WORX4U ARCHIBUS IMPLEMENTATION:

LEASE-IN: LEASED ASSET MANAGEMENT, VERIFICATION AND APPROVAL

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CONTENTS

1. INTRODUCTION

The ARCHIBUS Leased Asset Management role provides tools for maintaining an accurate inventory of leased assets: land and improvements. This view also displays all leased assets that have been approved to date.

You can update the inventory data by directly editing the information from the Assets List.

2. SCOPE

2.1 PURPOSE

This training manual is intended for the National Department of Public Works: Property Management Trading Entity (PMTE).
This User Guide provides details about How to:

- Manage Leased Assets

The Manage Leased Asset view displays the Leased Asset Register for assets that are leased & have been approved to date. Users will be able to review & update the asset details, documents, contacts & route transactions for verification & approval.

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This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision.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**.
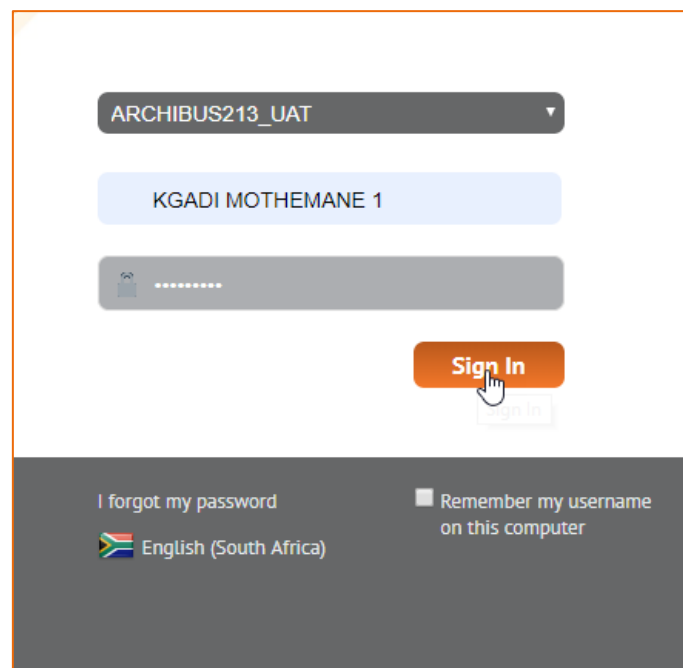
Figure 2: Sign-In

4.The following screen – landing page – will be displayed:
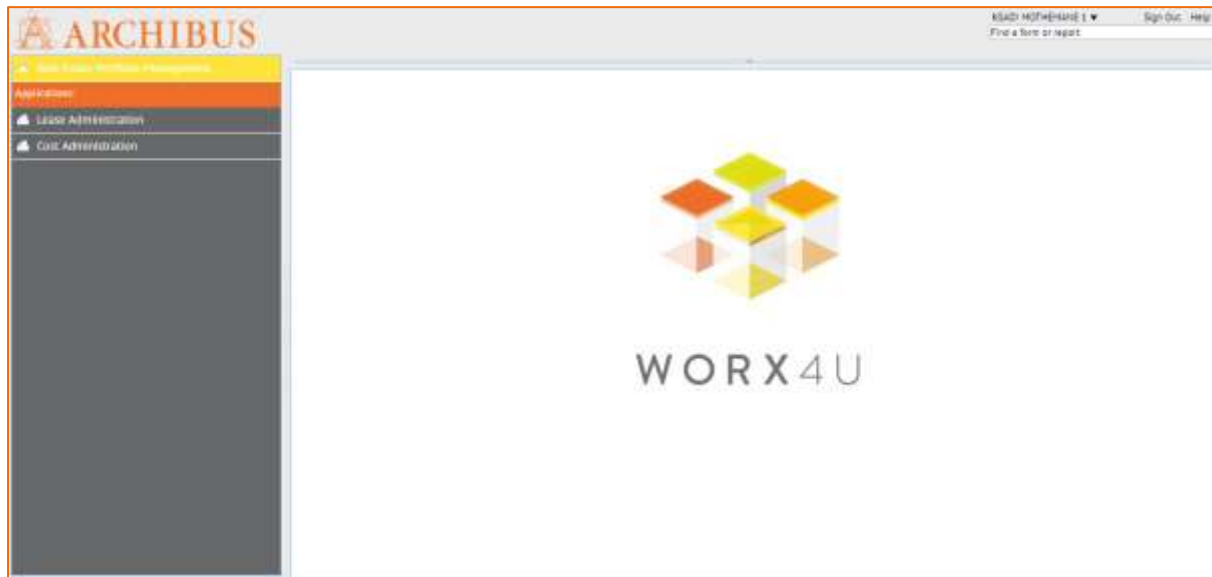
Figure 3: Landing Page

General rules:

- This function can only be performed by the capturer.
- Fields marked with a * are mandatory field.
- Once the transaction has been sent for verification no detail of the asset can be edited.
- No new asset transaction can be loaded against an asset that has a transaction in progress.
- The system might also prompt for additional information to be added if there are mandatory fields missing information. This will mostly be due to the leased asset data that was migrated into ARCHIBUS and some assets already had missing mandatory information.
- User will need to upload a mandatory document to support the updates made to an asset transaction.

