

## RE80: Create Property (Investigation) Transaction Guide

This guide shows you how to use RE80 (Real Estate Navigator) to create an architectural object for Property. Use either the short description quick-step procedure set out below or refer to the more detailed description with screen shots which follows.

This transaction is used to create an Architectural object for an Investigation project and is part of the PM5.1 Create Property Record - Investigation process.

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.	Select <b>Object Overview</b> in the Navigation area.
2.	Select <b>Architectural Object</b> from the drop-down list, then click the <b>Create</b> icon.
3.	<p>Complete the <b>Arch. Object Type</b> (select '01PR' for Property) field in the <b>Create Architectural Object</b> dialog box and press Enter.</p> <p><b>Note:</b> Delete any data that defaults into the Arch. Object No. or AOID Code fields.</p> <p><b>Result:</b> The <b>Architect. Object &lt;Type&gt; &lt;NEW&gt; Create: General Data</b> screen opens in the right-hand pane with the default <b>General Data</b> tab displaying.</p>
4.	<p>Do the following in the <b>Address</b> section:</p> <ul style="list-style-type: none"> <li>• Complete the <b>Description</b> field (e.g. John Smith 18 Hardie Crescent). Note that this free text field should contain the owner name and property address.</li> <li>• Click the <b>Create New Address</b> icon. (The <b>Create address for Object AO &lt;New&gt;</b> dialog box displays.)</li> </ul> <p><b>Note:</b> Complete the following fields (press Tab to move between fields – do not press enter until all fields have been completed):</p> <ul style="list-style-type: none"> <li>• Enter the Country, Region, City, Suburb, Street, House Number (e.g. NZ, WLG, 6011, Wellington, Te Aro, Abel Smith Street, 13).</li> <li>• Press Enter. (The <b>Create Address Architectural Object</b> dialog box displays the details you have just entered.)</li> <li>• Press Enter to return to the <b>General Data</b> tab of the <b>Architect. Object Property &lt;NEW&gt; Create: General Data</b> screen.</li> </ul>
5.	<p>Complete the following fields in the <b>Property Reference Data</b> section:</p> <ul style="list-style-type: none"> <li>• Acq./Disposal Status (e.g. Awaiting Purchase Instruction).</li> <li>• Full/partial Purchase (e.g. Land Entry only).</li> <li>• Property Interest (e.g. 10 Freehold).</li> <li>• Legacy Number (e.g. PADS444555), if known.</li> <li>• Management Status (e.g. Not Purchased Yet).</li> </ul> <p><b>Note:</b> 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.</p>

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Step	Action
6.	Complete the User Status (e.g. INV – Investigation) field in the <b>Status Display</b> section. (To change this, click the <b>Change User Status</b> icon (the pencil), and search for/select INV – Investigation.)
7.	Complete the following fields in the <b>Control</b> section (if required): <ul style="list-style-type: none"> <li>• Location (e.g. 00124 Wellington).</li> <li>• Mgmt. Profit Center (e.g. 7009 Wellington).</li> <li>• Valid From (e.g. today’s date or 01.01.1900).</li> <li>• To (e.g. future date, if known).</li> </ul>
8.	Complete the following fields in the <b>Legal Description</b> section, after clicking the <b>Insert Row</b> icon: <ul style="list-style-type: none"> <li>• Roll Number (e.g. 1111545454).</li> <li>• Appellation (e.g. Lot 525 DP123).</li> <li>• Current Title (tick box).</li> <li>• Property Title (e.g. Computer Freehold Register Reference - CFR CB1121 222 or GAZ 2007 p222).</li> <li>• LINZ parcel ID (e.g. LINZ 9999ABC).</li> </ul>
9.	Complete the following fields on the <b>Additional Data</b> tab (the options on this tab will vary depending on the type of object selected): <ul style="list-style-type: none"> <li>• Initiative (if required).</li> <li>• Maintenance Level (e.g. 00012 Maintain at current level).</li> <li>• Building Condition (e.g. 03 Good).</li> <li>• Main Usage Type (e.g. 15 Commercial/Industrial Unimproved).</li> </ul>
10.	Do the following on the <b>Partners</b> tab: <ul style="list-style-type: none"> <li>• Click the <b>Assign New Partner</b> icon.</li> <li>• Select an option from the drop-down list (e.g. Mandatory partners for INV are: NZTA Project Manager and Owner).</li> <li>• In the <b>Business Partner Search</b> dialog box that displays, either: <ul style="list-style-type: none"> <li>○ use search terms to find an existing partner (e.g. John Smith for Owner), or</li> <li>○ select <b>Create in Role</b> and enter the new details for the person/organisation (for more detail, refer to the <a href="#">RE80 (Create Business Partner)</a> transaction guide.</li> </ul> </li> <li>• Complete the Start reltnship and End of relat. fields (e.g. 01.01.2013 to 31.12.2014).</li> <li>• Repeat the steps above for each additional role to be added.</li> </ul> <p><b>Note:</b> If you click <b>Save</b> 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 <b>User Status</b> selected in step 6 (e.g. Inv - Investigation).</p>
11.	Do the following in the <b>Measurements</b> tab (if known at the time): <ul style="list-style-type: none"> <li>• Note the Gross floor Area (PGFA).</li> <li>• Note the Required Land area (PLAR).</li> <li>• Note the Total Ground Area (PTGA).</li> <li>• Select and note any other relevant measurement types, if known.</li> </ul>

