

WORX4U ARCHIBUS IMPLEMENTATION:

LEASE-IN: LEASED ASSET APPROVAL

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WORX4U



DOCUMENT CONTROL SHEET

Revision no.	Author	Date of Preparation (DD/MM/YYYY)
1.0	Mpho Nhuvunga	09/07/2019

CLIENT DISTRIBUTION AND COMMUNICATION

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

APPROVAL & SIGN OFF

Name	Signature	Title	Date of Issue
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QUERIES AND COMMENTS

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1. INTRODUCTION

This User Document provides details about how to approve a leased asset transaction.

2. SCOPE

2.1 PURPOSE

This training manual is intended for the Property Management Trading Entity

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

- Approve leased asset transactions

The Approve Asset Transactions view displays all the asset transactions that are currently pending approval. The user will be able to assess the asset details captured with the matching mandatory documents. Once a full assessment has been undertaken to ensure that all the mandatory information has been captured the approver will either approve the asset 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This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision.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**.

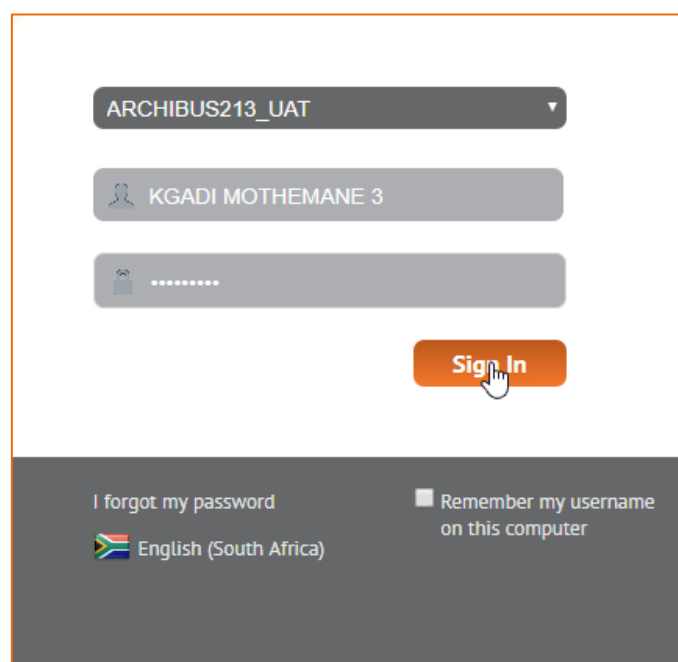


Figure 2: Sign-In

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



Figure 3: Landing Page

General Rules:

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

4. LEASED ASSET APPROVAL

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

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

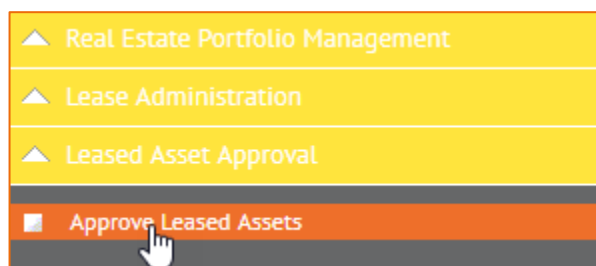


Figure 4: Process Navigator

2. The system will display the **Transactions Pending Approval** list. To approve an asset transaction, click on the **Details** button.

Transaction Code	Asset Code	Asset Name	Date of Transaction	Time of Transaction	Comment	Requestor User Name	Status	Transaction Type	Region Code
51346		HET PROPERTIES	2018/06/26	10:23 AM	HET Properties	XGADI HOTHEDHANE S	SENT FOR APPROVAL	New Asset	NEL
49118 47873		HEDBANK BUILDING	2018/05/24	12:28 PM	property file reference		SENT FOR APPROVAL	Asset Data Change	NEL

Figure 5: Transactions Pending Approval

3. The Transaction General Information view will be displayed. The information displayed will include the **Transaction Documents** and the details captured for the **Identification, Location, Size, Description, Ownership, Deeds Data, Rates and Valuations** and displays the **Change History** of the transaction.

