

WORX4U ARCHIBUS IMPLEMENTATION

LEASE-IN: CREATE A LEASED ASSET

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WORX4U



DOCUMENT CONTROL SHEET

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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
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;

CONTENTS	
DOCUMENT CONTROL SHEET	2
CLIENT DISTRIBUTION AND COMMUNICATION.....	2
APPROVAL & SIGN OFF	3
QUERIES AND COMMENTS	3
1. INTRODUCTION	5
2. SCOPE	5
2.1 PURPOSE	5
2.2 APPLICABILITY	5
3. CONNECT TO ARCHIBUS	6
4. CREATE A LEASED ASSET	8

1. INTRODUCTION

Before leases can be registered against a property the property first needs to be added to the Leased Asset Register in the Real Estate Portfolio Management module. The property is registered as a leased asset in the Real Estate Portfolio Management module and then maintained within the **Manage Leased Assets** task. An asset can only be created once, it can either be Land or Improvement.

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:

- Add an asset that a lease must be loaded against- Only a capturer can perform this function.

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This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision.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

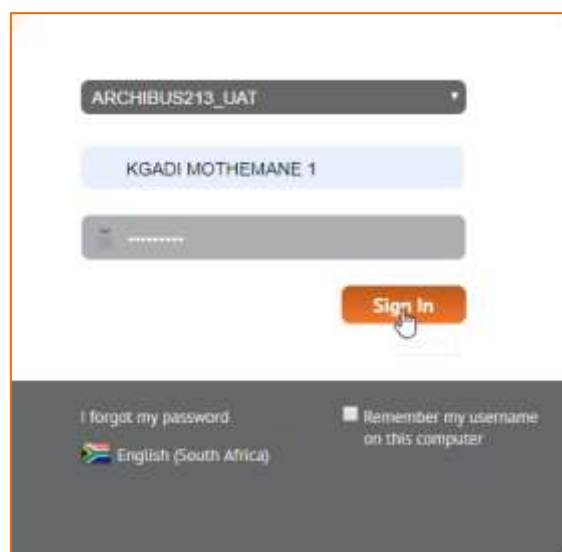


Figure 2: Sign - In

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

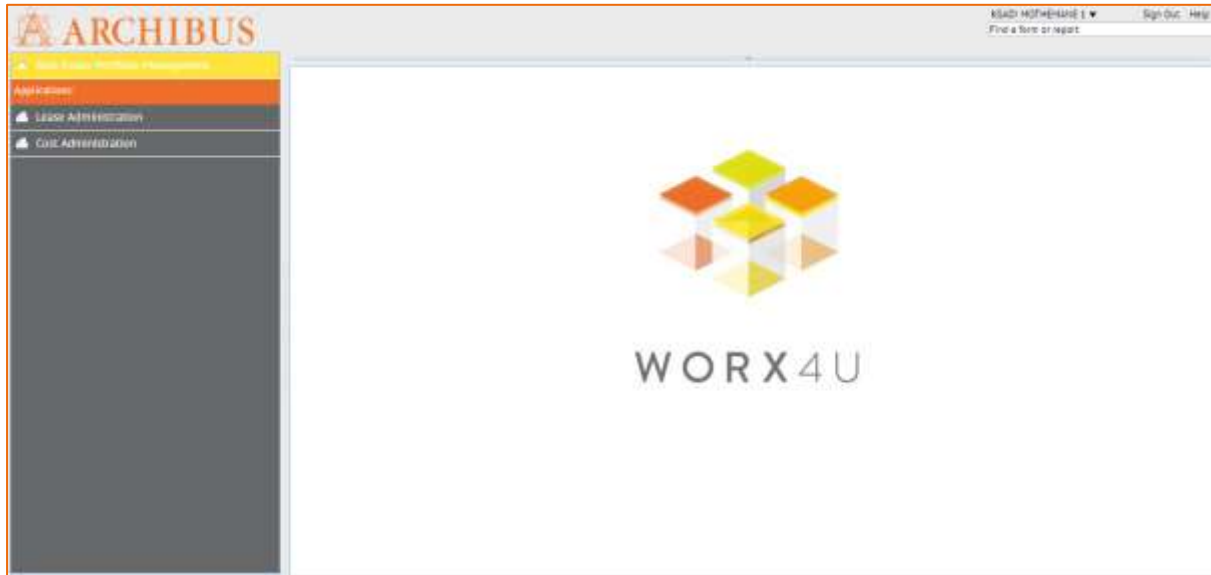


Figure 3: Landing Page

General Rules:

- *An asset can only be created once, it can either be Land or Improvement.*
- *A lease cannot be loaded before the asset is created.*
- *If an asset has been created -all future leases relating to that asset must be linked to the asset that has been created*
- *A field with a red Asterix (*) means the field is a mandatory field*
- *The state of the transaction type will default to New Asset because the Asset transaction is captured for the first time.*
- *By selecting Save it means that you are saving all the information you have captured, and the asset transaction will be sitting with the capturer on a saved status.*
- *Save and send for verification means that you are routing the asset transaction for varication.*
- *The system will automatically generate a unique Transaction Code once the transaction has been saved.*
- *Asset Class is defaulted to IP (Investment Property) and Asset Type to Land*