4. MANAGE LEASED ASSETS

To access the task: **Manage Leased Assets**,

1. Select **Real Estate Portfolio Management | Lease Administration | Leased Asset Management| Manage Leased Asset**

Figure 4: Process Navigator

2. The system will show the **Manage Leased Assets** view which keeps records of all **Leased Assets**.

Figure 5: Manage Leased Assets

3. Click the **Manage** button next to the asset for which you would like to view or update the asset details.

Figure 6: Asset List

4.The Asset Detail view will display.

Note: *From this view the user is be able to update & view the following existing asset information:*

  ➢ *Identification*
  ➢ *Location*
  ➢ *Size*
  ➢ *Description*
  ➢ *Ownership*
  ➢ *Rates and Valuations*
  ➢ *Contacts*
  ➢ *Documents*

In addition to this, a user can add new transactions against the selected asset as illustrated in **Figure:20**
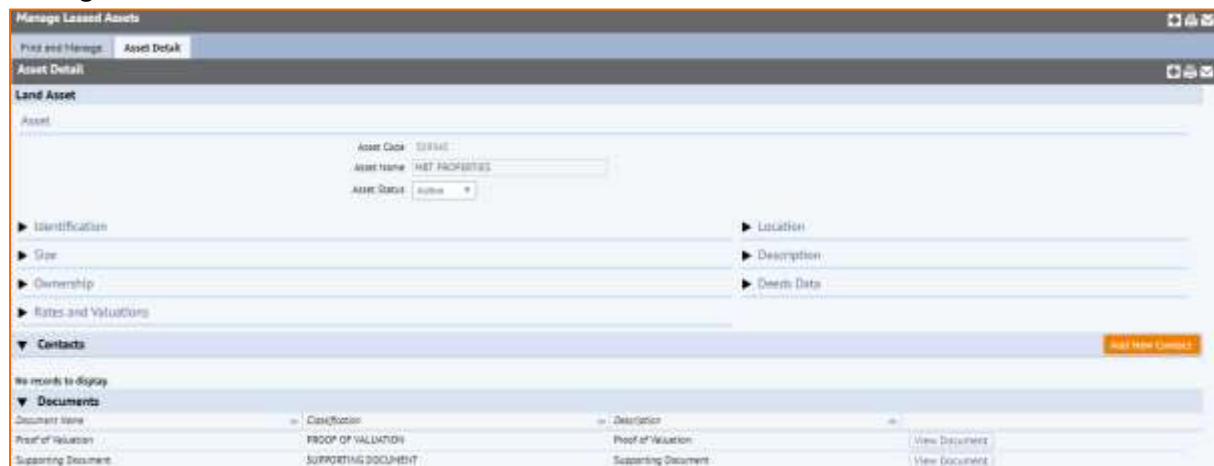

Figure 7: Asset Details

5. The Change history section shows an audit trail of the users that worked on the transaction.

Figure 8: Asset Detail

6. To view the information from the different panels, click on the black arrow next to what you want to view as showed below.

Figure 9: Black Arrow

Figure 10: Information

7. To add contacts relevant to the asset click **Add New Contact**

Figure 11: Add New Contact

8. The **Contacts** screen will display for the user to enter information the information of the contact. Once the information has been captured, click **Save.**
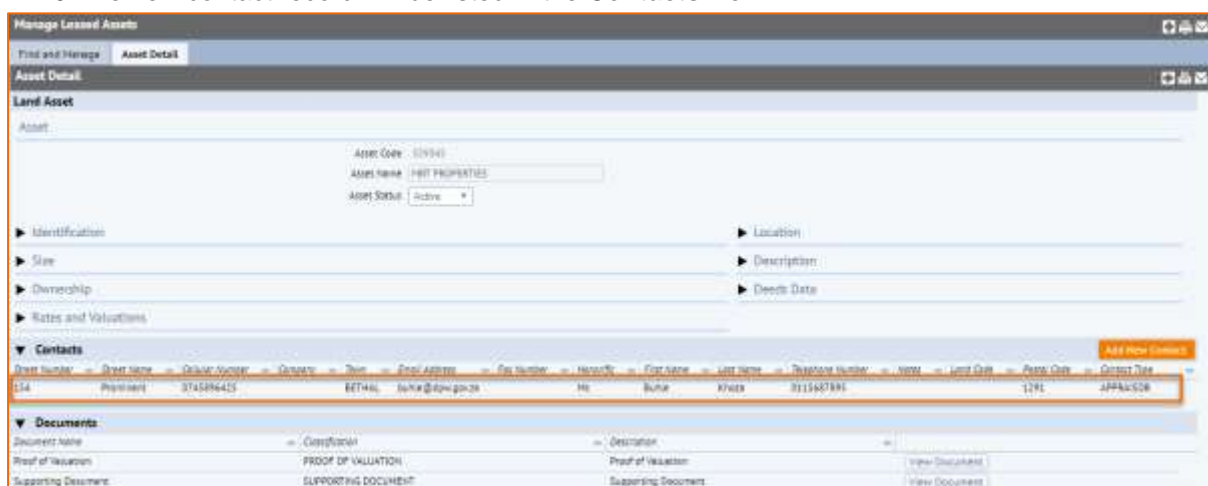
Figure 12: Contacts – Save

9. The new contact record will be listed in the **Contacts** view.

Figure 13: Contacts

10. The details an existing contact record can either be updated or removed from the asset by deleting it. To update information of a contact, select the relevant contact record.