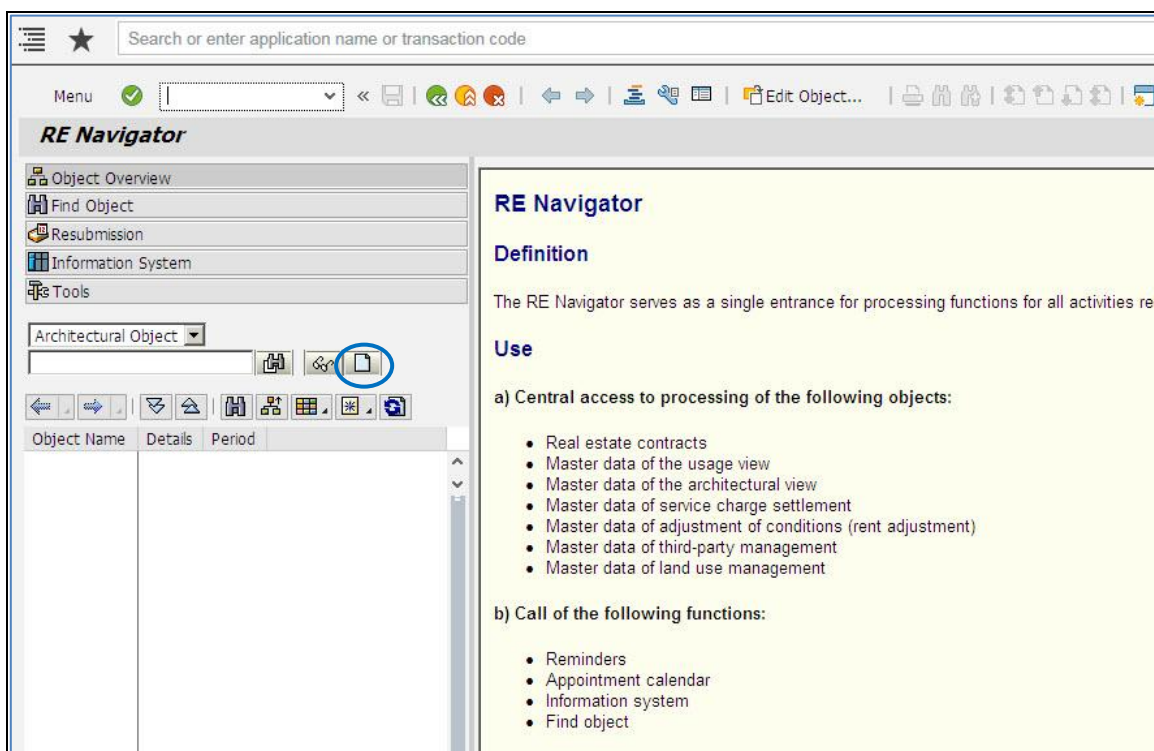
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Step	Action
12.	<p>Do the following in the <b>Alerts/Milestones</b> tab, if required, then press Enter:</p> <ul style="list-style-type: none"> <li>Click the Create Reminder Rule icon.</li> <li>Select either 'One Time occurrence' or 'As of date...'</li> <li>Enter a Resubmission Reason and Date in the Create Reminder Rule dialog box.</li> </ul> <p><b>Note:</b> Possible options for this type of project might include:</p> <ul style="list-style-type: none"> <li>Instructions.</li> <li>Initial.</li> <li>Preliminary Entry.</li> </ul>
13.	<p>Click <b>Save</b>. The message <i>'Architectural object ID no 88***** has been created'</i> displays in the bottom left-hand side of the screen.</p>