4. CREATE A LEASED ASSET: Land or Improvement

To access the task: Create Leased Assets,

1. Select **Real Estate Portfolio Management | Lease Administration | Leased Asset Creation | Create Leased Assets**.

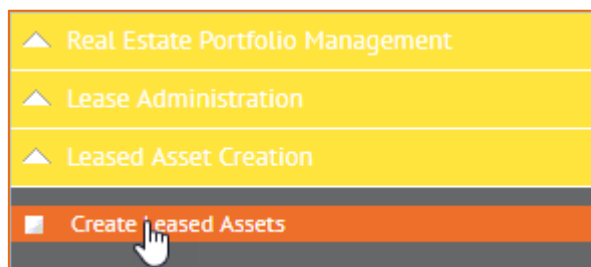


Figure 4: Process Navigator

2. The system will open the **Manage New Leased Assets** view. In this view the system displays asset transactions that are either on a Saved or Sent for Review status. New assets can also be captured in this view using the **Add New Asset** button as illustrated in the image below (figure:5).

Take note that different transaction types have different color highlights:

- Green - New assets transactions
- Blue - Asset data changes on assets already existing in the asset register

Click on the **Add New Asset** button.



Figure 5: Add New Asset

3. Select the **Add Land** option

Tip: Land should only be selected when the purpose of the lease is for farming or agricultural and if the lease is for a building – select improvement

Manage New Leased Assets

Capture Profile

Transaction Code	Asset Name	Asset Type	Date of Transaction	Time of Transaction	Comment	Requester User Name	Action
11152	JUVESCHY	LAND	2019/05/23	1:17 PM	Intty	VICTOR MANAMELA	SAVED
11173	RHC KAMEELFONTEIN 311 JR	LAND	2019/05/29	3:32 PM	KameelFontein 311 JR	RITA MCSHERRY 1	SAVED
11149		LAND	2019/05/24	12:50 PM		HONG SHELANE	SAVED
11190		LAND	2019/04/25	8:58 PM		HONG SHELANE	SAVED
11189		LAND	2019/04/25	8:54 PM		TONDANI HAFUNISE	SAVED
10139		LAND	2019/05/23	9:28 AM		SHARON TLEANE	SAVED
10074		LAND	2018/11/07	1:21 PM			SAVED
10090		LAND	2018/11/07	10:25 AM			SAVED
10049		LAND	2018/11/07	10:24 AM			SAVED
10048		LAND	2018/11/07	10:02 AM			SAVED
10048		LAND	2018/11/07	9:36 AM			SAVED
10045		LAND	2018/11/07	9:01 AM			SAVED
10043		LAND	2018/11/06	2:28 PM			SAVED
10042		LAND	2018/11/06	2:24 PM			SAVED
10041		IMPROVEMENT	2018/11/06	2:14 PM			SAVED
10040		LAND	2018/11/06	2:14 PM			SAVED
10039		LAND	2018/11/06	2:00 PM			SAVED
10038		LAND	2018/11/06	1:43 PM			SAVED
10037		LAND	2018/11/06	1:39 PM			SAVED
10036		LAND	2018/11/06	1:35 PM			SAVED

Figure 6: Add land

4. When adding New Land, information such as the **Transaction Detail, Identification, Location, Size, Description, Ownership, Deeds Data, and Valuations** details can be captured.

Add New Leased Land

Asset Information

- Transaction Detail
- Identification
- Location
- Size
- Description
- Ownership
- Deeds Data
- Valuations

Change History

User Created	Date Created	Time Created
User Requestor	Date Requested	Time Requested
User Verified	Date Verified	Time Verified
User Approved	Date Approved	Time Approved
User Review	Date Review	Time Review
User Rejected	Date Rejected	Time Rejected
Comment		
Comment to Verifier		
Comment to Approver		

Figure 7: Add New Land

5. Complete all the required Information in the following sections: Transaction Detail; Identification; Location; Size; Description; Ownership; Deeds Data; Valuations. Capturer comment is used by the capturer when creating a new leased asset and an action comment is used by the verifiers and the approver when a transaction is rejected or sent for review.

➤ **Transaction Detail**

The screenshot shows the 'Add New Leased Land' form with the 'Transaction Detail' section expanded. The form contains the following fields and values:

- Transaction Code: [Empty]
- Date of Transaction: 2019/06/28
- Time of Transaction: 9:38 AM
- Requestor User Name: KGADI MOTHENANE
- User Created By: [Empty]
- Capturer Comment: MGT Properties
- Review Comment: [Empty]
- Action Comment: [Empty]
- Transaction Type: New Asset
- Status: SAVED

Figure 8: Transaction Detail

➤ **Identification**

Note:

- If Agricultural Holding is selected, then all the fields will be open to be completed.
- If ERF is selected then Portion Number, Land Remainder, Farm Name and Farm Number fields will be greyed out and only the Erf field is to be completed because it speaks to the land category selected.
- If Farm is selected, then all the fields will be open to be completed.

Tip: If there are fields that are not available: The user will have to contact call centre and a ticket will be created and submitted to ICT to add the requested field.

Tip: User need to Obtain the LPI Code before starting to capture the leased asset.