Figure 14: Contacts

11. The **Contacts** view will be displayed. To update any of the information amend the details within the relevant field and then click **Save**.

Figure 15: Contacts - Save

12. To delete the contact record, select the relevant contact record.

Figure 16: Contacts

13. The **Contacts** view will be displayed. To delete the contact, click **Delete**.

Figure 17: Contacts - Delete

14. The system will request confirmation to proceed with deleting the contact. Click **OK**.

worx4uarch-uat.pmte.org.za says

Record [329345-0] will be deleted.

OK   Cancel
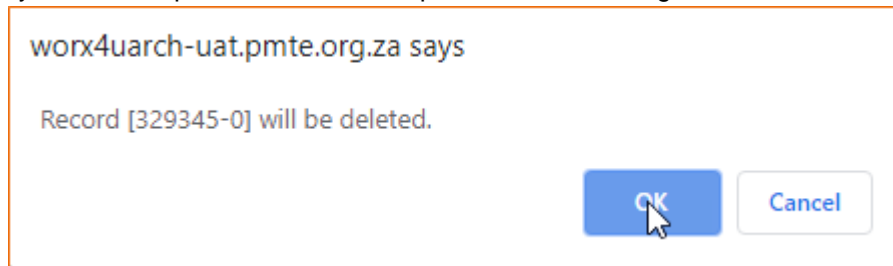
Figure 18: Delete Confirmation

15. The contact record will be removed from the asset.

▼ **Contacts**   Add New Contact
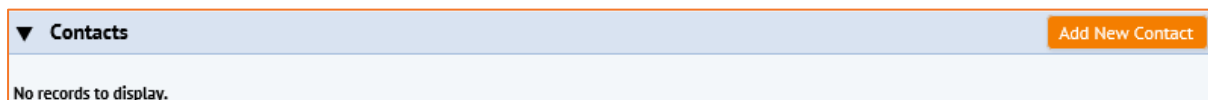
No records to display.

Figure 19: Contacts

16. For asset data changes, click **Add New Transaction**.
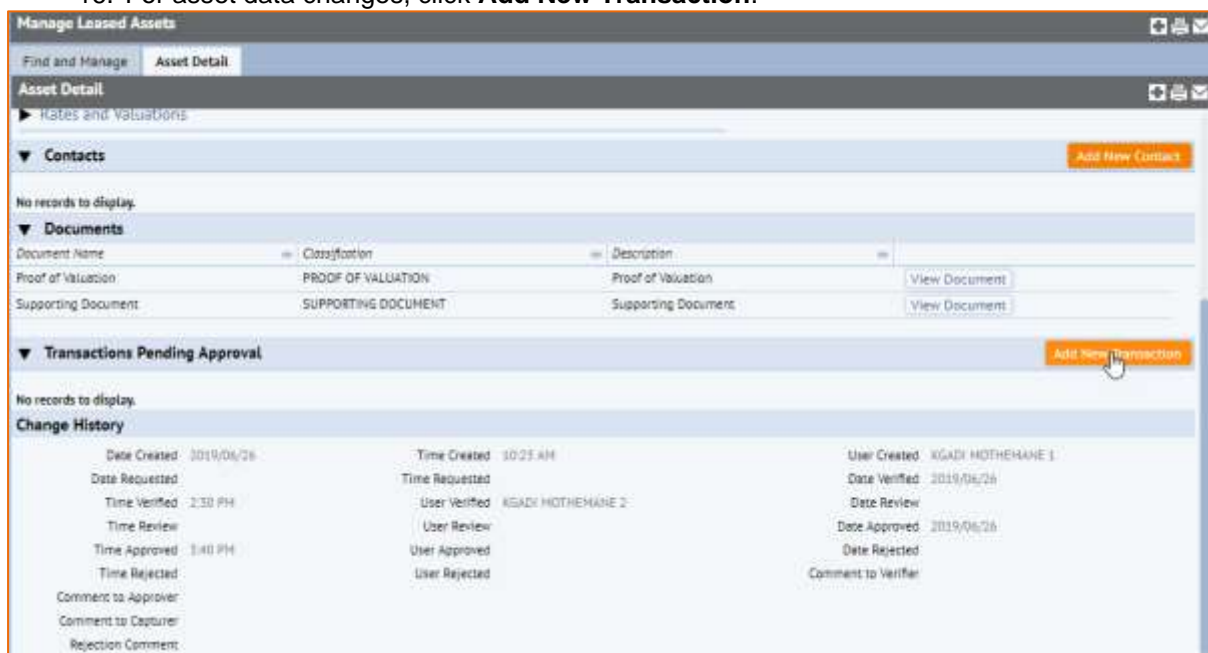
Figure 20: Add New Transaction