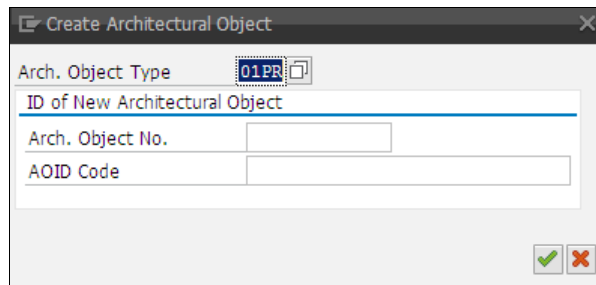
## Detailed procedure

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, then click the **Create** icon (circled below).



3. Complete the **Arch. Object Type** (select '01PR' for Property) field in the **Create Architectural Object** dialog box and press Enter.

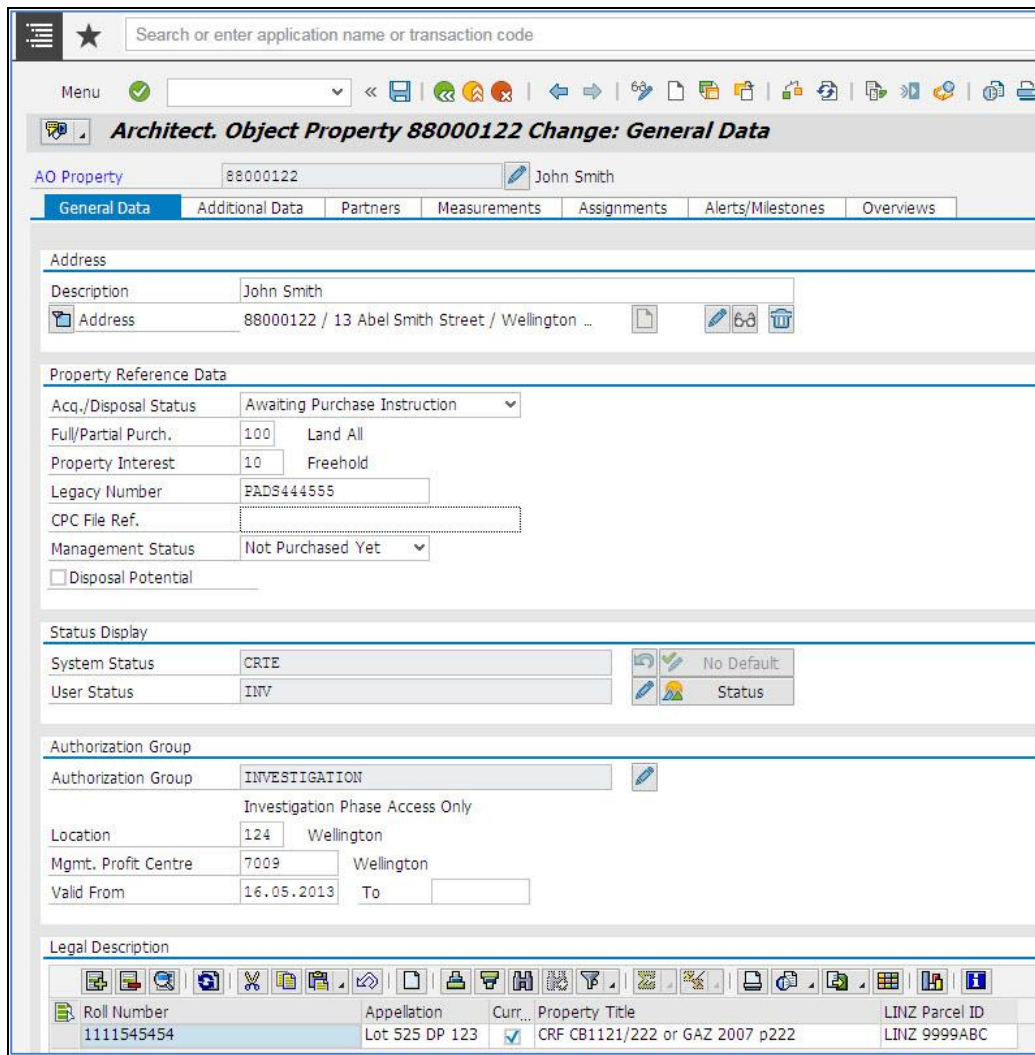


**Note:** Delete any data that defaults into the Arch. Object No. or AOID Code fields.

**Result:** The **Architect. Object <Type> <NEW> Create: General Data** screen opens in the right-hand pane with the default **General Data** tab displaying.

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

Field	Description
Description	Enter a description of the property investigation (e.g. John Smith 18 Hardie Crescent).
Address	<p>Click the <b>Create New Address</b> icon. (The <b>Create address for Object AO &lt;New&gt;</b> dialog box displays.)</p> <p><b>Note:</b> Complete the following fields (press Tab to move between fields – do not press enter until all fields have been completed):</p> <ul style="list-style-type: none"> <li>Enter the Country, Region, City, Suburb, Street, House Number (e.g. NZ, WLG, 6011, Wellington, Te Aro, Abel Smith Street, 13).</li> <li>Press Enter. (The <b>Create Address Architectural Object</b> dialog box displays the details you have just entered.)</li> <li>Press Enter to return to the <b>General Data</b> tab of the <b>Architect. Object Property &lt;NEW&gt; Create: General Data</b> screen.</li> </ul>



Search or enter application name or transaction code

Menu

**Architect. Object Property 88000122 Change: General Data**

AO Property 88000122 John Smith