The screenshot shows the 'Add New Leased Land' form with the 'Identification' section expanded. The form contains the following fields and values:

- Asset Name: MGT PROPERTIES
- Asset Class: IP
- Asset Type: LAND
- Land Category: ERF
- Erf Number: 568
- Portion Number: [Greyed out]
- Land Remainder: [Greyed out]
- Farm Name: [Greyed out]
- Farm Number: [Greyed out]
- Surveyor General Diagram Number: [Greyed out]
- LPI Code: 789456135899541526636
- Property File Reference: 1234/1234/1234
- Rural/Urban: [Dropdown menu]
- Asset Description: [Empty]

Figure 9: Identification

➤ Location

Note: Once a city has been selected the **Local Municipality Code**, **Local Municipality Name**, **District Municipality**, **Region Name**, **Province Code**, **Province Name** and **Country Code** fields will be auto populated based on the location background data.

Tip: You can also get the GPS coordinates from GOOGLE maps if it is not available

Figure 10: Location

➤ Size

Note: The extent will be converted to sqm irrespective of the unit of measurement selected.

Figure 11: Size

➤ Description

Figure 12: Description

➤ Ownership

The **Ownership Status** defines whether PMTE is the Owner or the Lessee of the property. If the PMTE is the landlord of the property, then the **Ownership Status** is **State-Owned**. When capturing a Leased Asset, the **Ownership Status** defaults to **“Leased”**.

Figure 13: Ownership

➤ Deeds Data

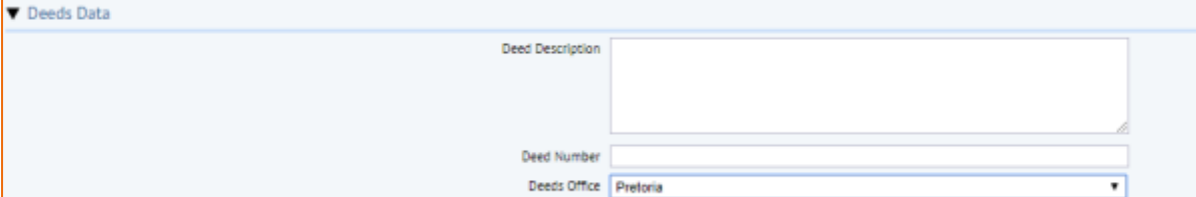


Figure 14: Deeds Data

➤ Valuations

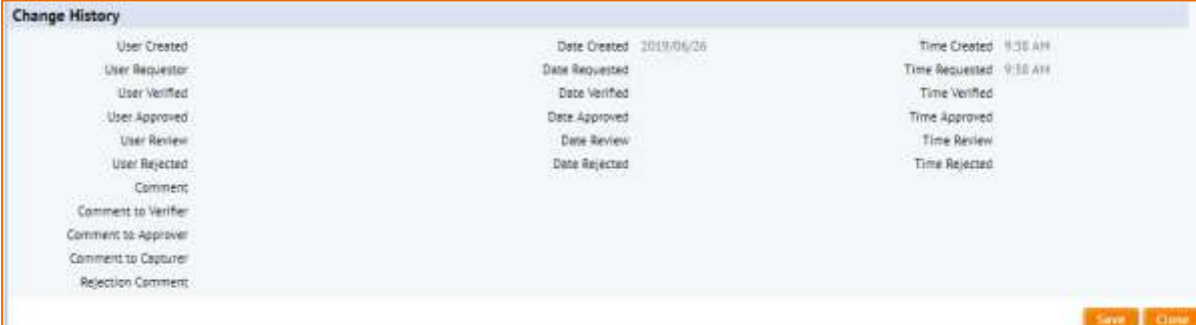
Note: date of valuation cannot be in the future



Figure 15: Valuations

➤ Change History

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



Action	Date	Time
User Created	2019/06/26	9:36 AM
User Requestor		9:36 AM
User Verified		
User Approved		
User Review		
User Rejected		
Comment		
Comment to Verifier		
Comment to Approver		
Comment to Capturer		
Rejection Comment		

Figure 16: Change History

6. Once all mandatory fields have been completed click **Save**.

The screenshot shows a web form titled "Add New Leased Land". It has several sections with expandable headers: Identification, Location, Size, Description, Ownership, Deeds Data, and Valuations. Below these is a "Change History" section containing a table of actions and timestamps.

Action	Date	Time
User Created	2019/06/26	9:38 AM
User Requester		9:38 AM
User Verified		
User Approved		
User Review		
User Rejected		
Comment		
Comment to Verifier		
Comment to Approver		
Comment to Capturer		
Rejection Comment		

At the bottom right, there are two buttons: "Save" and "Close". A mouse cursor is pointing at the "Save" button.

Figure 17: Save

7. Once you click the “save” button, the system will prompt you to confirm that the asset transaction should be saved. Click OK to proceed

The screenshot shows a confirmation dialog box. The text inside reads: "worx4uarch-uat.pmte.org.za says" followed by "Are you sure you want to save this Asset Transaction?". At the bottom right, there are two buttons: "OK" and "Cancel". A mouse cursor is pointing at the "OK" button.

Figure 18: Save Confirmation

8. Once the transaction has been saved the system generates a **Transaction Code** and auto populate the **User Created By** field.

