SAP Property – Field Description

This document lists the fields that appear in the SAP Architectural Object screens and provides NZTA's guidance on how the fields should be completed, plus the fields that you can search on. Please note that SAP is case sensitive.

Any queries, contact Iain Gillies, NZTA.

Architectural Objects (searchable)	The AO's are created in order to restrict the main property type to full real property interests in land. This gives meaning to statistics like total area, total value. The options are: 1. <u>Easements</u> – rights either for NZTA over a neighbouring property or rights a neighbouring property has over an NZTA property. 2. <u>Property (land, buildings)</u> – the main entry for property 3. <u>Road and Road Reserves</u> – to be used when management property entries are created to document tenancies and other operations in road reserve. 4. <u>Segregation Strips</u> – small strips of land (typically 75mm wide) created when land is legalised in order to prevent the land adjoining the highway from having a legal right to access the highway. 5. <u>Temporary Occupation</u> – a lease, licence or an entry agreement on land, generally to research land conditions (geotech) or to enable construction. Use this interest if the temporary occupation will not become a full purchase later.

General Data

Field Name	Description
Address	
Description (searchable)	Original owner – Property Address, Suburb (Main Usage) e.g. Turner & Smith - 345 Rough Lane, Cambridge (Residential). The idea is to have one field that covers these aspects all at once. The intention is to capture the core descriptors succinctly in one field. The address and other fields will capture the detail. This field may be more appropriate than the address fields to cover rough directions like 100m west of the SH 1/SH 36 intersection. For example: Scofield - land at NW corner of 2334 SH 12/Huntly (Bare land) Note the main usage descriptions as follows. If the Main Usage is not in the following list, then use a word to best describe the use of the property. Residential Lifestyle Orchard Bare Land Grazing Land Commercial Industrial Dairy

Forestry

Other Descriptions for other types of Property should be as follows.

Road Reserves should be named as follows;

Should be	NOT
Road Reserve – adjoining Westlands Golf Club, SH 23	Rd Reserve – Westlands Golf Club Sh23
Road Reserve – Mihi Bridge, SH 5, Reporoa	Road reserve @ Mihi Bridge Reporoa (SH 5)

Rail Corridor should be named as follows;

Should be	NOT
Rail Corridor - Behind 16 Hull Road, Mt Maunganui	16 Hull Road, Mt Maunganui (Rail Corridor)
Rail Corridor – Behind 118/156 Newton Street, Mt Maunganui	Rail Corridor @ 118-156 Newton Street

Legal Road should be named as follows;

Should be	NOT
Legal Road – adjoining Dunn, 1105 SH 2, Tamahere	Legal Road @ CB Dunn
Legal Road – adjoining Smith, 123 Smith Street, Hamilton	Legal Road adjoining Smith, DS and Smith GR

Other Examples of naming conventions are as follows;

Should be	NOT
RD 8	RD8
RD 1	Rd1
2267A	2267 A
101B	101 B
87/91	87-91
1105/1113	1105 to 1113

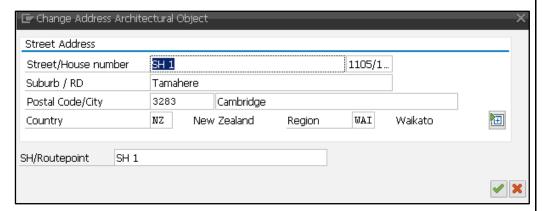|	
Address (searchable)	The address of the property. The key challenge is to identify clearly land that does not have a unique address. For partial acquisitions frequently it will be clearer to input the address of the full (parent) property and use the description field to describe the specific of the land (to be) acquired. To fit with the example description above, the address would be SH 12 and the street number 2334. All Street Names are to be written out in full and not abbreviated, see below;

Should be	NOT
Cambridge Road	Cambridge Rd
Gilchrist Street	Gilchrist St
Oaklea Lane	Oaklea Ln
Ridge Park Drive	Ridge Park Dr
Culmer Place	Culmer Pl

Victoria Avenue	Victoria Ave

State Highway Addresses should be written as below:

Should be	NOT
SH 5	State Highway 5
SH 33	SH33
SH 2	S Hwy 2
SH 29	State Hwy 29

State Highway addresses should also be populated in the SH/Route address entry window of SAP.

Notes field	This field is to capture the current status for acquisition and disposal or management comments. Keeping this updated covers the requirement for the milestone comments that were required in PADS. By inputting new comments at the top of the field, a history can be created. NZTA's requirement is for the status comment to be kept up to date as events occur (at least monthly) for acquisition and disposals. In addition to status, consultants may use this field to set out descriptive information that is not covered in the data fields.
Property Reference Data	
Acq./Disposal Status	The current status of these activities – kept up to date by the acquisition or disposal consultant (drop down box of options)
Full/Partial Purchase	Full (100) - whole property is to be purchased, Partial (101) - part of the property is to be purchased. For the property types other than '01PR Property' use full (drop down box of options).
Property Interest	This is the interest of the land held by NZTA or the party that is being negotiated with. Freehold (10) – a permanent interest Leasehold (11)– a long term or ground lease interest Lease (15) – an occupational or short term lease of a property. This will include licences and other rights to occupy or use. For Easements, Segregation Strips, Temporary Occupation and Road Reserves, use Freehold.
Legacy Number	'A' followed by the acquisition number and 'D' followed by the disposal number.

