

WORX4U ARCHIBUS IMPLEMENTATION:

LEASE-IN: LEASE SUSPENSION VERIFICATION

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WORX4U



DOCUMENT CONTROL SHEET

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CLIENT DISTRIBUTION AND COMMUNICATION

Name	Organisation	Date of Issue (DD/MM/YYYY)
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	NDPW	
	NDPW	
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1. INTRODUCTION

This user guide provides details about how to verify a lease suspension transaction.

2. SCOPE

2.1 PURPOSE

This training manual is intended for the National Department of Public Works: Property Management Trading Entity (PMTE).

The purpose of this document is to provide details about how to:

- Verify Lease Suspension.

The Lease verification view displays all the leases transaction that are currently pending verification. The verifier will be able to assess the lease details captured with the matching mandatory document. Once a full assessment has been undertaken to ensure that all the mandatory information has been captured the verifier will either route for approval the lease transaction or send it for review with comments to the capturer on the information that is outstanding or any corrections that need to be carried out.

2.2 APPLICABILITY

This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision. The document is applicable to:

- Web Central v21.3

3. CONNECT TO ARCHIBUS

Using the Web Central application is the easiest way to access ARCHIBUS.

To access the data, only a web browser (Internet Explorer, Google Chrome or Mozilla Firefox) and a URL (Internet address) is required

1. URL: e.g. <https://worx4uarch-uat.pmte.org.za/archibus/login.axvw>- this URL is for exercise purposes

Note: The browser cache (history) must be deleted to view the updated ARCHIBUS functions.

2. Enter your username and password.

Figure 1: Sign in Window

Once all login information has been typed,

3. Click **Sign In**.

Figure 2: Sign - In

4. The following screen – landing page – will be displayed:

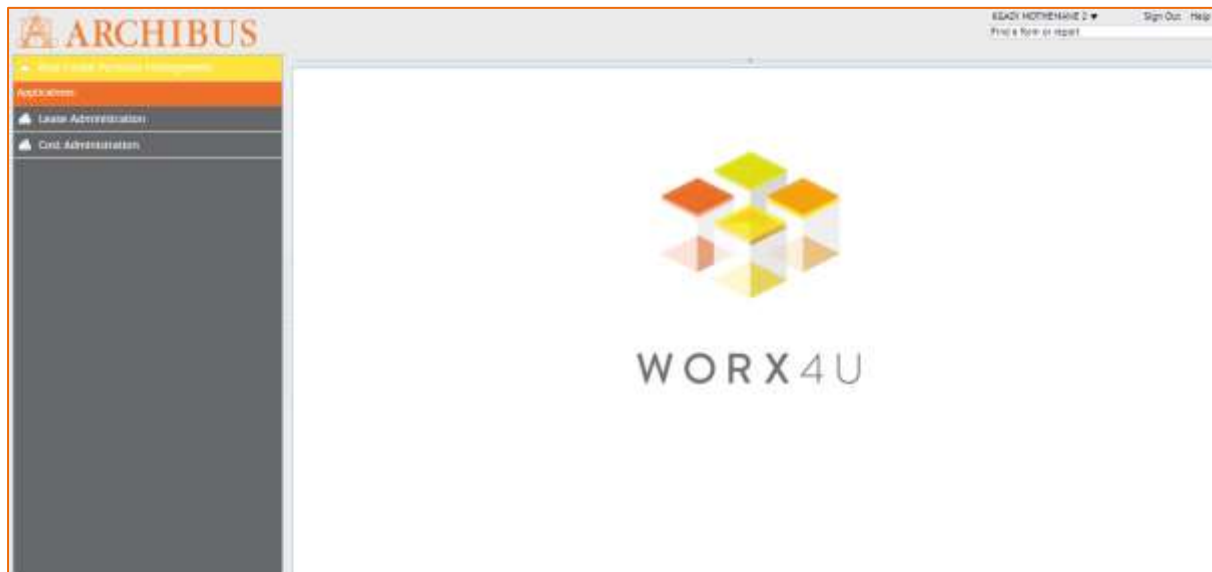


Figure 3: Landing Page

General Rules:

- This function can only be performed by the Verifier.
- The Verifier cannot edit the lease transaction information.
- He/she can only view the lease transaction details and the attached documents.

4. VERIFY LEASE

To access the Lease Verification,

1. Select **Lease Administration | Verify Lease | Lease Verification**

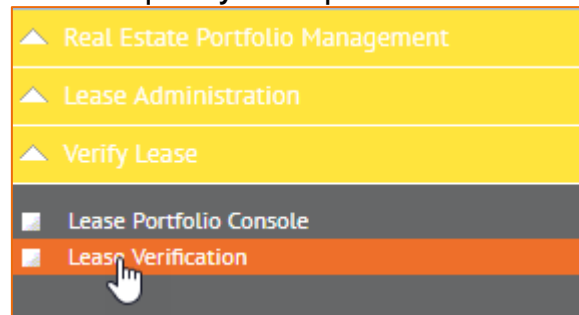


Figure 4: Process Navigator

2. The user selects the Lease transaction by clicking on the lease code to open the general lease information to be verified