The screenshot shows a "Transaction Detail" form. It contains several fields, some of which are highlighted with red boxes:

- Transaction Code: 81548
- Date of Transaction: 2019/06/26
- Time of Transaction: 10:23 AM
- Requestor User Name: KGADI MOTHEHANE 1
- User Created By: KGADI MOTHEHANE 1
- Capture Comment: HBT Properties
- Review Comment: (empty text area)
- Action Comment: (empty text area)
- Transaction Type: New Asset
- Status: SAVED

Figure 19: Transaction Detail

9. The system will prompt for a mandatory document namely the Supporting Document to be uploaded by enabling only the Edit button. The transaction cannot be routed for verification without uploading the mandatory document to the transaction.

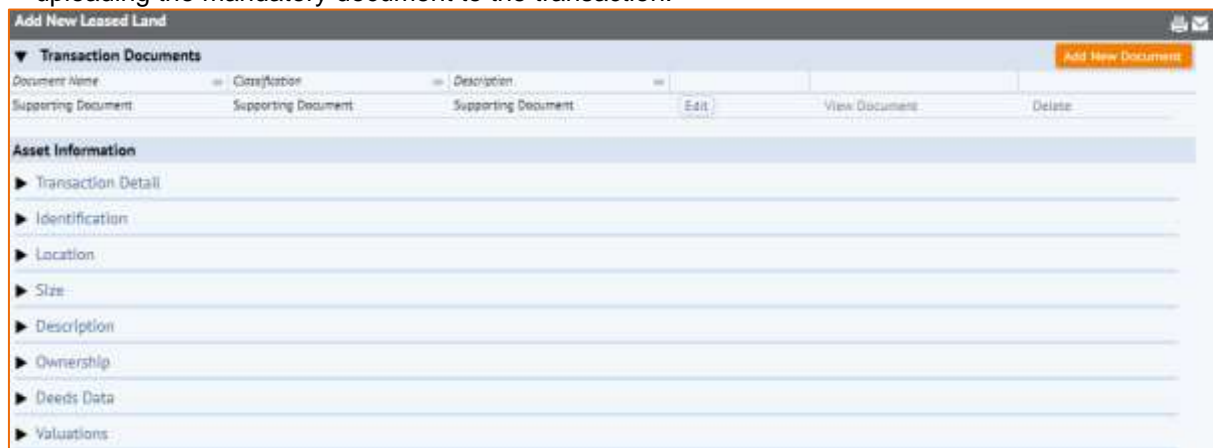


Figure 20: Transaction Documents

10. The user has an option to **edit** the document information and **viewing** the document will be enabled once the upload is done. To upload a document to the transaction, click on the **Edit button**.



