WORX4U ARCHIBUS IMPLEMENTATION

LEASE-IN: LEASED ASSET VERIFICATION

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Name	Signature	Title	Date of Issue
K. Nekhumbe		DD:ICT Applications	31/07/2019
A. Joubert		D: Revenue and Debt	27/08/2019

QUERIES AND COMMENTS

All queries and comments in respect of this document must be addressed in writing to:

ALCM Solutions (Pty) Ltd

Office 1A
8 Kikuyu Road
Sunninghill
Sandton
2191

Contact Person:

Mongi Simelane

Email: msimelane@alcm.co.za

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1. INTRODUCTION

This user guide provides details about how to verify a leased asset transaction.

2. SCOPE

2.1 PURPOSE

This training manual is intended for the National Department of Public Works: Property Management Trading Entity. The purpose of this document is to provide details about how to:

- Verify leased asset transaction

  The Verify Asset Transactions view displays all the asset transactions that are currently pending verification. The verifier 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 verifier 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This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision.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:

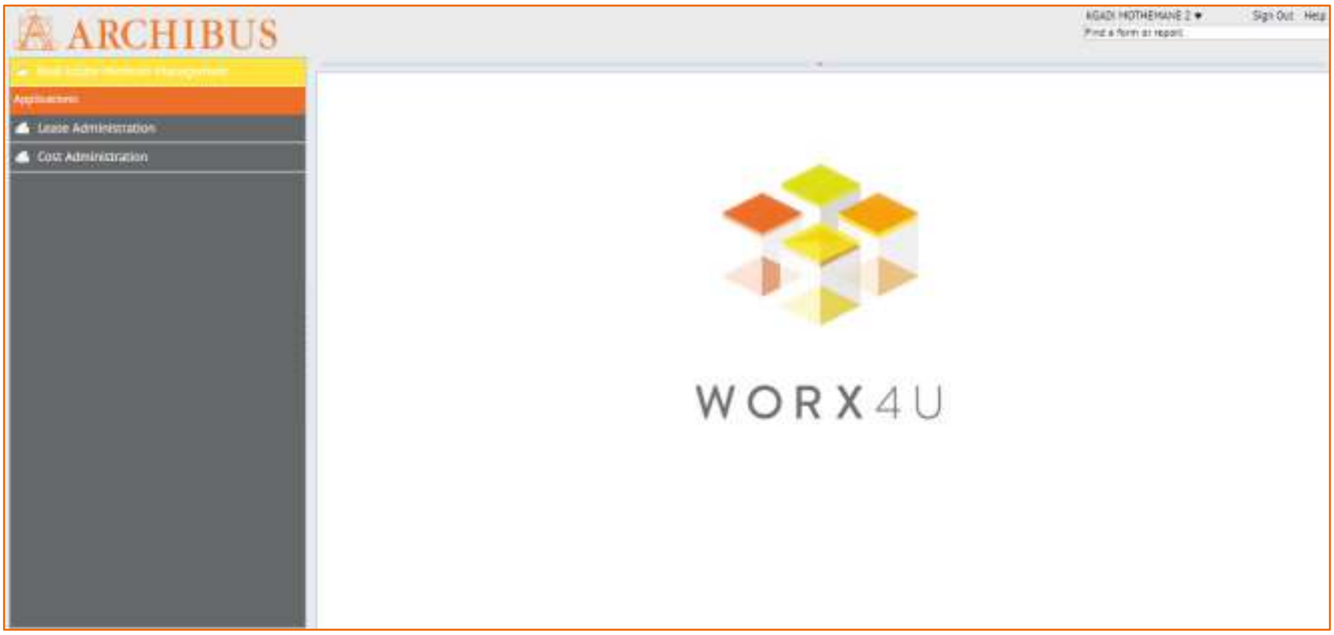

Figure 3: Landing Page

General rules:

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

4. LEASED ASSET VERIFICATION

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

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

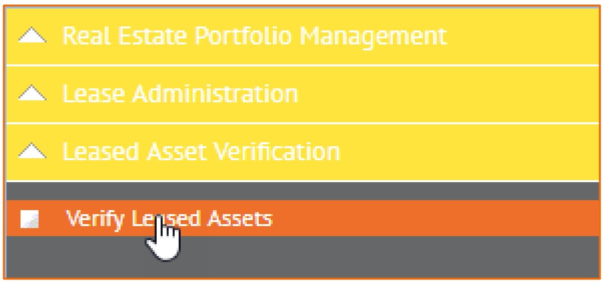

Figure 4: Process Navigator

2. The system will display the **Transactions Pending Verification** view. To verify a transaction, click on the **Details** button.