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

Address

Description John Smith

Address 88000122 / 13 Abel Smith Street / Wellington ...

Property Reference Data

Acq./Disposal Status Awaiting Purchase Instruction

Full/Partial Purch. 100 Land All

Property Interest 10 Freehold

Legacy Number PADS444555

CPC File Ref.

Management Status Not Purchased Yet

Disposal Potential

Status Display

System Status CRTE No Default

User Status INV Status

Authorization Group

Authorization Group INVESTIGATION Investigation Phase Access Only

Location 124 Wellington

Mgmt. Profit Centre 7009 Wellington

Valid From 16.05.2013 To

Legal Description

Roll Number	Appellation	Curr...	Property Title	LINZ Parcel ID
111154544	Lot 525 DP 123	<input checked="" type="checkbox"/>	CRF CB1121/222 or GAZ 2007 p222	LINZ 9999ABC

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

Field	Description
Acq./Disposal Status	Current status of the property (e.g. select 'Awaiting Purchase Instruction' for a temporary occupation).
Full/Partial Purch.	Indicates the purchase quantity or Financial Interest in a property (e.g. Land all).
Property Interest	Description of the ownership type of a property (e.g. Freehold).
Legacy number	The legacy system PADS and/or OPM references may be stored in this field, or supplier references/job number (e.g. 444555).
Management Status	Description of the current status of the property for NZTA (e.g. Not purchased yet).

**Notes:**

- The CPC file ref. field does not need to be completed for Investigation projects.
- 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.