Figure 21: Upload Document

11. Complete all the mandatory fields then click on the **Check in New Document** icon to upload the document

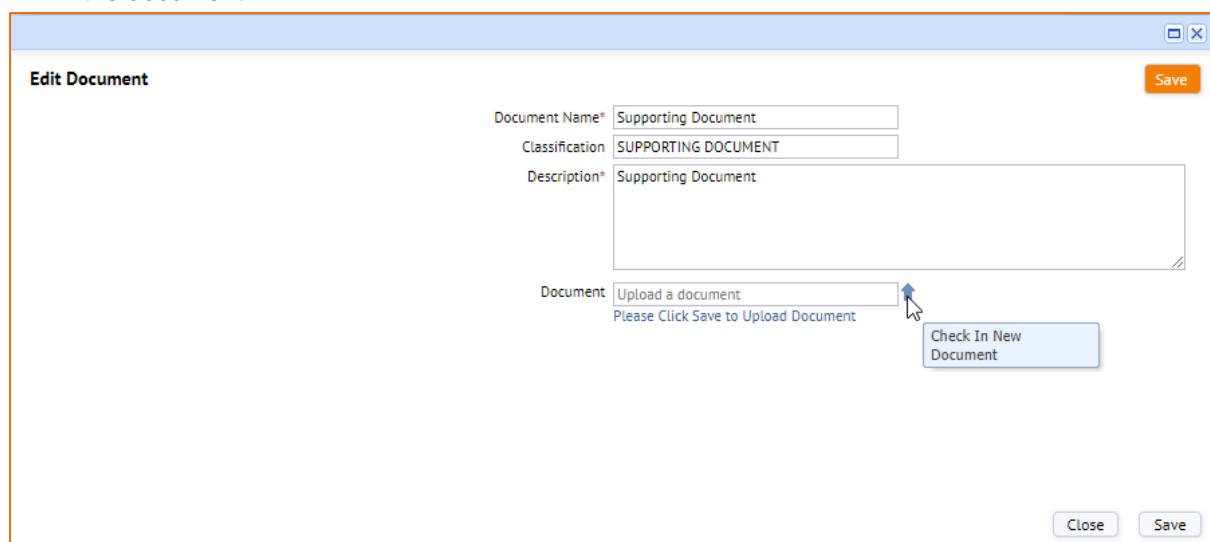


Figure 22: Edit Document