Details for Transaction: 51346

Transaction General Information

Transaction Code: 51346
 Date of Transaction: 2018/06/26
 Time of Transaction: 10:23 AM
 Requestor User Name: XGADI HOTHEDHANE S
 Comment to Approve: HET Properties
 Accident Comment:
 Transaction Type: PROPERTY
 Status: SENT FOR APPROVAL

Transaction Documents

Document Name	Classification	Description	View Document
Proof of Valuation	PROOF OF VALUATION	Proof of Valuation	View Document
Supporting Document	SUPPORTING DOCUMENT	Supporting Document	View Document

Figure 6: Transaction General Information

Identification

Asset Name: HET PROPERTIES
 Asset Class: IP
 Asset Status:
 Asset Type: LAND
 Land Category: EIP
 EIP Number: 103
 Portion Number:
 Land Rental Code:
 Farm Name:
 Farm Number:
 Surveyor General Diagram Number:
 SRI Code: T01461100054120436
 Historic Asset Number:
 Property File Reference: 1214/5144/104
 Rural/Urban:
 Asset Description:
 Location

Town: CAROLINA
 Local Municipality: MFS01
 Local Municipality Name: Chief Albert Luthuli
 District Municipality: DCS01
 District Municipality Name: Govt of the Western Cape
 Region Code: 101
 Province Code: 101
 Country Code: 210
 Suburb:
 Township:
 Postcode:
 Street Number:
 Street Name:
 Street Type:
 Postal Code:
 Latitude: -34.0000000
 Longitude: 18.0000000
 Administrative Region: 101
 Date Physically Verified:

Figure 7: Land Transaction Detail Information

Size

Extent	3188.000
Extent Unit	SQFT

Description

Acquisition Type	LEASE AREA
Intended Asset Use	AGRICULTURE/RAISING
Current Use	AGRICULTURE/RAISING
zoning Type	AGRICULTURE

Ownership

Ownership Status	Leased
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Deeds Data

Deed Description	
Deed Number	
Deeds Office	Private

Valuations

Value - Market Valuation	
Date Market Value Assessed	
Value - Municipal Valuation	3000000.00
Effective Date Municipal Valuation	2016/06/30

Figure 8: Land Transaction Detail Information

Change History		
Date Created	2018/06/06	
Date Verified	2018/06/06	
Date Review		
Date Approval		
Date Rejected		
Comments to Verifier		
Comments to Approver		
Comments to Capturer		
Rejection Comments		
Time Created	10:23 AM	
Time Verified	2:30 PM	
Time Review		
Time Approval		
Time Rejected		
User Created	YGAD3 MOTHERNAME S.	
User Verified	YGAD3 MOTHERNAME S.	
User Review		
User Approval		
User Rejected		

Figure 9: Land Transaction Detail Information

4. 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. Before sending the transaction for review ensure that sufficient understandable comments are added for the capturer in the open Comment field. Click **Send for Review**.

Details for Transaction: 51546

Transaction General Information

Transaction Code	51546	Date of Transaction	2018/06/06
Time of Transaction	10:23 AM	Requestor User Name	YGAD3 MOTHERNAME S.
Comments to Approver	Comment: INSET Properties		
Action Comments			
Transaction Type	INSET	Status	SENT FOR APPROVAL

Buttons: Update, **Send for Review**, Reject

Figure 10: Send for Review

Note: If the approver sends a transaction for review it will be routed back to the capturer. Reject: If a Leased Asset transaction is rejected, the status is updated to REJECTED and it will reside on the View Asset Transaction Table.

5. Type in your action comment, Click Send for review then click Yes to confirm

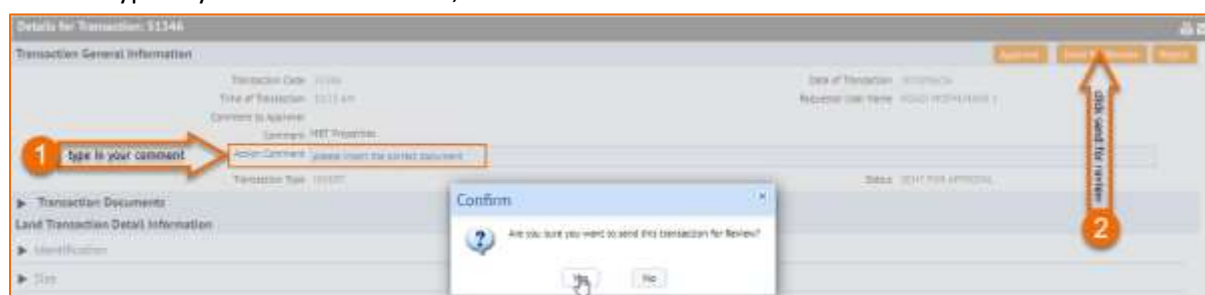


Figure 11: Action Comment

6. If you click on the Send for Review button without a comment the system will prompt you to please add a comment.

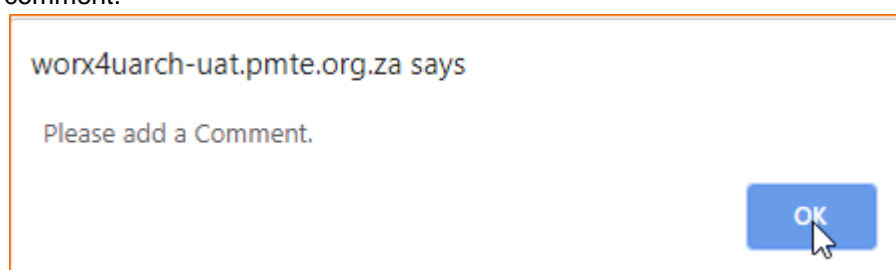


Figure 12: Add a comment

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**.