17. The **Add a New Transaction for Asset** view will open.

Figure 21: Add a New Transaction for Asset

18. The **Add New Transaction for Asset** view is divided into 2 panels. The top panel, **Transaction General Information**, which displays the following information:
    o *Date of Transaction: the date when the transaction is/was created*
    o *Time of Transaction: this is the time stamp of when the transaction was initiated*
    o *Status: the current default status of the transaction- Saved*
    o *Requestor Username: the user that is responsible for this transaction*
    o *Comment field: this field is used to add detail of the information that is being updated/changed*

Figure 22: Asset Data Change

19. The bottom panel is the **Transaction Details** form. Within the **Transaction Details** view the **Updated Value** form on the left side of the frame is editable to allow the user to update the asset details. The **Existing Value** form on the right side of the frame is non editable and serves to display the details already captured for the asset.

Figure 23: Transaction General Information

20. To proceed, update the relevant information under the Updated Value form. Once all the correct information has been captured, click **Save**.

Figure 24: Asset Data Change

21. Once the information has been saved the **Add New Document** button will display. This will prompt the user to upload the mandatory document for the change/update executed against the asset. To upload the document, click on **Add New Document**.

Figure 25: Add New Document

22. The Add New Document view will display. Complete the document information then click **Save**.

Figure 26: Add New Document - Save

23. The **Check in New Document** icon will display, which will allow the user to upload the relevant document. Click on the **Check in New Document** icon**.**

Figure 27: Check in New Document

24. The Check in New Document view will display. Click **Choose file**.
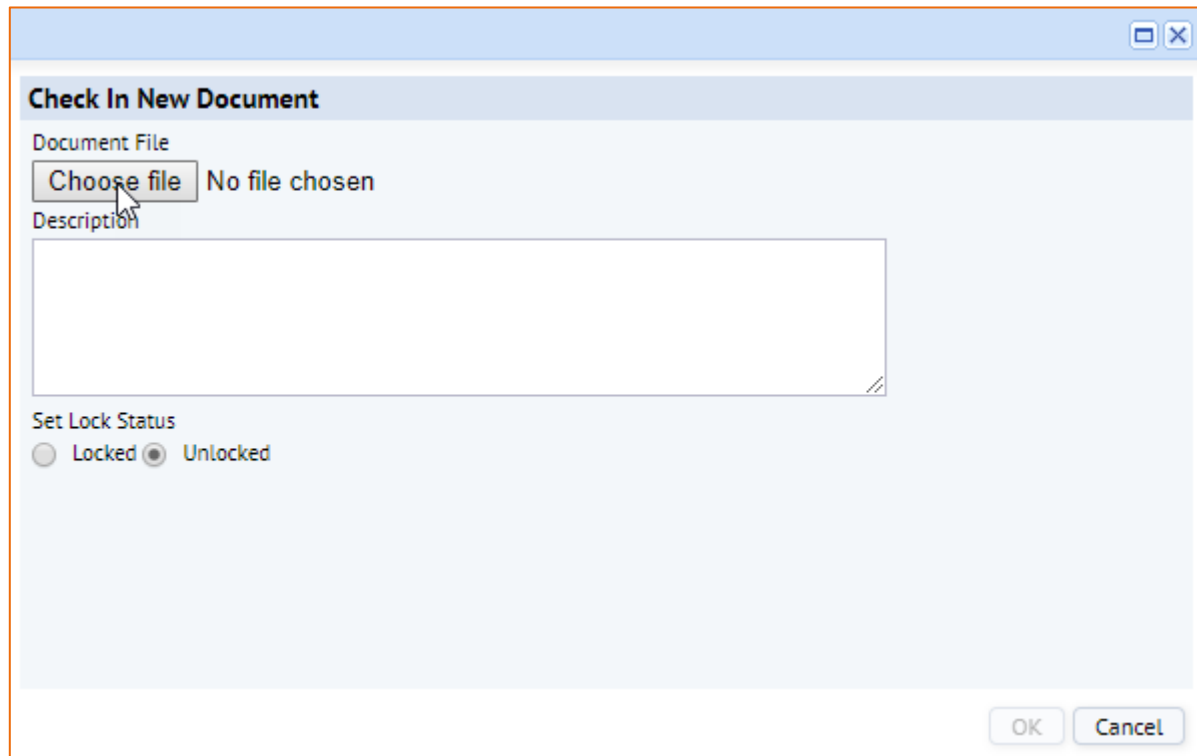
Figure 28: Choose File

