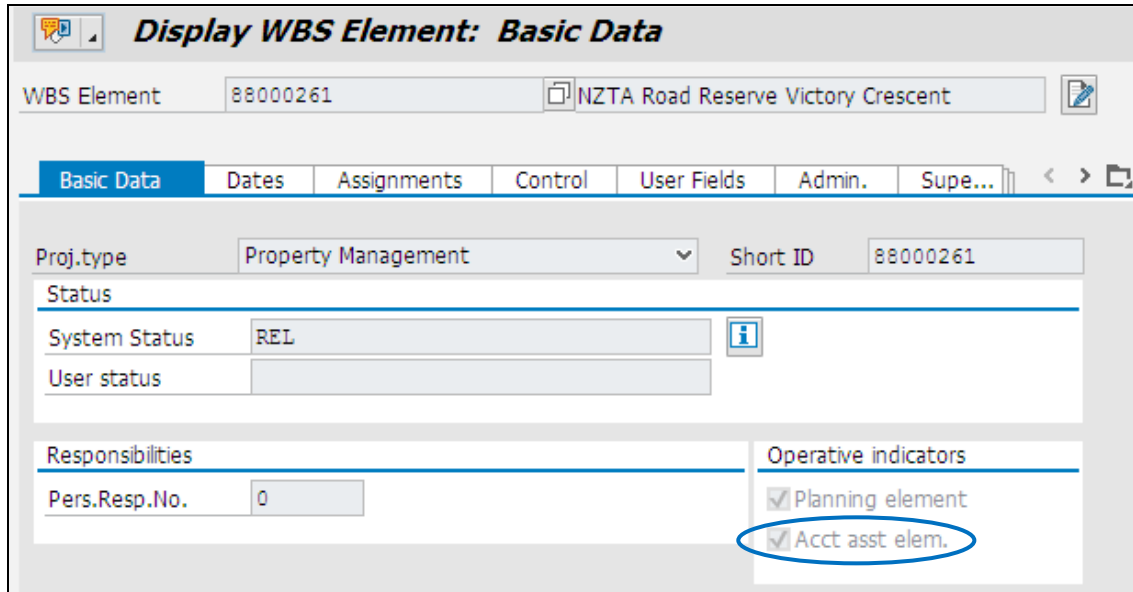
WBS Element Details

WBS Element 88000261 Relevant to Opt.Rate

NZTA Road Reserve Victory Crescent

Relnship Valid From 20.06.2013 Relnship Valid To

- 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).



The screenshot shows the SAP 'Display WBS Element: Basic Data' interface. At the top, the WBS Element is '88000261' and the object is 'NZTA Road Reserve Victory Crescent'. The 'Basic Data' tab is selected. The 'Proj.type' is 'Property Management' and the 'Short ID' is '88000261'. Under the 'Status' section, 'System Status' is 'REL'. Under the 'Operative indicators' section, both 'Planning element' and 'Acct asst elem.' are checked. The 'Acct asst elem.' checkbox is circled in blue.

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.