WORX4U ARCHIBUS IMPLEMENTATION:

LEASE-IN: VERIFY LEASE

public works

Department:
Public Works
REPUBLIC OF SOUTH AFRICA

WORX4U

DOCUMENT CONTROL SHEET

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CONTENTS

1. INTRODUCTION

This user guide provides details about how to verify 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:

- Verify a Leased Asset

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This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision.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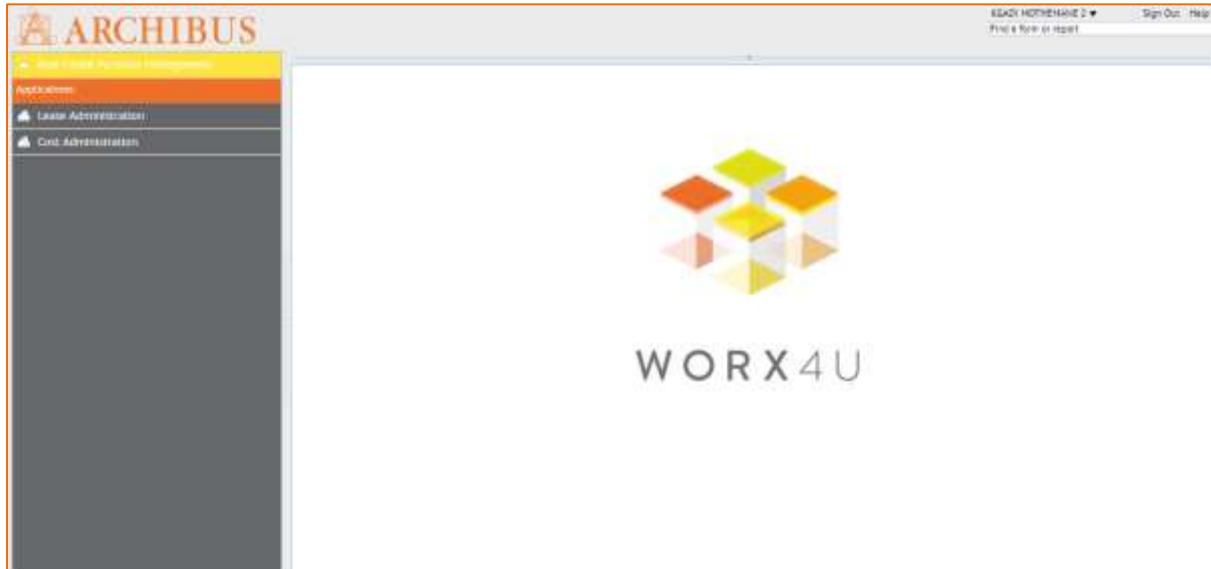

Figure 1: Sign in Window

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 task,

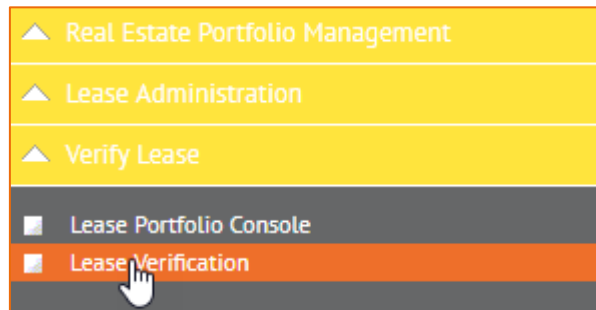1. Select Real Estate Portfolio Management **| Lease Administration | Verify Lease | Lease Verification**

Figure 4: Process Navigator

2. The Lease Verification view will be displayed listing all lease transactions awaiting verification. Selects the Lease transaction by clicking on the Lease Code to open the general lease information to be verified.
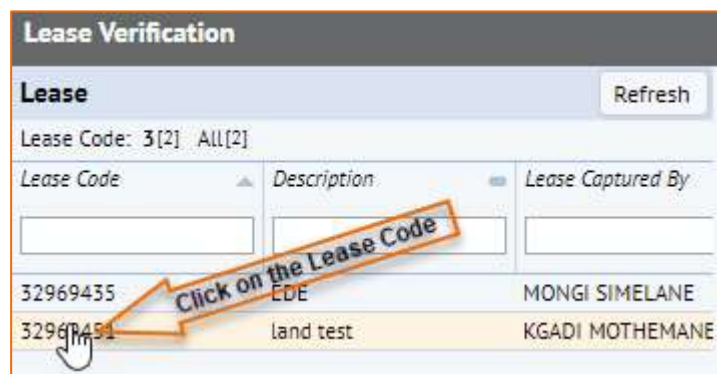

Figure 5: lease

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

Figure 6: Confirm Route for Approval

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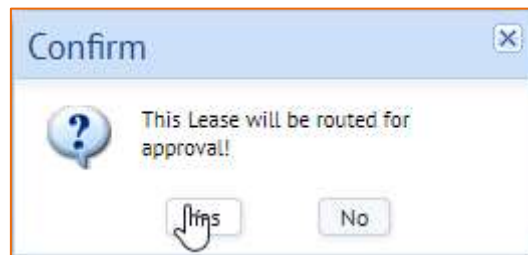

Figure 7: Route for Approval Confirmation

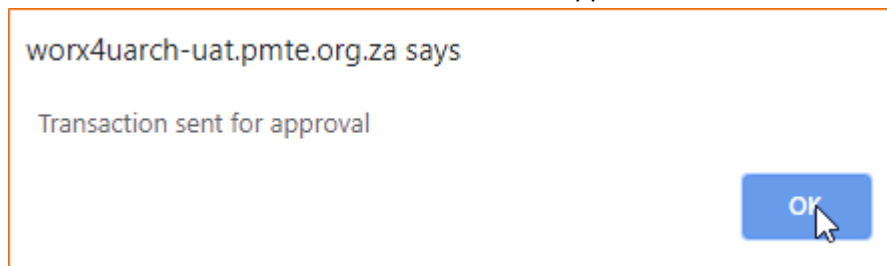5. Confirmation that the transaction has been sent for approval.

Figure 8: Transaction Sent for Approval

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

Figure 9: General Lease Information – Lease Status

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 10: Reject Option

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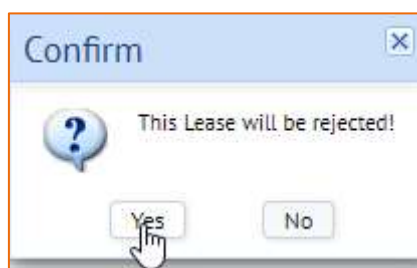

Figure 11: Confirm Reject Lease

9. If the information is reviewed and the verifier 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 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.**

Figure 12: Send for Review

10. The system will require confirmation to proceed. Confirm by clicking on **Yes**
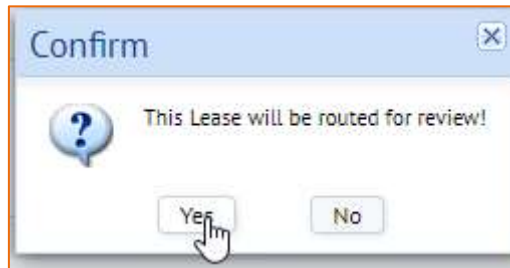
Figure 13: Route for Review

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 – Asset 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 awaiting approval.

THE END!