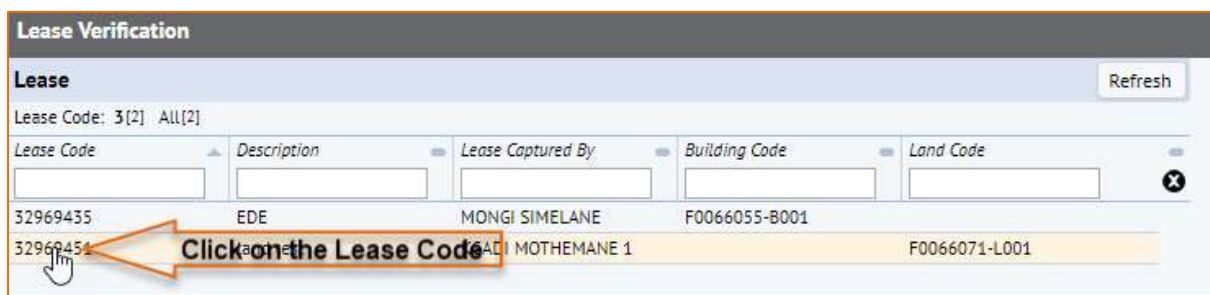


Figure 5: Leases

3. Once the information has been verified the lease will have to be routed for Approval.



Figure 6: Route for Approval

- The system will require confirmation to proceed with routing the lease for Approval. Confirm by clicking on **Yes**

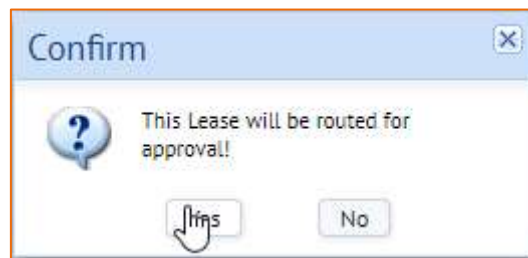


Figure 7: Confirm Route for Approval

- Confirmation that transaction has been sent for approval

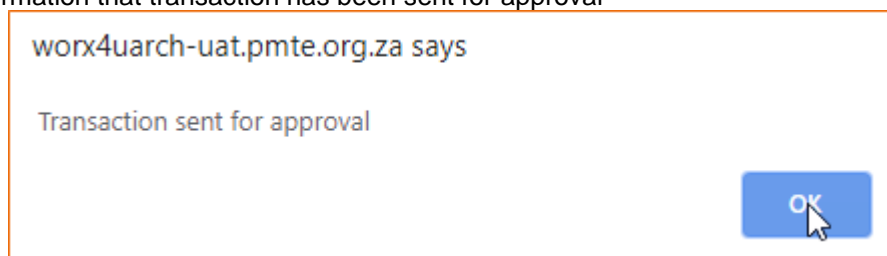


Figure 8: Approval Confirmation

- Once the user has confirmed the transaction, the status of the Lease will change to Send for Approval



Figure 9: General Lease Information – Lease Status

7. If the data captured is incorrect and the transaction needs to be redone the transaction can be rejected. Before rejecting the transaction ensure that sufficient understandable comments are added for the capturer in the open **Comment** field. Once the comment is completed, click **Reject**.

The screenshot shows the 'Lease Verification' form. The 'Verification Comments' field contains the text 'Incorrect data captured'. The 'Reject' button is highlighted with a red arrow and a red box. Other buttons include 'Send for Review' and 'Send for Approval'.

Figure 10: Reject Option

8. The system will require confirmation to proceed for lease to be rejected. Confirm by clicking on **Yes**

The screenshot shows a 'Confirm' dialog box with the text 'This Lease will be rejected!'. The 'Yes' button is highlighted with a mouse cursor, and the 'No' button is also visible.

Figure 11: Rejected Confirmation

9. If the information is reviewed and the verifier is not satisfied with the data captured and needs the information to be corrected, the asset transaction can be sent for review. Before sending the transaction for review ensure that sufficient understandable comments are added for the capturer in the open **Action Comment** field. Once the comment is completed click **Send for Review**.

The screenshot shows the 'Lease Verification' form. The 'Verification Comments' field contains the text 'Incorrect document uploaded'. The 'Send for Review' button is highlighted with a red arrow and a red box. Other buttons include 'Reject' and 'Send for Approval'.

Figure 12: Send for Review Option

10. The system will require confirmation to proceed for lease to be routed for review. Confirm by clicking on **Yes**

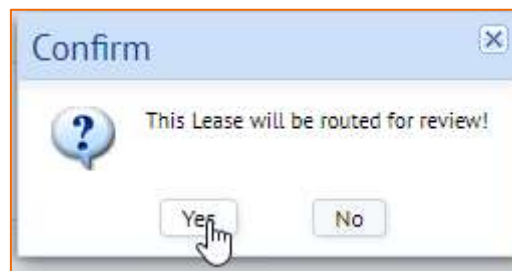


Figure 13: Routed for Review Confirmation

Note: *Reject – If a lease transaction is rejected, the transaction status is updated to REJECTED and is removed from all views. It is not deleted from the system; it will be archived.*

Send for Review – lease transaction is missing some information and will be sent back to the capturer to fix.

You have now reached the end of the manual and the lease will be awaiting approval.

THE END!