

WORX4U ARCHIBUS IMPLEMENTATION:

LEASE-IN: LEASE SUSPENSION APPROVAL

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WORX4U



DOCUMENT CONTROL SHEET

Revision no.	Author	Date of Preparation (DD/MM/YYYY)
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CLIENT DISTRIBUTION AND COMMUNICATION

Name	Organisation	Date of Issue (DD/MM/YYYY)
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APPROVAL & SIGN OFF

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1. INTRODUCTION

This user guide provides details about how to approve a lease suspension 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 Lease Suspension transactions

The Lease approval view displays all the leases that are currently pending approval. The user will be able to assess the lease 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 lease suspension 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This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision.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**.

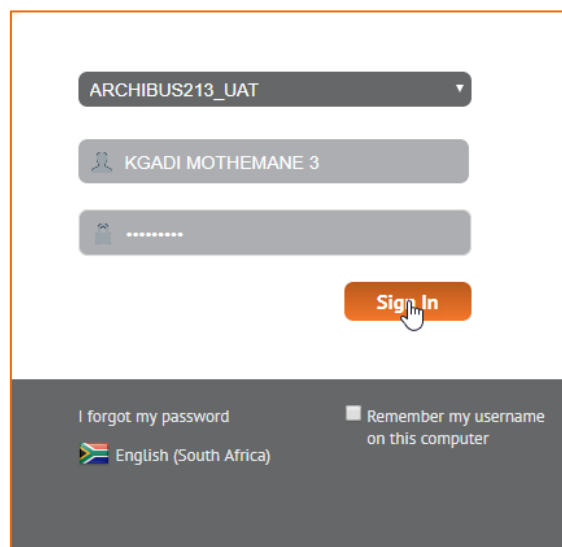


Figure 2: Sign - In

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

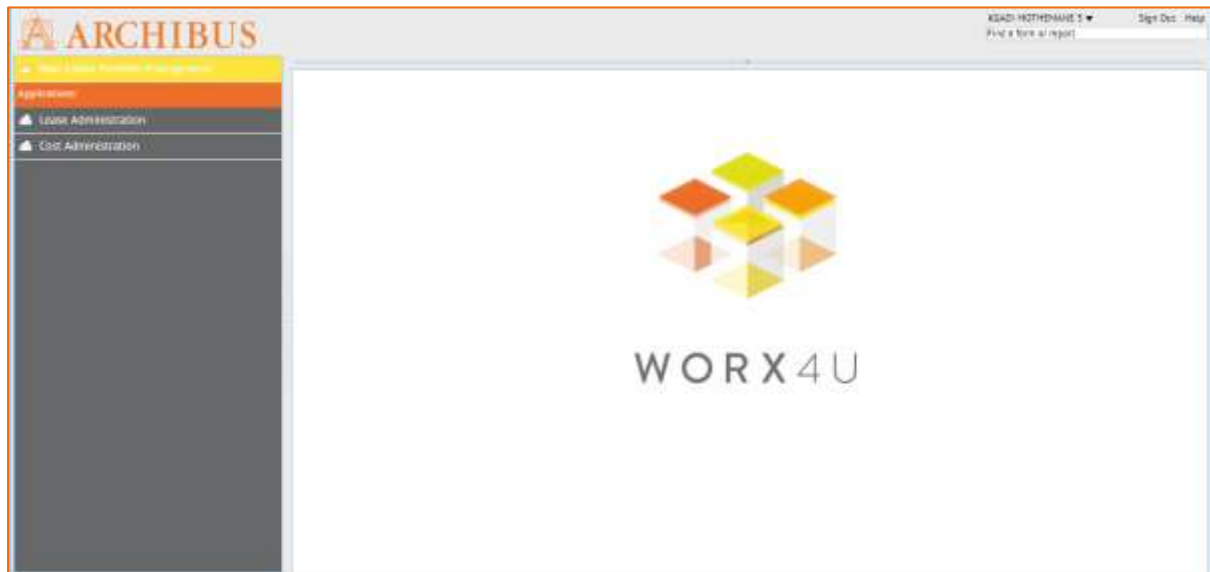


Figure 3: Landing Page

General Rules:

- This function can only be performed by the Approver.
- The Approver cannot edit the 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**