25. The system will prompt the user to check in the document by browsing through the existing files.
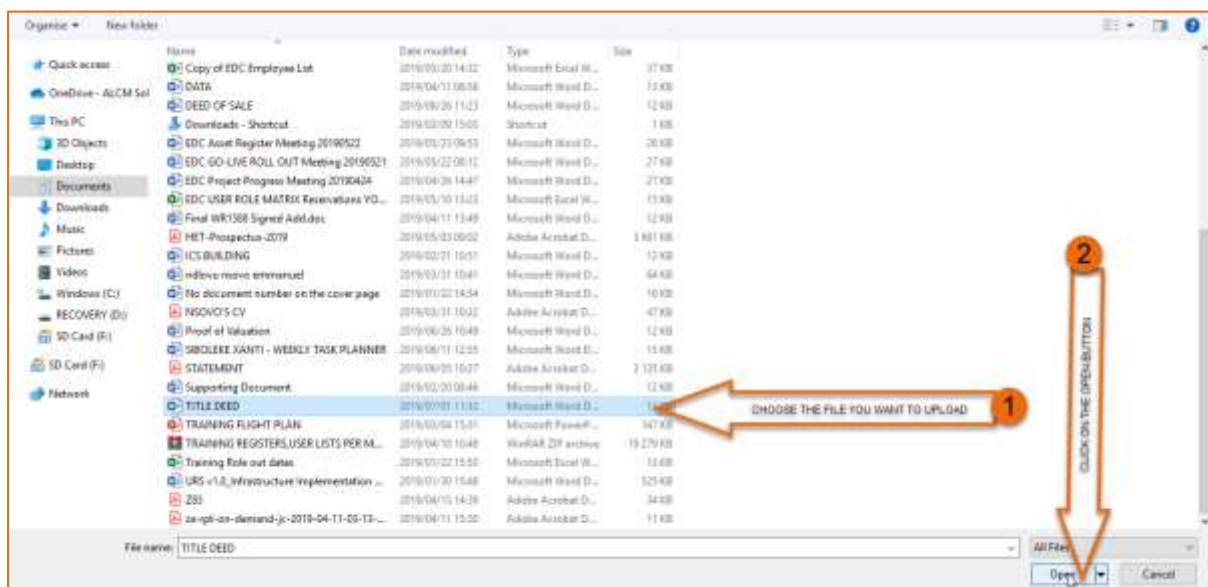
Figure 29: Upload File

26. Once the file has been selected, click **OK**.
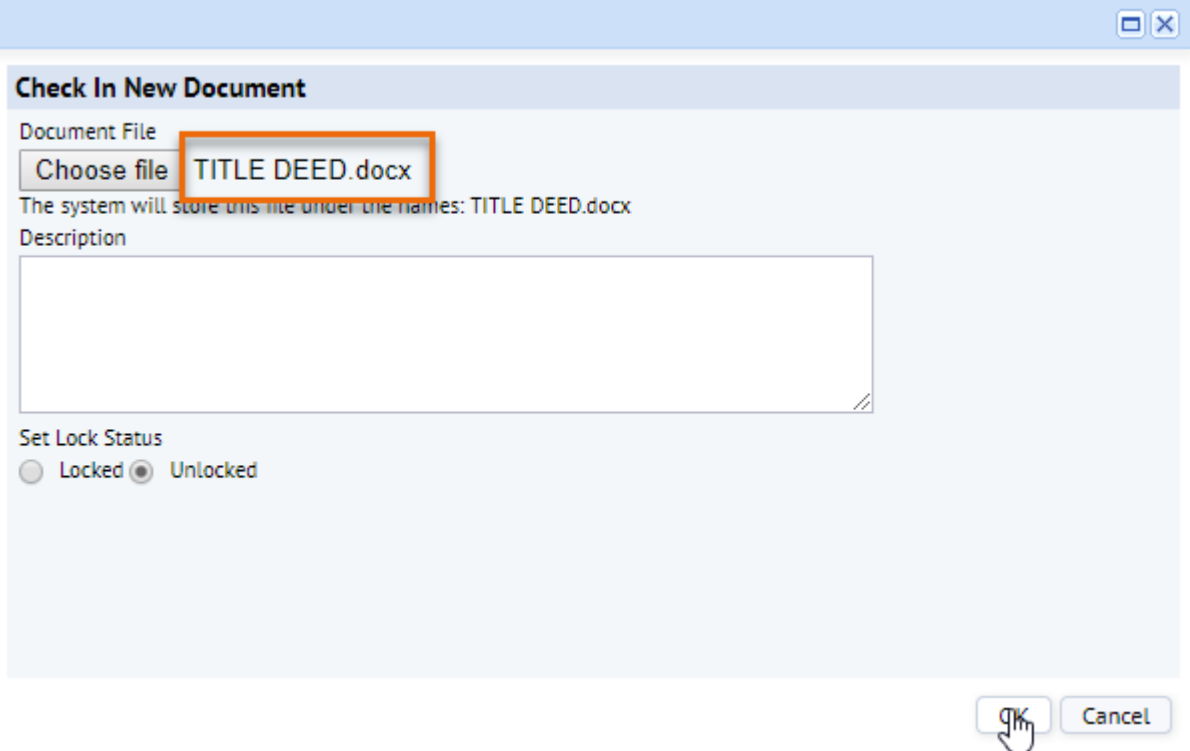
Figure 30: Check in New Document - Document File