(searchable)	The legacy OPM management number was a 6 digit number that was incorporated into the SAP AO number in August 2013. This field can be searched on and may be used by external consultants to hold their reference numbers for the property.
CPC File Ref	The LINZ file reference number for the acquisition. If a new file reference is created, say for disposal, add that number.
Management Status	The current status of the property (drop down box of options) This field will be set to 'Not Purchased Yet' by the acquisition manager, and then will be altered to the appropriate option by the external property manager.
Disposal Potential	This box should be ticked if the property is likely (>75%) to comprise land for disposal following completion of the project.

<table>
<tr><td colspan="2" style="background:black"> </td></tr>
<tr><td colspan="2">Status Display</td></tr>
<tr><td>System Status</td><td>This field should generally be left untouched.
It can be used to mark properties for deletion by NZTA. If a property was entered as a mistake, or the property no longer exists this field can be changed via the 'menu' item on the top left hand side. Properties marked for deletion will be cleared and fully deleted annually by NZTA.</td></tr>
<tr><td>User Status</td><td>This field should only be changed by the NZTA Property Manager and indicates:
<u>Investigation</u> – the project has reached a stage where individual properties are identified for investigation, but nothing is being considered for active purchase. Note that dummy properties or entries for multiple properties should not be created in SAP.
<u>Acquisition</u> – consultants are appointed, a land requirement plan is available and funding is approved or likely.
<u>Held</u> – the property interest has been purchased but no property management activity is required. This type was called 'Data Managed' or 'Unmanaged' in OPM.
<u>Managed</u> – the property is being managed by the appointed firm
<u>Disposal</u> – In addition to being held or managed, the property is being scoped for disposal potential or being actively worked on as a disposal.</td></tr>
<tr><td colspan="2">Control</td></tr>
<tr><td>Location
(searchable)</td><td>A selection that matches the NZTA highway regions, selected from a short list (drop down box of options).</td></tr>
<tr><td>Mgmt. Profit Centre</td><td>A location entry number that matches the NZTA-wide regional breakdown for accounting purposes (drop down box of options).</td></tr>
<tr><td>Valid From ... To</td><td>The validity period for the property entry.
Input the 'From' field as the date when that you are entering a new property into the system. This will provide an indication of the first point at which the property became of interest to NZTA.
The 'To' date field is to be left blank and completed when the property is sold or legalised as road and all activity ceases.</td></tr>
<tr><td>Legal Description</td><td>It is mandatory for these fields to be completed so to enable all users to clearly identify the property.</td></tr>
</table>

	As these entries are not intended to provide an exhaustive summary of the legality, particularly long title entries can be put in the notes field.
	Copy and paste the information from reliable sources to eliminate typing errors.
Current Title	Used to indicate that the description line is still current and relevant to the property (tick or not).
Parcel ID	The LINZ unique parcel identifier is obtained by referencing the parcel details in a land/title system.
	This will be the most important field for NZTA as it will be used to link with the proposed NZTA GIS system in late 2014. **This must be found and populated for all property by the time it is acquired**.
Roll No.	The valuation roll number, referred to on Rates Invoices. To be input with minimum additional punctuation, e.g. 23411-09064.
Title Reference	The title reference (Identifier) e.g. WN23/456. Limited space is available in this field so Gazette Notices and other data can either be added to the Appellation or copied into the Notes section. Use 'GN' for gazette notice.
Appellation	The legal description. In order to minimise keying error, this field should be populated by copying the information directly from a land information system such as Quickmap. This field can hold up to 200 characters. Information beyond that limit should be held elsewhere, noting that these fields are to enable searching and are not intended to be a legal resource.

Additional Data

Field Name	Description
Maintenance Planning	
Initiative	The highway improvement project that the land is being purchased or held for. 'Initiative' is the SAP name for a project. This field is completed by finding and selecting the Initiative following advice from the NZTA property manager or project manager. By completing this field the forecast construction date will be displayed in the next field. This information is useful in prioritising purchase activity and the management of the property.
Maintenance Level	The standard agreed by the NZTA property manager and property management consultant (drop down box of options) This can be left blank in the acquisition stage.
Building condition	An indication of the condition observed by the property management consultant on the annual inspection or purchase of the property. (drop down box of options). Leave blank in acquisition.
Valuation Information	
Main usage type	The use of the property, selected from choices set by contract conditions

	(drop down box of options).
Rural Use	The rural activity on the land being purchased or managed. Only complete this field for property with main usage – rural or lifestyle block.
Heritage Status	To be input as option '0' unless the property is classified. The other choices are '1' - pre 1900 buildings & older, '2' -Scheduled if the property is on a local authority or other schedule '3' - NZPHT registered.
Floors	The number of floors of the building on site. 1 = a single level building, 2 = a ground floor and one upper level & etc.
Impr. Built Date	The approximate year or years the main building on site was constructed.
Dates	(Note that these dates are actual dates and not forecast dates)
Vac. For Constr	The date that the property was vacated (of tenants) to be available for the project construction team.
Declared Surplus	The date that the NZTA highway manager signed the declaration that the property was surplus to NZTA.
Date Sold	The date that the property was sold.

