WORX4U ARCHIBUS IMPLEMENTATION:

LEASE-IN: APPROVE LEASE

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CONTENTS

1. INTRODUCTION

This user guide provides details about how to approve a lease.

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:

- Approve a Lease transaction.

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This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision.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,
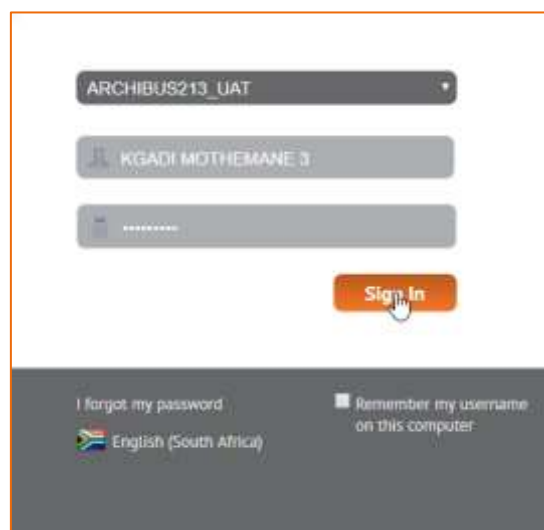
3. Click **Sign In**

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 Approver.
- The Approver cannot edit the lease transaction information.
- He/she can only view the lease transaction details and the attached documents.

4. APPROVE LEASE

To access the **Lease Approval** task,

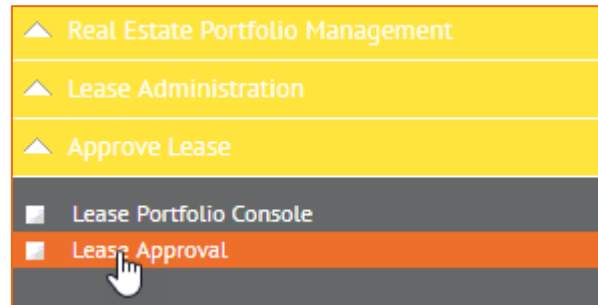1. Select **Real Estate Portfolio Management | Lease Administration | Approve Lease | Lease Approval**

Figure 4: Process Navigator

2. The system will display the Lease Approval view with a list of lease transactions awaiting approval. Selects the Lease Code to open the general lease information to be **approved**.
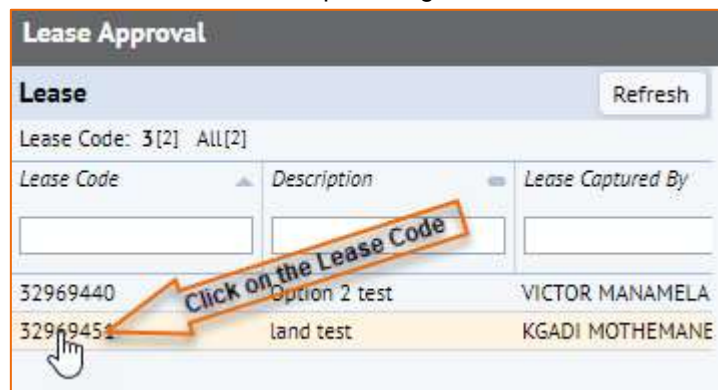

Figure 5: Lease List

3. Once the information has been verified the lease transaction will have to be **approved**.

Figure 6: General Lease Information

4. The system will require confirmation to proceed with approving the transaction. Confirm by clicking on **Yes**
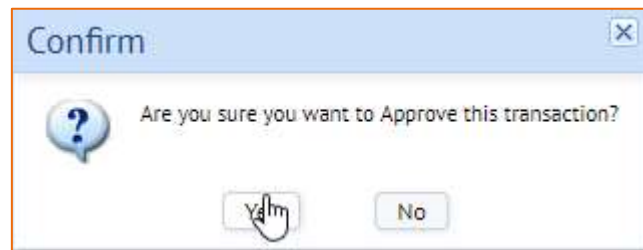

Figure 7: Approval Confirmation

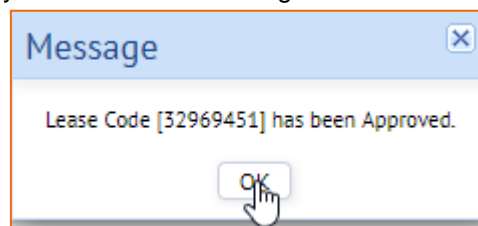5. The system will display a confirmation message that the transaction has been **Approved**.

Figure 8: Lease Code Approved

6. Once the user has confirmed the transaction, the status of the Lease will change to **Active.**

Figure 9: General Lease Information – Lease Status

Figure 10: Allocation Information

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

Figure 11: Reject Option

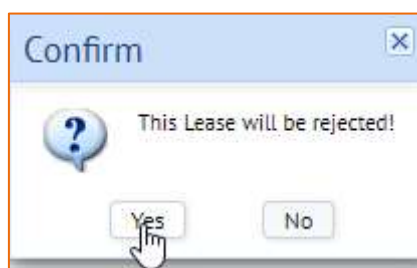8. The system will require confirmation to proceed with rejecting the transaction. Confirm by clicking on **Yes**


Figure 12: Reject Option

Note: *Once the lease transaction has been rejected, it is archived on the Rejected Asset Transaction View Console*

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

Figure 13: Send for Review Option

10. The system will require confirmation to proceed for lease route for review of the transaction. Confirm by clicking on **Yes**
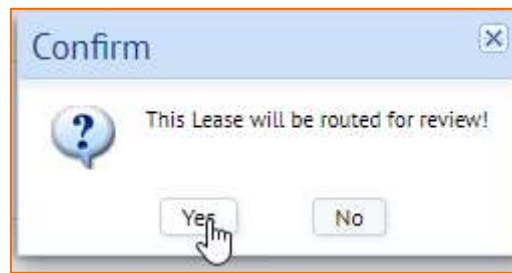
Figure 14: Route for Review Confirmation

Note: *Reject – If a 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 transaction will be approved.

THE END!