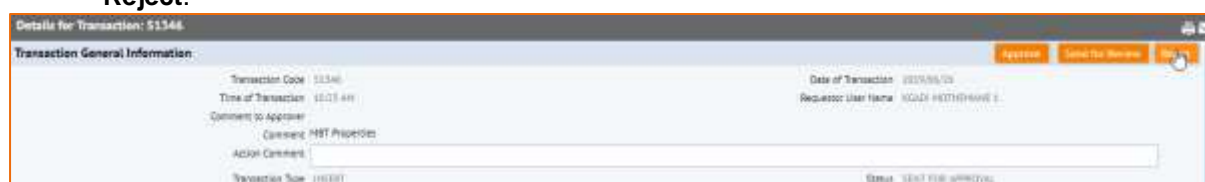


Figure 13: Reject

8. Type in your action comment, Click Reject then click Yes to confirm

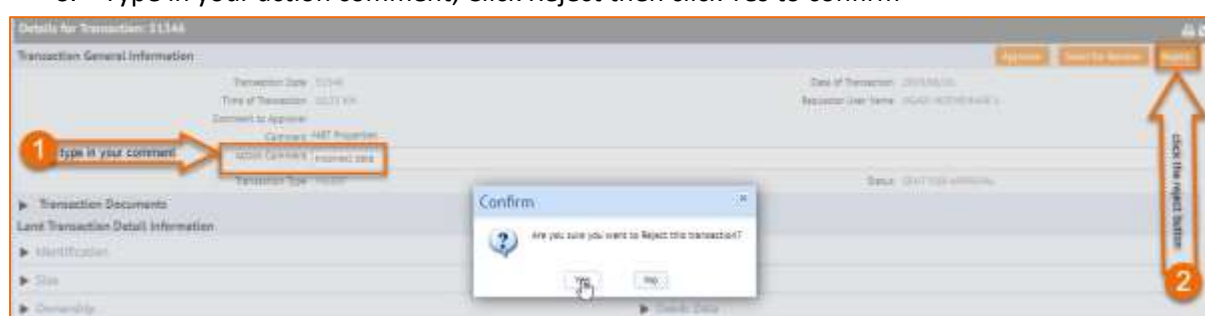


Figure 14: Action Comment

9. If you click on the Reject button without a comment the system will prompt you to please add a comment



Figure 15: Please add a comment

Note: Send for Review –If the Leased Asset transaction is missing some information and needs to be sent back to the capturer to fix the transaction is sent for review. The status of the transaction is updated to Sent for Review.

10. Once all the details have been checked and the information is in order the transaction can be approved. Click **Approve**.

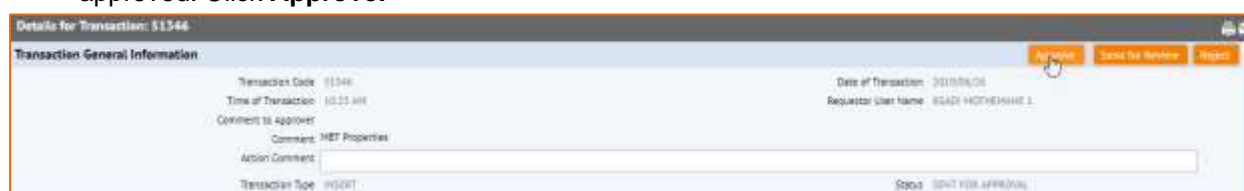


Figure 16: Approve

11. The system will prompt the approver to confirm that the Asset Transaction should be approved. Click **Yes**.



Figure 17: Confirm Approval

12. The system will generate an asset number for the leased asset added.

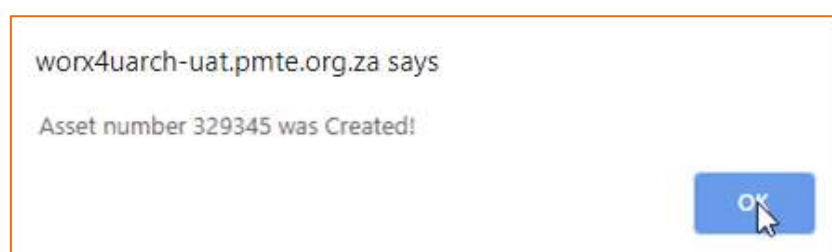


Figure 18: Asset Number Created

You have now reached the end of the manual and once the asset transaction have been approved the system will generate a unique Asset Number. The Asset will no longer be a transaction it will be added to the Asset register as an Asset on Active status.

THE END!