

## WORX4U ARCHIBUS IMPLEMENTATION:

### LEASE-IN: VERIFY LEASE

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**public works**

Department:  
Public Works  
**REPUBLIC OF SOUTH AFRICA**



**WORX4U**



## DOCUMENT CONTROL SHEET

Revision no.	Author	Date of Preparation (DD/MM/YYYY)
1.0	Mpho Nhuvunga	10/07/2019

## CLIENT DISTRIBUTION AND COMMUNICATION

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This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision.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

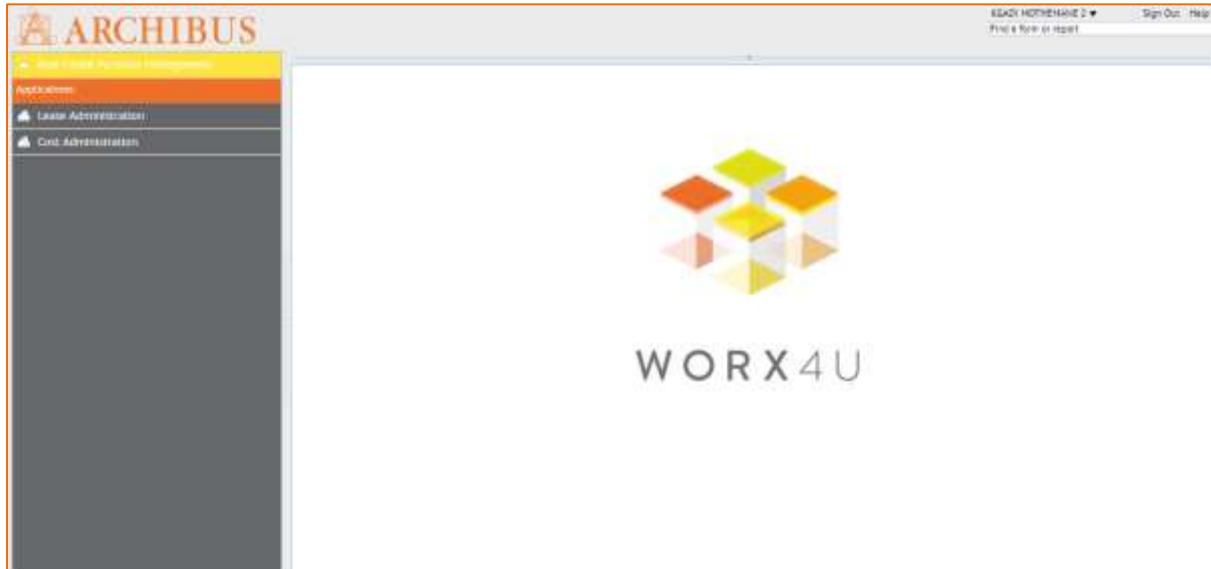
Once all login information has been typed,

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

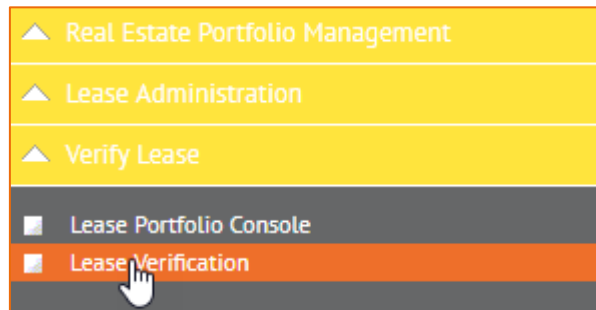


Figure 4: Process Navigator

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.

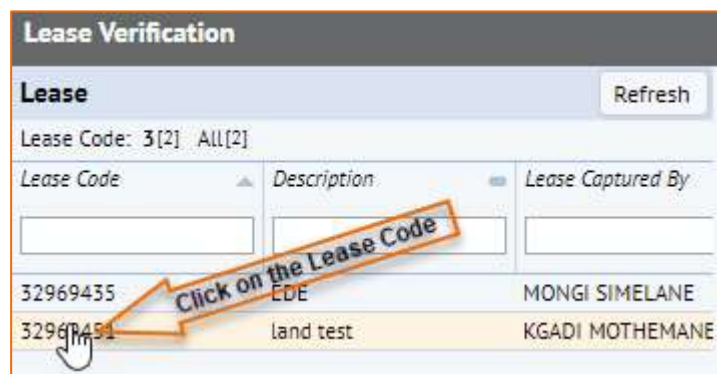


Figure 5: lease

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



Figure 6: Confirm Route for Approval



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

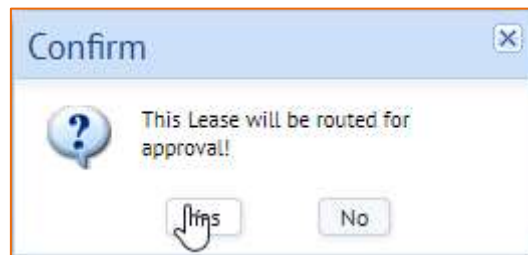


Figure 7: Route for Approval Confirmation

- Confirmation that the transaction has been sent for approval.