12. Click on the **Choose File** button to upload the document

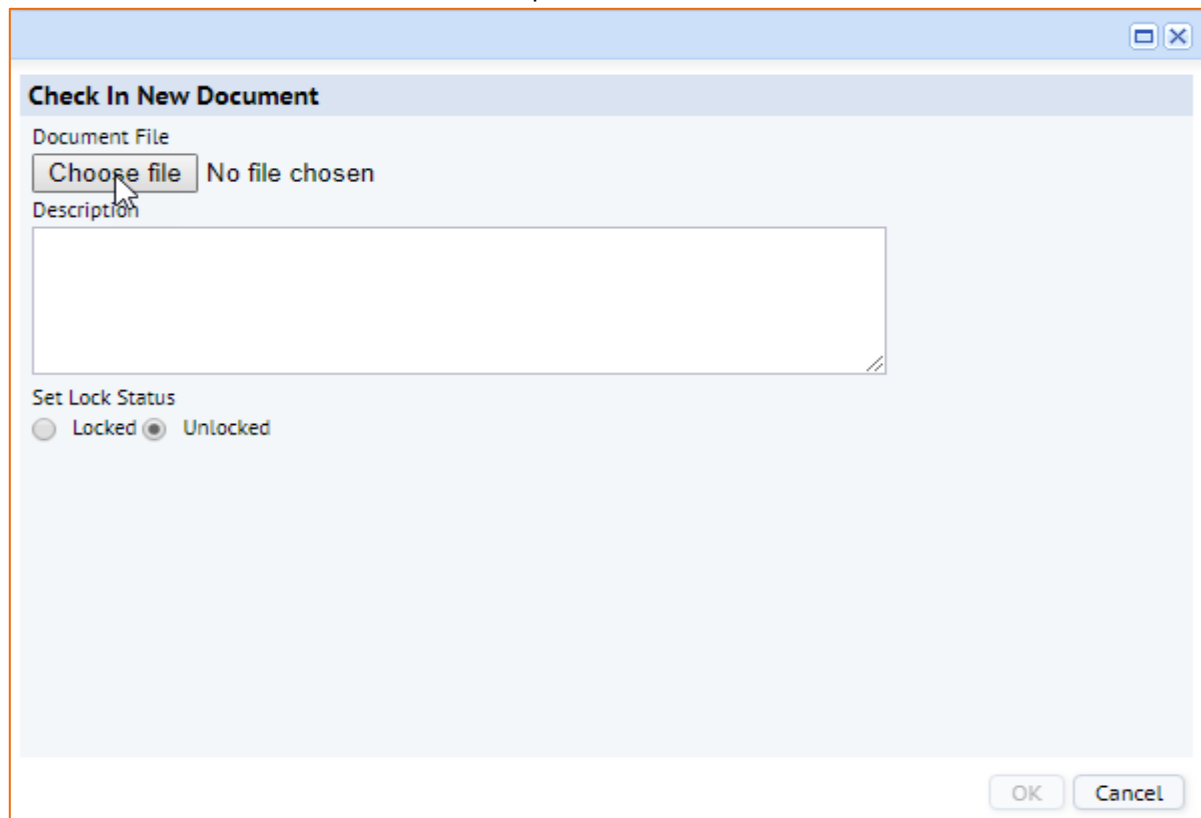


Figure 23: Choose File

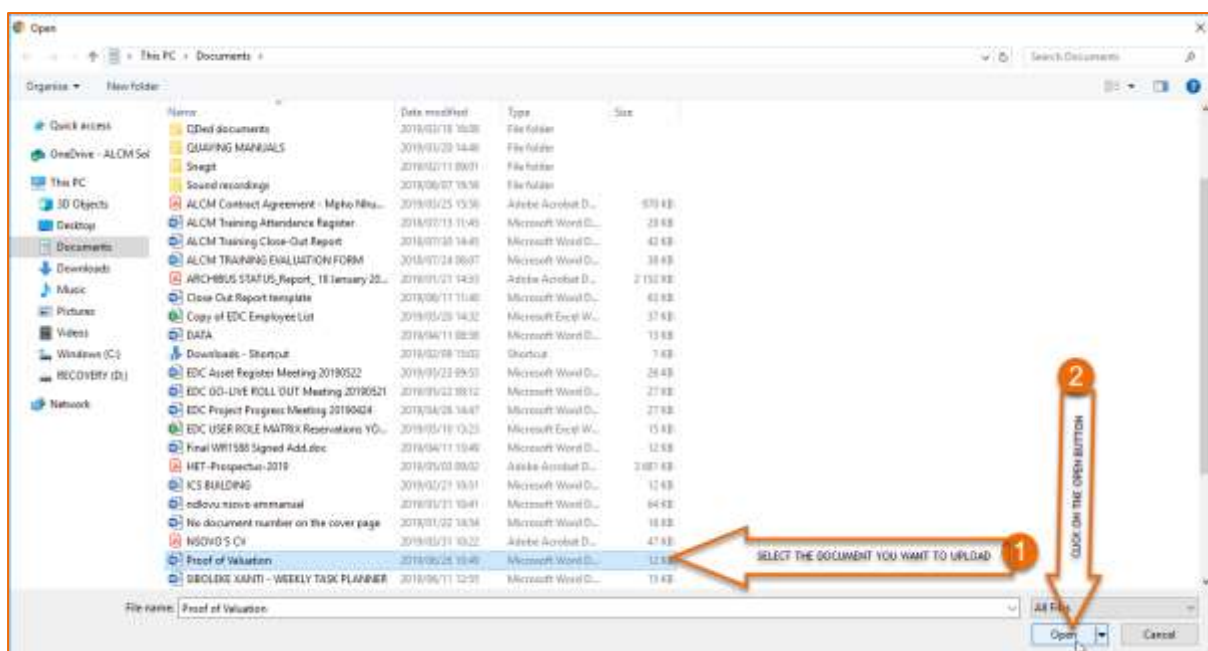
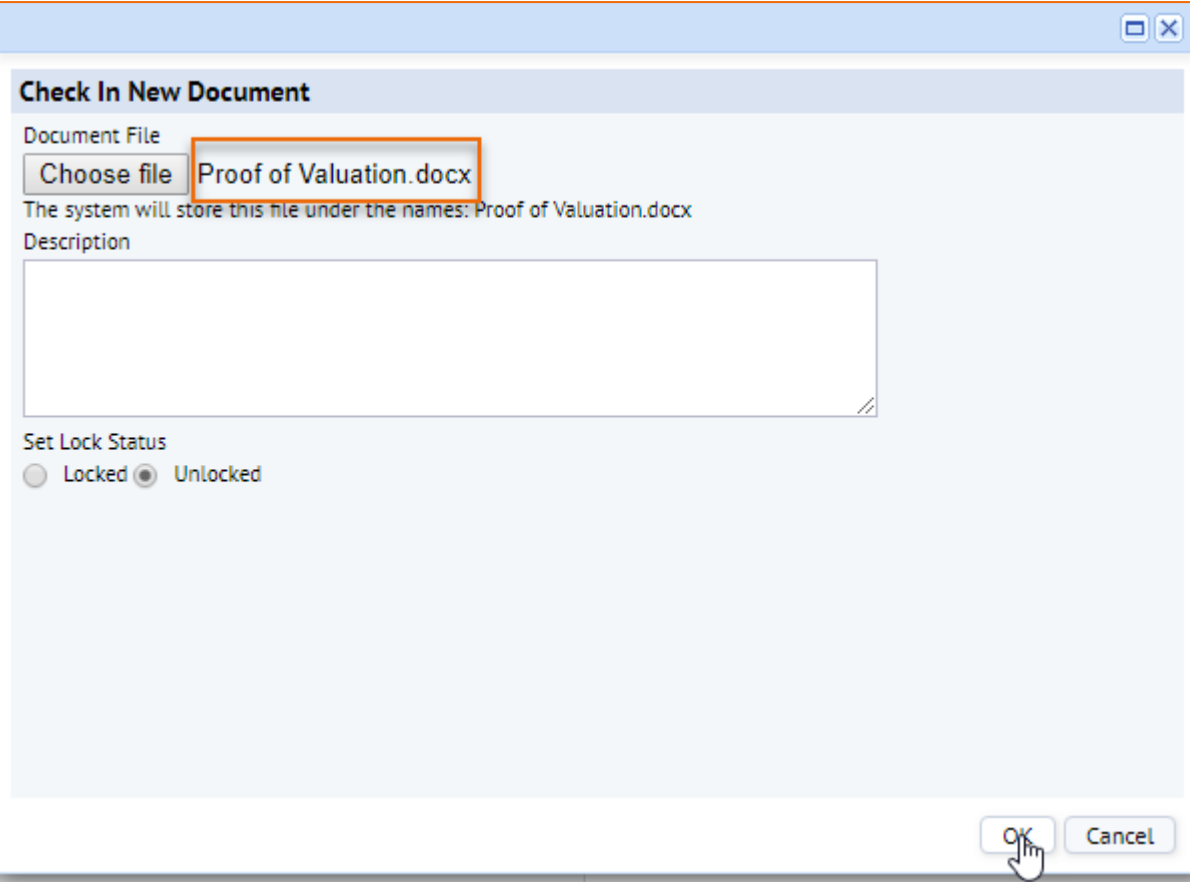