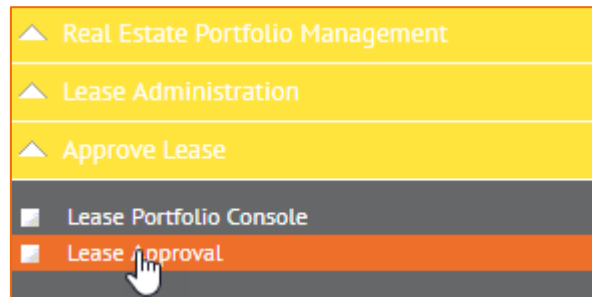


Figure 4: Process Navigator

2. In the **Lease Approval** view the user selects the lease code to open the pending transaction.



Figure 5: Lease List

3. Once the Pending Transaction has been displayed, the user clicks on the Lease Code to see the General Lease information and verifies if the information is correct, after confirming if the information is correct. The transaction will be sent for Approval

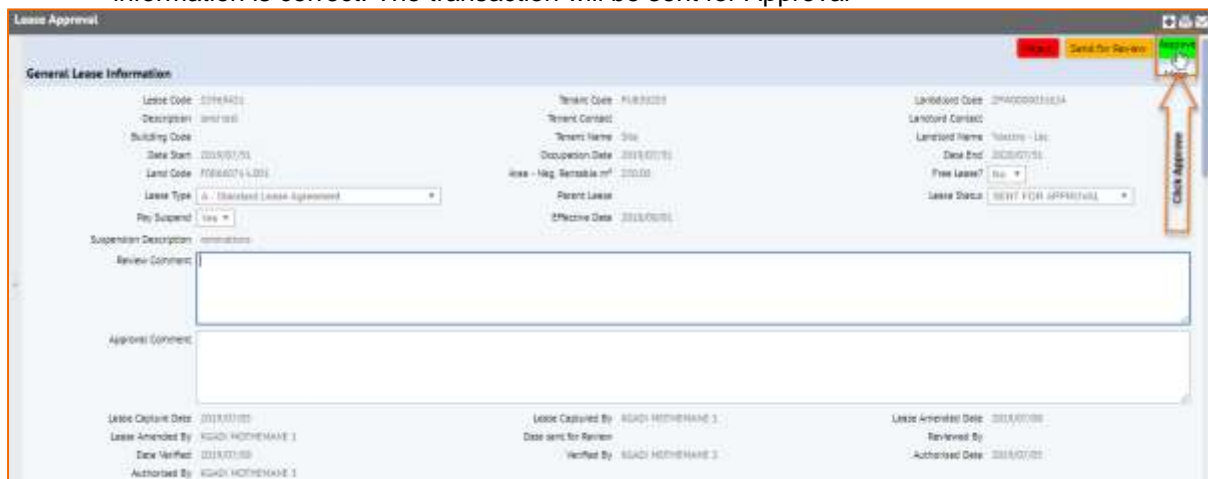


Figure 6: General Lease Information

- When the Approve Button is clicked. The system will require confirmation to proceed for lease for Approval. Confirm by clicking on Yes

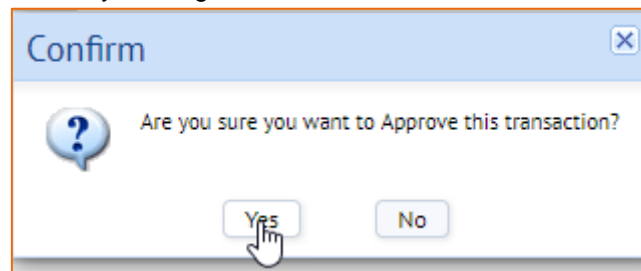


Figure 6: Approve Confirmation

- The system will confirm that the lease transaction has been Approved.