27. When the document has been uploaded the user can click **Save**.
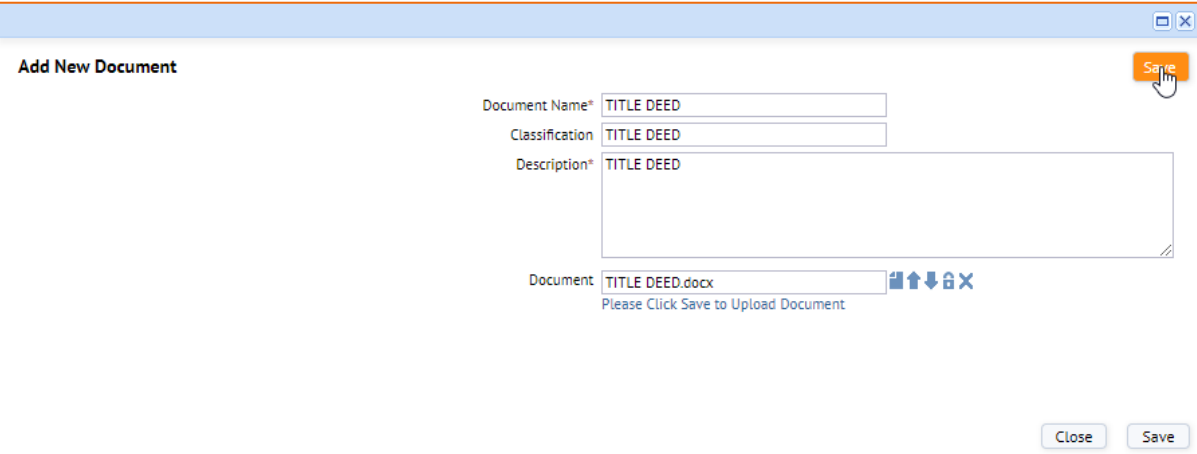
Figure 31: Add New Document - Save

28. The new document record will reflect under the **Transaction Documents** view.

Figure 32: Transaction Documents

29. With the new details saved and the mandatory document uploaded the transaction can be sent for verification. To send the transaction for verification click **Save and Send for Verification**.
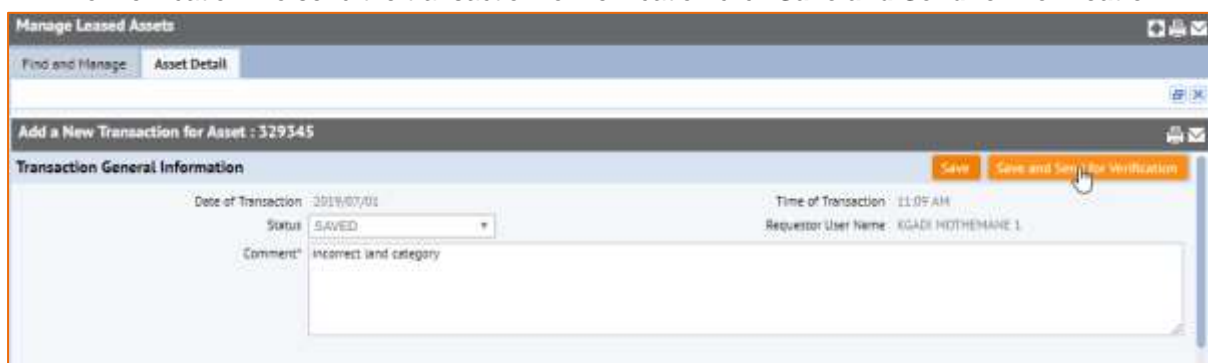
Figure 33: Transaction General Information - Save and Send for Verification

30. The system will request confirmation that the transaction should be routed for verification. Confirm by clicking **OK**.
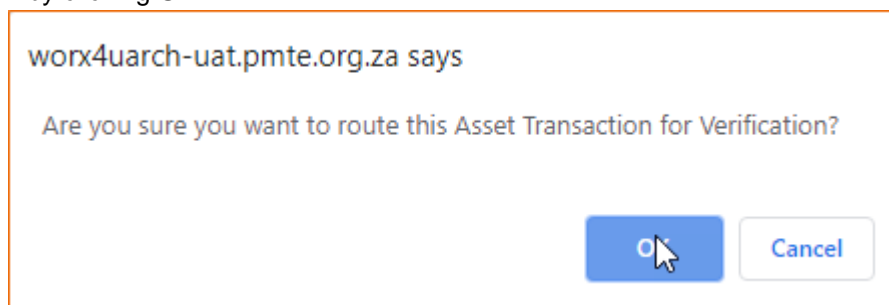
Figure 34: Confirmation to Send for Verification

31. The transaction will be listed under the **Transactions Pending Approval** view on a **Sent for Verification** status.

Figure 35: Transaction Status: Sent for Verification

You have now reached the end of the manual for leased asset management and the asset transaction will be awaiting verification.

THE END!