Figure 24: Choose File

13. The name of the attached document will be displayed next to the **Choose File** button as illustrated below.



Check In New Document

Document File

Choose file Proof of Valuation.docx

The system will store this file under the name: Proof of Valuation.docx

Description

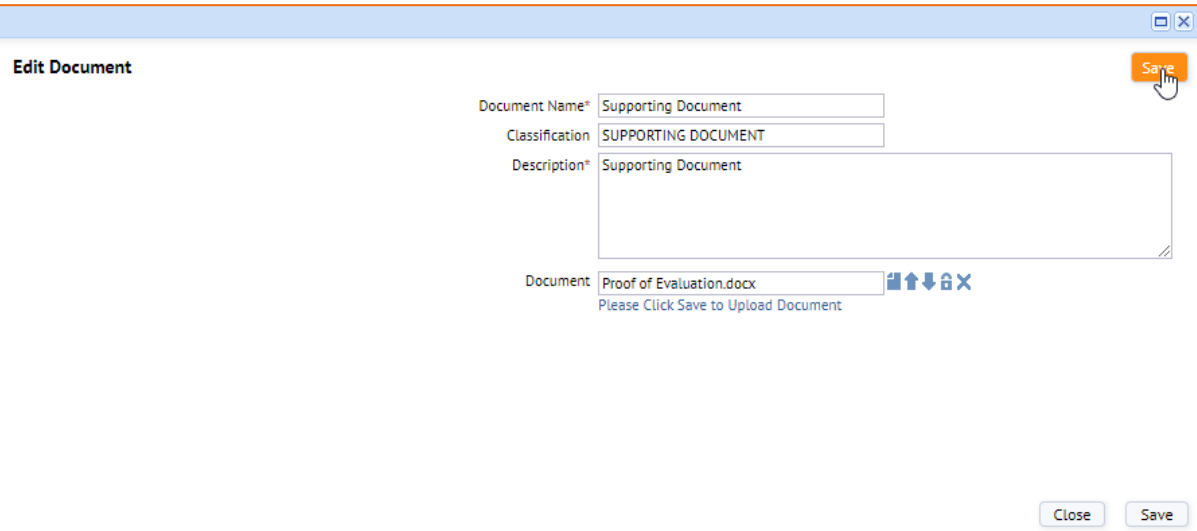
Set Lock Status

☐ Locked ☒ Unlocked

OK Cancel

Figure 25: Uploaded Document

14. Once the document has been uploaded click save.



Edit Document

Document Name* Supporting Document

Classification SUPPORTING DOCUMENT

Description* Supporting Document

Document Proof of Evaluation.docx Please Click Save to Upload Document

Save

Close Save

Figure 26: Edit Document - Save

15. When you revert to the transaction document panel the View Document button will be enabled. To view the document, click **View Document**



Figure 27: Transaction Documents - View Document

16. Once View Document is selected the system will generate the uploaded document. Click on the link to open the document.

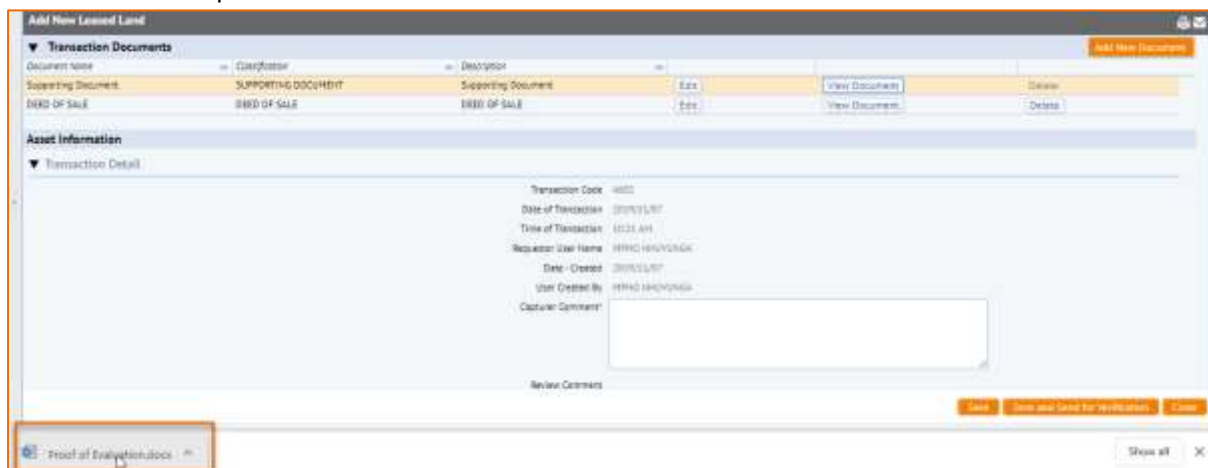


Figure 28: View Document

17. The Delete button on the mandatory documents is greyed out as user is not allowed to delete the name conversion of the document.