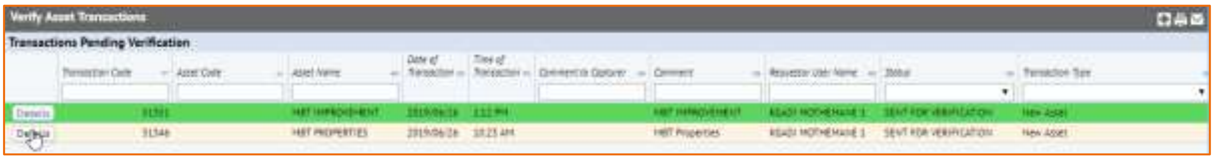

Figure 5: Transactions Pending Verification

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 also displays the **Change History** of the transaction.

Figure 6: Transaction General Information

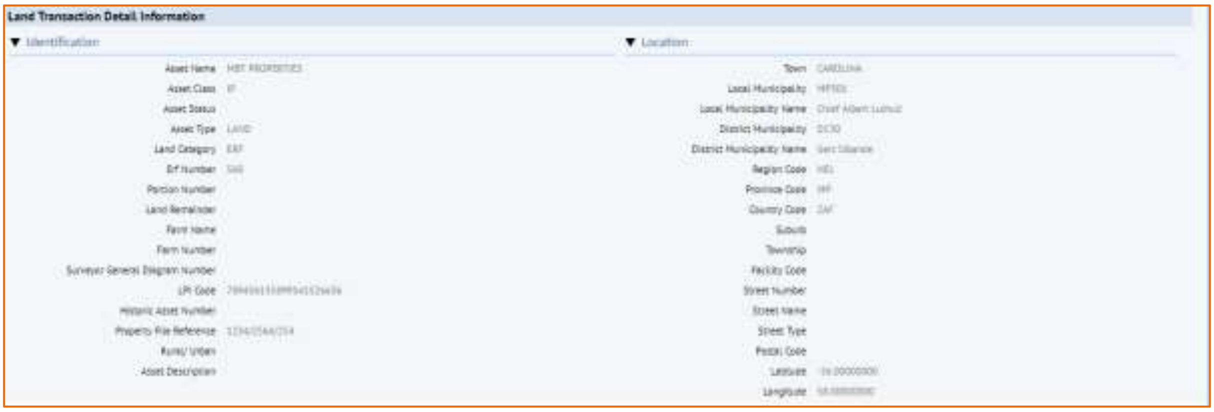

Figure 7: Land Transaction Detail Information

Figure 8: Land Transaction Detail Information

4. The Change history section shows an audit trail of the users that worked on the transaction. During the verification stage, only the user created, the Date Created and Time created fields will be populated.

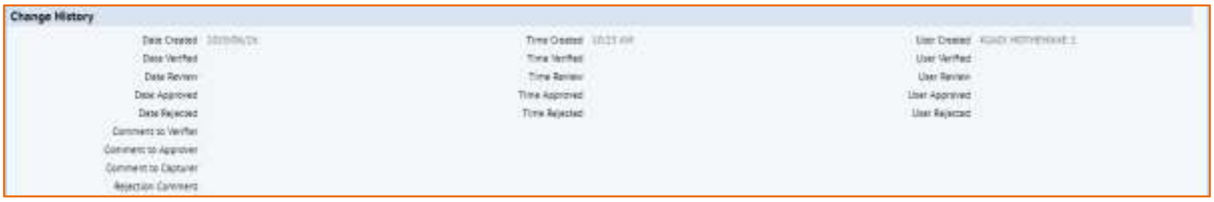

Figure 9: Land Transaction Detail Information

5. If the information is reviewed and the verifier 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 Action Comment field. Click **Send for Review.**

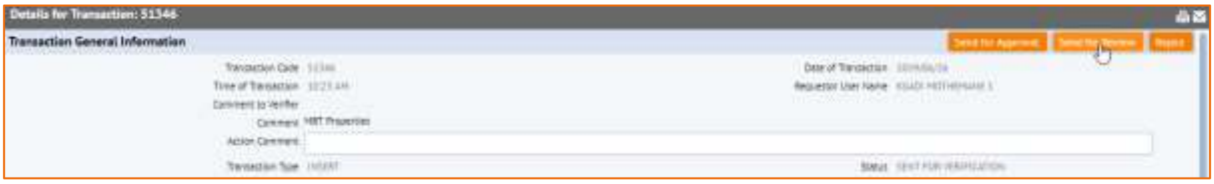

Figure 10: Send for Review

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

Figure 11: Add a comment

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

Figure 12: Reject

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

Figure 13: Please add a comment

Note: *Reject – If an asset 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 reside on the View Asset Transaction Table.*

Send for Review – Asset transaction is missing some information and will be sent back to the capturer to fix.

9. Once all the information has been verified as correct click **Send for Approval**.

Figure 14: Send for Approval

10. Confirm that the transaction should be sent for approval by clicking **Yes**.

Figure 15: Confirm Route for Approval

Figure 16: Sent for Approval

You have now reached the end of the manual and the asset transaction will lie within the **Transactions Pending Approval** table and will be awaiting approval.

THE END!