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

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

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

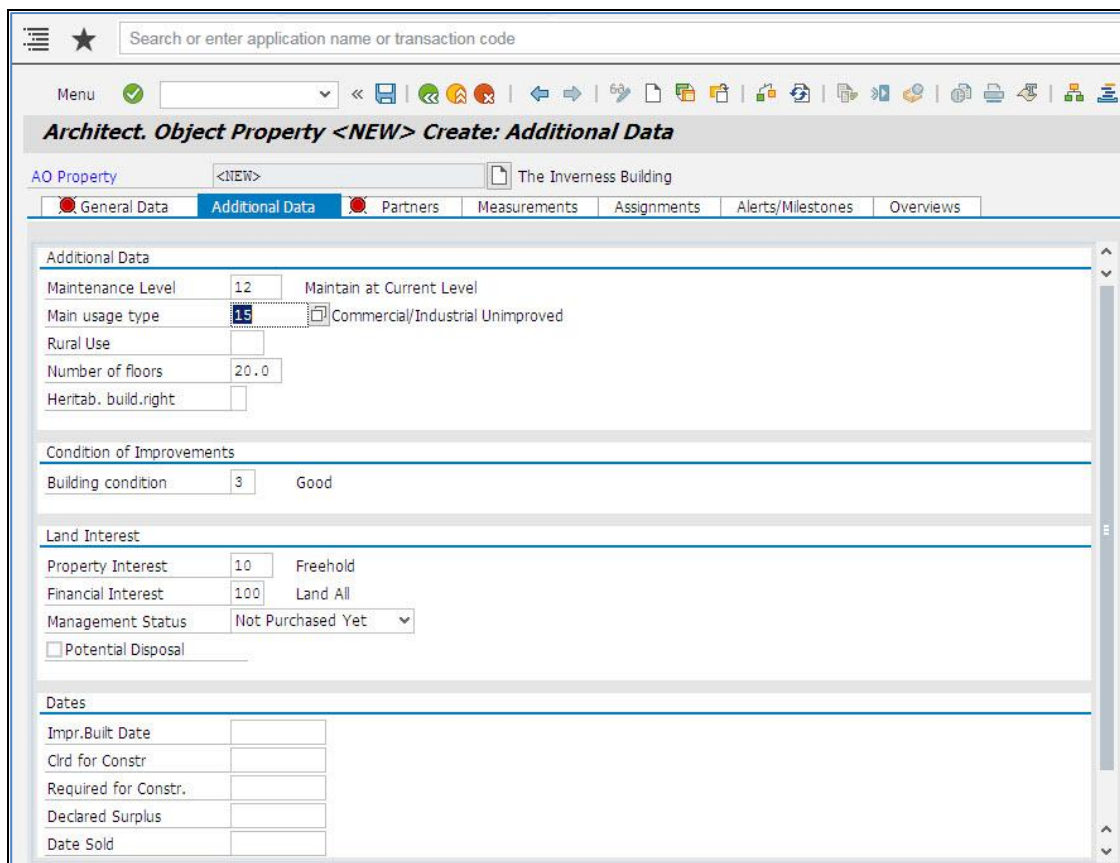
Field	Description
Location	Region managing the property (e.g. 00124 Wellington).
Mgmt. Profit Centre	This is the Profit Centre adopted in the automatic creation of the accounting object. It is essential that this field is correct from the initial creation of the Investigation Property record, and at the time the user status is updated to Management, the trigger point for creation (e.g. 7009 Wellington).  <b>Note:</b> 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 or 01.01.1900).  <b>Note:</b> <ul style="list-style-type: none"> <li>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).</li> <li>The <b>Partners</b> tab must also contain the exact same start dates otherwise it will not save.</li> </ul>
To	End date for the Property (e.g. future date, if known).

8. Complete the following fields in the **Legal Description** section, after clicking the **Insert Row** icon:

Field	Description
Roll Number	Valuation number (e.g. 1111545454).
Appellation	Legal name/description of the property (Lot 525 DP123).
Current Title (tick box)	Select if the Appellation and Property Titles are current.
Property Title	The Computer Freehold Register Reference (e.g. CFR CB1121/222 or GAZ 2007 p222).
LINZ parcel ID	The LINZ reference title of the property (e.g. LINZ 9999ABC).

9. 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
Initiative	The Initiative number relates to the project that the property is being purchased for. The Initiative number derives from PPM module of SAP.
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. 15 Commercial/Industrial unimproved).  <b>Note:</b> An accurate assessment is essential for this field as management company fees are determined from it.