Partners

Field Name	Description
Partners (searchable)	Partners are the NZTA people and suppliers that are involved in the property. The current owner must be recorded as a business partner for an acquisition. The purchaser should be recorded as the new owner for a disposal. When the property is purchased, the owner should be changed to NZ Transport Agency, Victoria Arcade, 50 Victoria Street. The Business Partner number for NZTA is: 101008016. The former owner details are adjusted by inputting the End Relationship date as the purchase date. Where the business partner is a couple e.g. Jim & Mary Evans Last name = Evans First name = Jim & Mary A couple with different names e.g. Jim Evans & Mary Smith Last name = Evans & Smith First name = Jim & Mary Where a Trust is recorded as the registered proprietor of a property, use the owners name for residential situations. For a commercial property, create the Trust as an organisation.
Dates	SAP takes note of the dates for the Partners. **The first owner recorded must have the same 'Start reltnship' date as the 'Validity From' date of the property as shown on the General tab.** When the property changes hands, the first owner end date is completed and a new owner started **on the same day**.

It is possible to have more than one current partner of any type. If partners change, perhaps due to change of personnel, the expectation is that an outgoing partner will have a new end date and the incoming partner will start on that date.

Field Name	Description
Required Land Area	The area required from this property for road as set out in the land requirement plan. This excludes severance areas that NZTA may have to acquire as well. This field can be left at 0.
Total Ground Area	The total land holding of the owner affected by the negotiations. When the land is purchased, this field should be changed to document the area that NZTA purchased. This could include severance areas in addition to the required land area.
Valuations	The land value and improvements value are input separately and SAP adds these together to display a total area.
Purchase Land and Buildings	The sum paid for the value of the property being purchased. Note this is not intended to be a forecast field. It should be left blank until the property is purchased and will be completed by the acquisition consultant.
Purchase – Compensation	The amount paid to the owner for all other forms of compensation. This will include the reimbursement of the owner's costs, injurious affection of other land held, solatium or other land loss payments. Note this is not intended to be a forecast field. It should be left blank until the cost is incurred and will need to be updated if additional payments are made.

Field Name	Description
PS Assignment	The Work Breakdown Structure Element (WBSe) that the property object is assigned to for forecasting cash flows against and ensuring that costs or revenues are accounted for correctly. Three numbers are created for each new property; '87' = the acquisition WBSe '88' = management '89' = disposal costs and revenue. When created these WBSe numbers can all be used for forecasting, but cannot be used to charge costs against. To use the WBSe for charging costs to, the NZTA property or project manager must take action to change the status of the WBSe and link the WBSe to the project the land is being purchased for. Note that a property may be in the investigation phase and not be active for acquisition. In this early stage, any costs must be allocated to the project WBSe which will be provided by the project manager.
Real Estate for Parcel	Property objects can be assigned to other objects. This must be completed where one property is created from another or amalgamated with another on

legalisation. This should be used to link freehold and leasehold interests where they are being acquired separately. The relationship valid from date would be either the date the information is being input or a key date such as the title issuance date.	

Field Name	Description
	This section replaces the milestones that were in the legacy systems. On commencement of an active acquisition the milestones that are most likely to be required should be created and dates estimated for their completion. At a minimum, a standard acquisition should include: • Initial Owner Contact • Agreement Reached • Settlement/Transferred to Management The forecast dates should be maintained at least monthly in order to provide current information to project managers and property managers on progress and forecasts. On settlement, the acquisition manager should estimate the time when the survey and legalisation activities will probably take place and create the milestones. Cash forecasting takes place in a separate module and those forecasts should reconcile with the milestone forecast dates. Note that there is no requirement for inputting Disposal milestones or milestone comments. This is due to the current (August 2013) use of Microsoft Project as the principal Disposal reporting and management tool. As data should only be stored in one place, there will be no need to store milestone information in SAP.
	Milestones can be marked complete and dates can be changed as they progress.
	Comments can be added to each Milestone in the Memo field on the lower part of the screen. Input of these is optional, because the Notes field on the General tab should be used for brief status comments.

Overviews

Field Name	Description
	This tab is used to display information that appears elsewhere such as tenancy details, documents, measurements of buildings and land etc.
Contract	By clicking on the arrow-down icon, Contract can be selected. If a tenancy exists, the contract number and name will be displayed. Double clicking the contract number will open the contract to see all of the details.