5. VERIFY LEASED ASSETS

To access the task, **Verify Leased Asset**,

1. Select **Real Estate Portfolio Management | Lease Administration | Leased Asset Verification | Verify Leased Assets.**
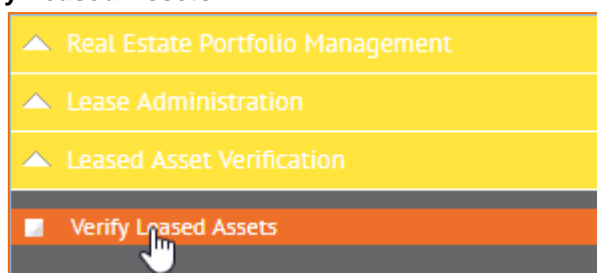
Figure 36: Process Navigator

2. The **Verify Asset Transactions** view will be displayed. Click on **Details** to view the transaction.

Figure 37: Transactions Pending Verification

3. The Transaction General Information view will display, and the user will be able to review the data captured for the transaction. Refer to the comments in the Comments field and the attached document. Also refer to the information highlighted in burgundy to see which data has been updated for the asset being reviewed. When the user verifying the transaction has reviewed the information and is satisfied that all the necessary information has been captured, click **Send for Approval**

**Figure 38: Transaction General Information - Send for Approval**

4. The system will prompt the verifier to confirm that the transaction should be sent for approval. Click **Yes**.
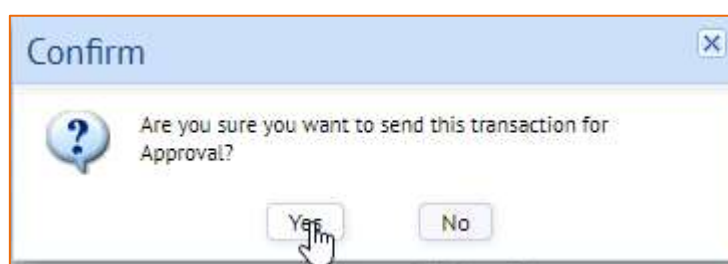
Figure 39: Send for Approval Confirmation

5. If the information is reviewed and the verifier is not satisfied with the data captured and needs the information to be corrected, the transaction can be sent for review. First add an action comment in the action comment field, Click **Send for Review** then confirm by clicking **Yes.**

Figure 40: Send for Review

6. When the verifier attempts to send the transaction for review without adding the relevant comments in the **Comment** block the system will prompt that a comment be added. When this message is displayed click **OK** and revert to the Transaction General Information view to add a comment in the **Action Comment** field. See figure 38.
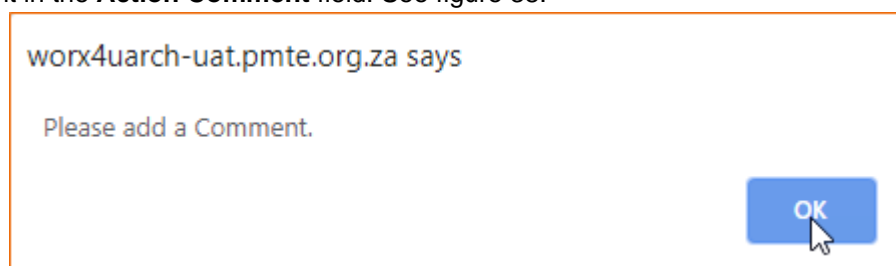
Figure 41: Add A Comment

7. If the data captured is incorrect and the transaction needs to be redone. First add an action comment in the action comment field, Click **Reject** then confirm by clicking **Yes.**

Figure 42: Reject

8. When the verifier attempts to reject the transaction without adding the relevant comments in the **Comment** block the system will prompt that a comment be added. When this message is displayed click **OK** and revert to the Transaction General Information view to add a comment in the **Action Comment** field. See figure 40
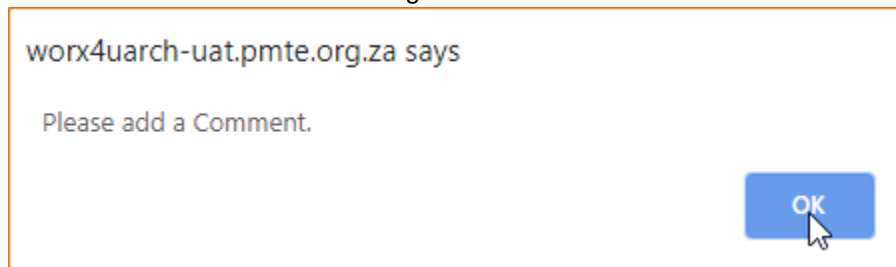
Figure 43: Add A Comment

Note: Once a transaction has been rejected, the user that captured the transaction will receive notification of this, along with the comments entered justifying the decision to reject the transaction. The transaction will then be archived.

You have now reached the end of the manual for leased asset management verification and the asset transaction will be awaiting approval.

THE END!