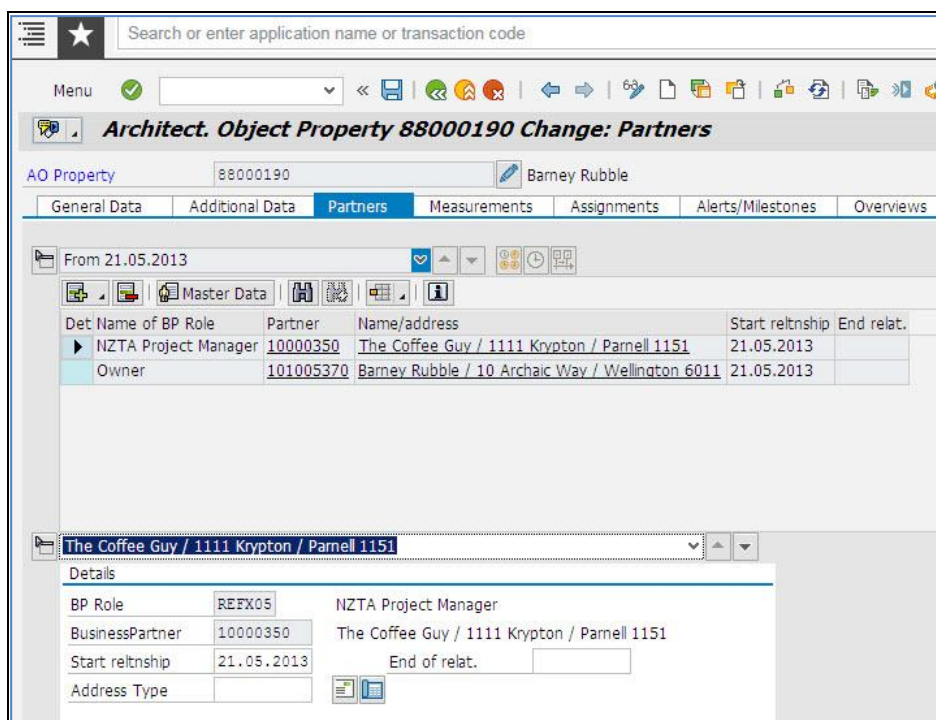
The screenshot shows the SAP 'Architect. Object Property <NEW> Create: Additional Data' form. The 'Additional Data' tab is active, showing the following fields and values:

- Maintenance Level:** 12 (Maintain at Current Level)
- Main usage type:** 15 (Commercial/Industrial Unimproved)
- Rural Use:** (empty)
- Number of floors:** 20.0
- Heritab. build.right:** (empty)
- Condition of Improvements:**
  - Building condition:** 3 (Good)
- Land Interest:**
  - Property Interest:** 10 (Freehold)
  - Financial Interest:** 100 (Land All)
  - Management Status:** Not Purchased Yet
  - Potential Disposal
- Dates:**
  - Impr.Built Date:** (empty)
  - Clrd for Constr:** (empty)
  - Required for Constr.:** (empty)
  - Declared Surplus:** (empty)
  - Date Sold:** (empty)

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

- Click the **Assign New Partner** icon (circled in blue).
- Select an option from the drop-down list. For an Investigation Project the mandatory Business Partners are:
  - NZTA Project Manager.
  - Owner.
- In the **Business Partner Search** dialog box that displays, either:
  - use search terms to find an existing partner (e.g. John Smith for Owner), 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 relationship and End of relationship fields (e.g. 01.01.2013 to 31.12.2014). (Note that the Business Partner fields start date must correspond to the Validity of the object specified on the General tab.)
- Repeat the steps above for each additional role to be added.