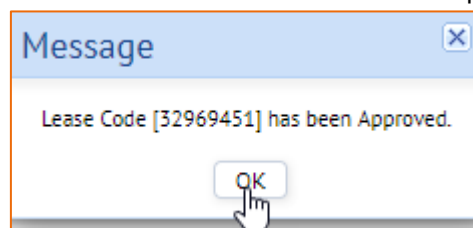


Figure 7: Approve

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

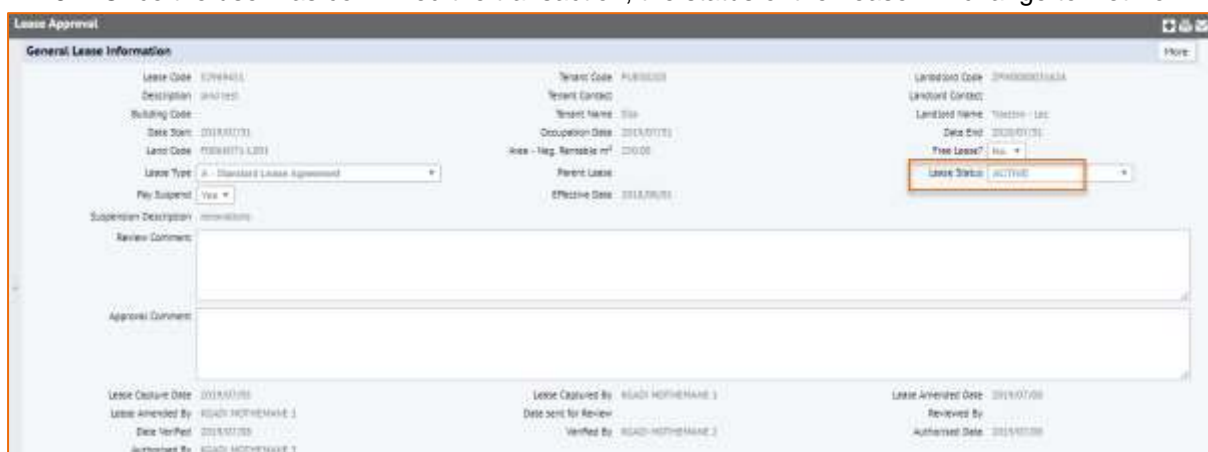


Figure 8: General Lease Information – Lease Status

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**.

The screenshot shows the 'Lease Approval' form. In the top right corner, the 'Reject' button is highlighted with a red box and an arrow pointing to it. The 'Reject Comment' field is highlighted with a red box and contains the text 'Incorrect data captured'. The form displays various lease details including Lease Code, Description, Building Code, Date Start, Land Code, Lease Type, Pay Suspense, Suspension Description, Tenant Code, Tenant Contact, Tenant Name, Occupation Date, Area - Neg. Remedia m², Permit Lease, Effective Date, Landlord Code, Landlord Contact, Landlord Name, Date End, Free Lease?, and Lease Status.

Figure 9: Reject Option

8. The system will require confirmation to proceed for lease to be rejected. Confirm by clicking on **Yes**

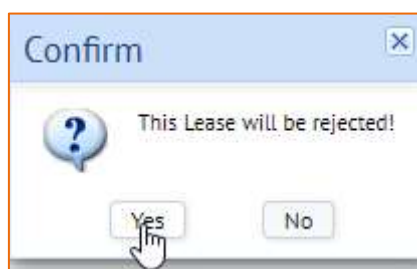


Figure 10: Rejected Confirmation

9. 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. Once the comment is completed click **Send for Review**.

The screenshot shows the 'Lease Approval' form. In the top right corner, the 'Send for Review' button is highlighted with a red box and an arrow pointing to it. The 'Review Comment' field is highlighted with a red box and contains the text 'Incorrect document uploaded'. The form displays various lease details including Lease Code, Description, Building Code, Date Start, Land Code, Lease Type, Pay Suspense, Suspension Description, Tenant Code, Tenant Contact, Tenant Name, Occupation Date, Area - Neg. Remedia m², Permit Lease, Effective Date, Landlord Code, Landlord Contact, Landlord Name, Date End, Free Lease?, and Lease Status.

Figure 11: Send for Review Option

10. The system will require confirmation to proceed for lease to be routed for review. Confirm by clicking on **Yes**

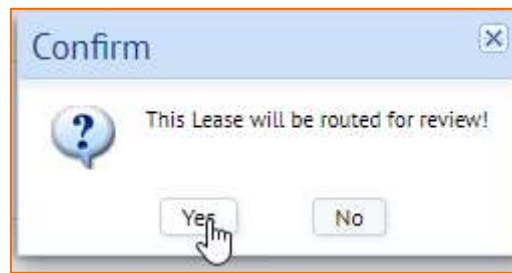


Figure 12: Routed for Review Confirmation

You have now reached the end of the manual and the lease has been suspended.

THE END!