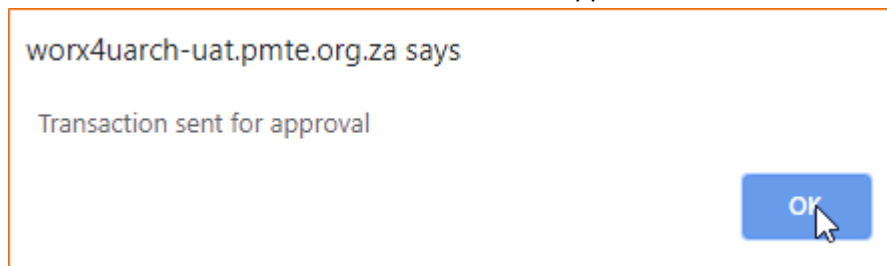


Figure 8: Transaction Sent for Approval

- 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**.

The screenshot shows the 'Lease Verification' form. In the top right corner, there are three buttons: 'Click Reject Button' (highlighted with a red box and an arrow), 'Send for Review', and 'Send for Approval'. The 'General Lease Information' section contains fields for Lease Code, Description, Building Code, Date Start, Land Code, Tenant Code, Tenant Contact, Tenant Name, Occupation Date, Area - Reg. Rentable m², Effective Date, Landlord Code, Landlord Contact, Landlord Name, Date End, Free Lease?, and Lease Status. The 'Verification Comment' field is highlighted with a red box and contains the text 'Incorrect data captured'. The 'Lease Capture Date' is 2019/07/01, 'Lease Amended Date' is 2019/07/01, 'Date sent for Review' is blank, 'Date Verified' is blank, and 'Authorized By' is blank. The 'Lease Captured By' is AGASH MATHENMAHE S, 'Lease Amended By' is AGASH MATHENMAHE S, 'Reviewed By' is blank, 'Verified By' is blank, and 'Authorized Date' is blank.

Figure 10: Reject Option

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

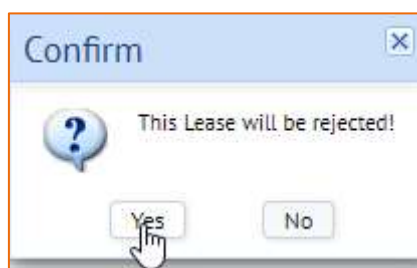


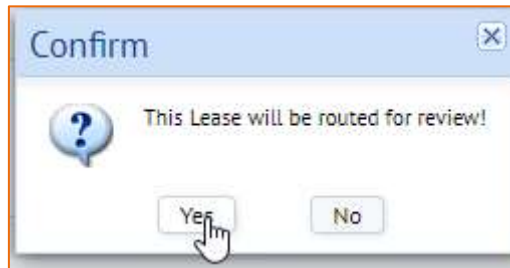
Figure 11: Confirm Reject Lease

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**.

The screenshot shows the 'Lease Verification' form. In the top right corner, there are three buttons: 'Reject' (highlighted with a red box), 'Send for Review' (highlighted with a red box and an arrow), and 'Send for Approval'. The 'General Lease Information' section contains fields for Lease Code, Description, Building Code, Date Start, Land Code, Tenant Code, Tenant Contact, Tenant Name, Occupation Date, Area - Reg. Rentable m², Effective Date, Landlord Code, Landlord Contact, Landlord Name, Date End, Free Lease?, and Lease Status. The 'Verification Comment' field is highlighted with a red box and contains the text 'Please correct the tenant name'. The 'Lease Capture Date' is 2019/07/01, 'Lease Amended Date' is 2019/07/01, 'Date sent for Review' is blank, 'Date Verified' is blank, and 'Authorized By' is blank. The 'Lease Captured By' is AGASH MATHENMAHE S, 'Lease Amended By' is AGASH MATHENMAHE S, 'Reviewed By' is blank, 'Verified By' is blank, and 'Authorized Date' is blank.

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!**