6. APPROVE LEASED ASSETS

To access the task, **Approve Leased Assets**,

1. Select **Real Estate Portfolio Management** | **Lease Administration** | **Leased Asset Approval** | **Approve Leased Assets.**
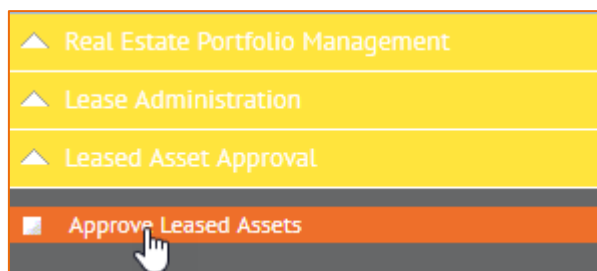

Figure 44: Process Navigator

2. The **Approve Asset Transactions** view will be displayed. Click on **Details** to view the transaction.
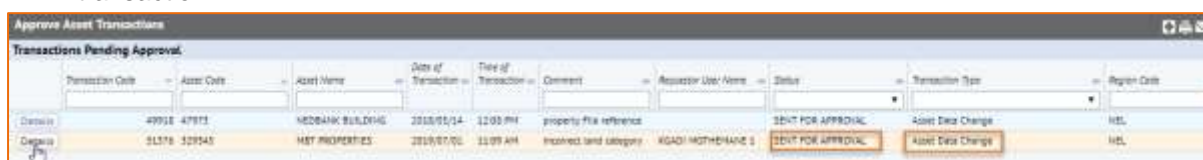
Figure 45: Transactions Pending Approval

3. The Transaction General Information view will be displayed, and the approver will be able to review the data captured for the transaction.
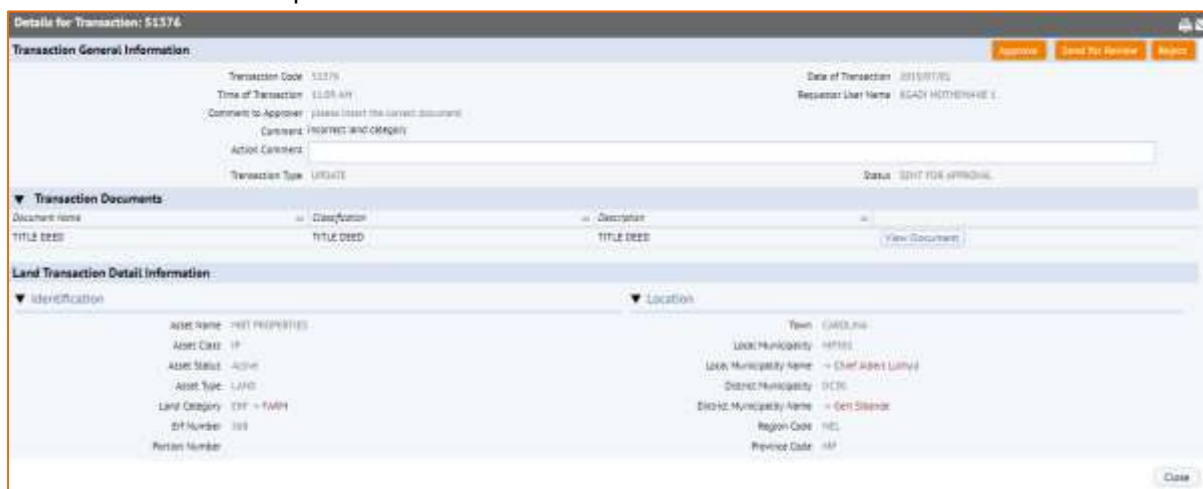
Figure 46: Transaction General Information

4. When the approver has reviewed the information and is satisfied that all the necessary information has been captured, click **Approve**.

Figure 47: Transaction General Information – Approve

5. The system will prompt the approver to confirm that the transaction should be approved. Click **Yes**.

Figure 48: Approval Confirmation

Figure 49: Asset Update Confirmation

6. If the information is reviewed and the approver is not satisfied with the data captured and needs the information to be corrected, the transaction can be sent for review. Click **Send for Review.**

Figure 50: Send for Review

7. When the approver attempts to send the transaction for review without adding the relevant comments in the **Comment** block the system will prompt that a comment be added. When this message is displayed click **OK** and revert to the Transaction General Information view.

Figure 51: Add Comment

8. Once the relevant comment has been added as to what needs to be fixed or reviewed, click **Send for Review**.

Figure 52: Send for Review

9. If the data captured is incorrect and the transaction needs to be redone, click **Reject**.

Figure 53: Reject

10. The system will prompt the approver to confirm the transaction rejection. Click **Yes.**
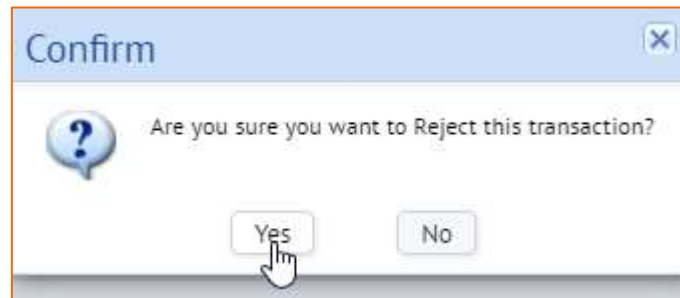

Figure 54: Rejection Confirmation

Figure 55: Reject

Note: *Reject – If an asset transaction is rejected, the asset transaction status is updated to REJECTED and is removed from all views. It is not deleted from the system; it will reside on the ls Table.*
Send for Review – Transaction is missing some information and will be sent back to the capturer to fix. The Verifier/Approver cannot edit the transaction information.

You have now reached the end of the manual for leased asset management approval and the asset number will be Updated as seen at Figure 49 above.

THE END!