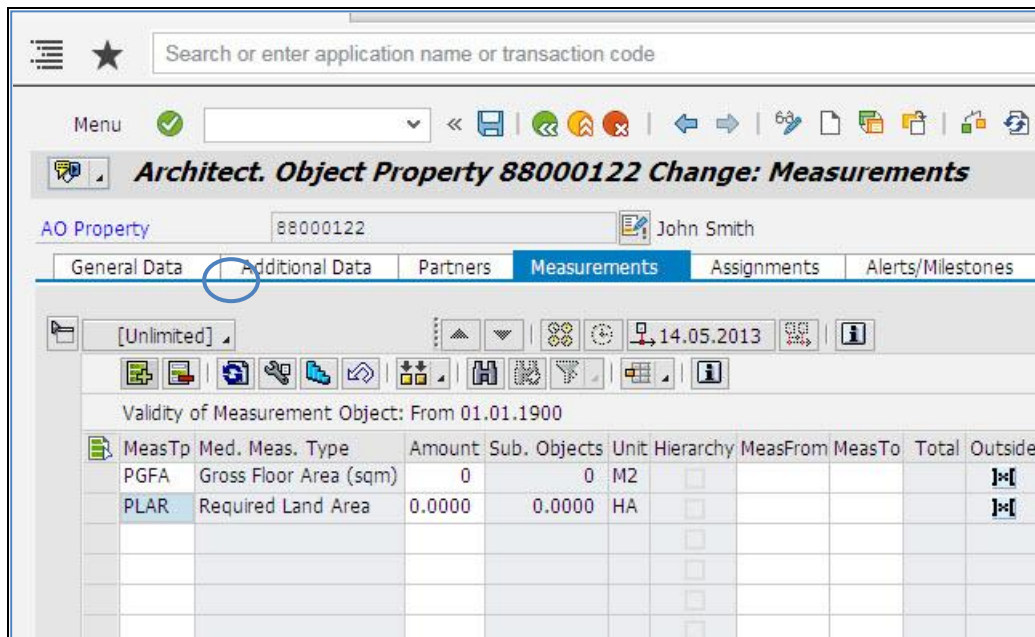
**Note:** If you click **Save** without selecting the mandatory partners, the system will display an error message at the bottom of the screen prompting you to choose a partner (or partners) that corresponds to the **User Status** selected in step 6 (e.g. Inv - Investigation).



11. Do the following in the **Measurements** tab:

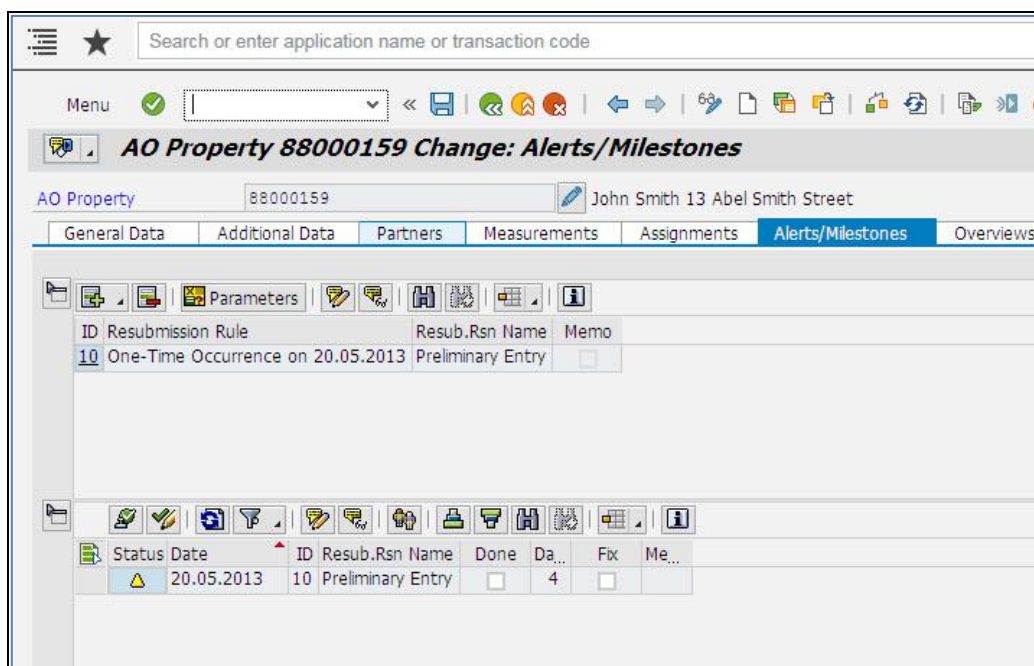
- Note the Gross floor Area (PGFA).
- Note the Required Land area (PLAR).
- Select and note any other relevant measurement types.





12. 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.
- Press Enter.



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