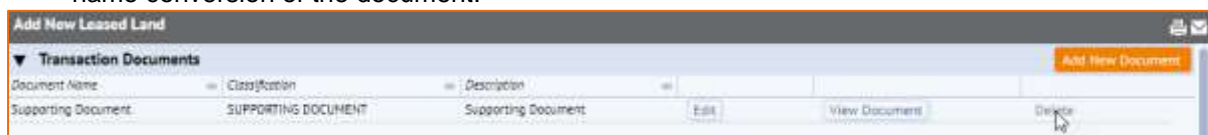


Figure 29: Transaction Documents – Delete

18. To delete the uploaded mandatory document, Click Edit



Figure 30: Edit button

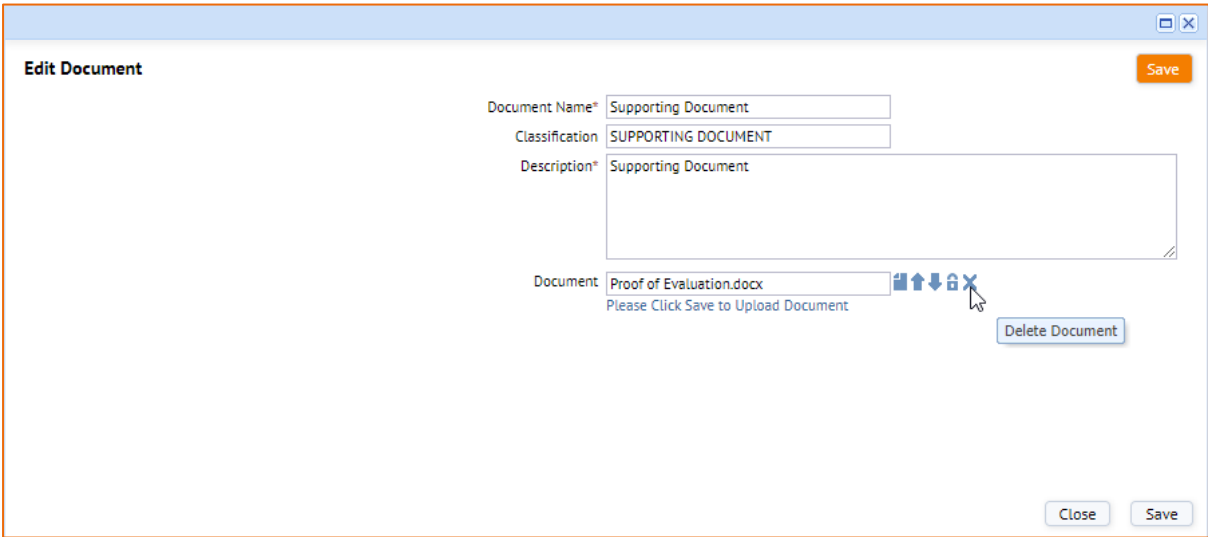


Figure 31: Delete the uploaded document

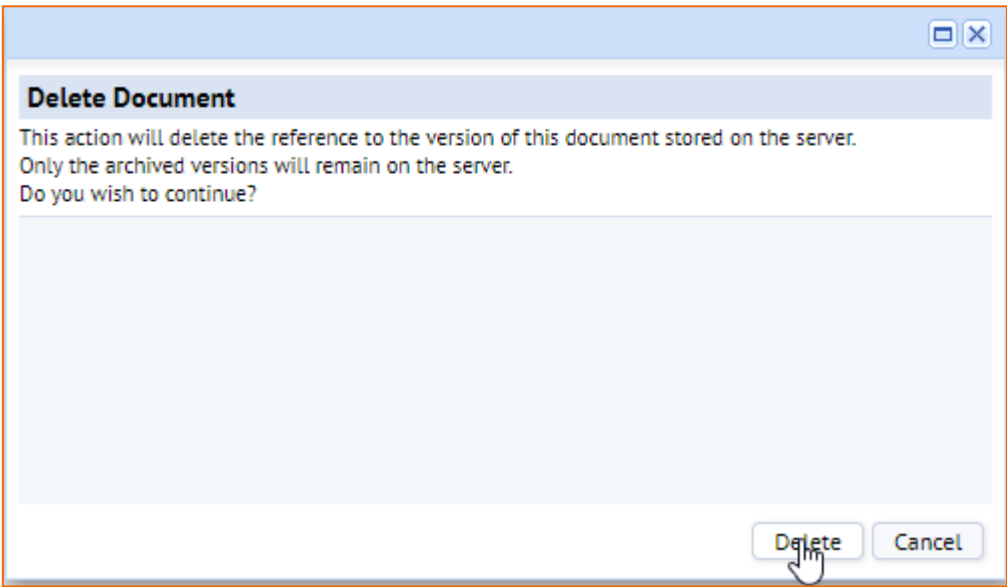


Figure 32: Delete



Figure 33: Delete Document

19. To upload any additional optional documents to the transaction, click on the **Add New Document button**

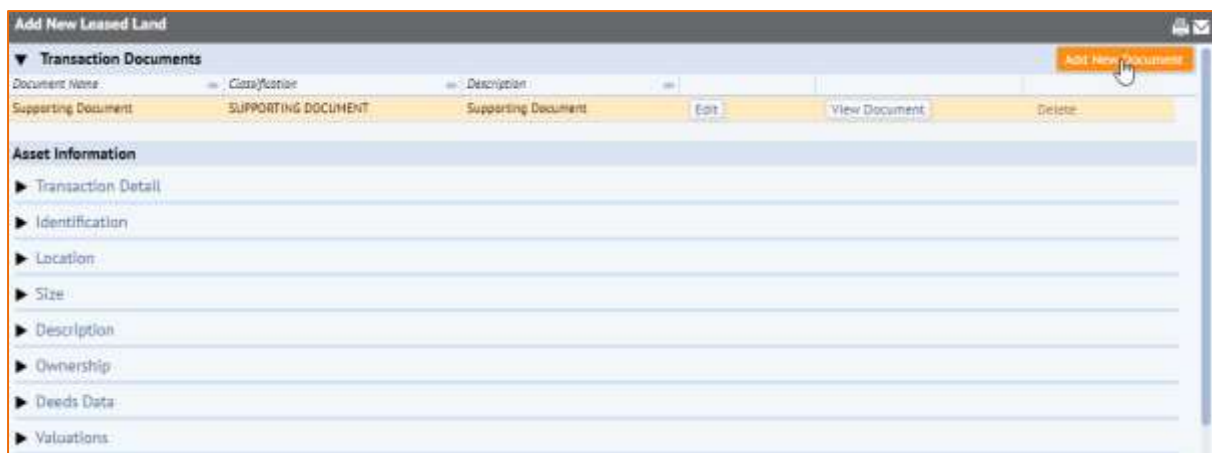


Figure 34: Add New Document

Note: upload any additional documents to the transaction is optional

20. Complete all the relevant information within the **Add New Document** view by typing the Document name, Choose the classification by click on the select value icon then type in the description.

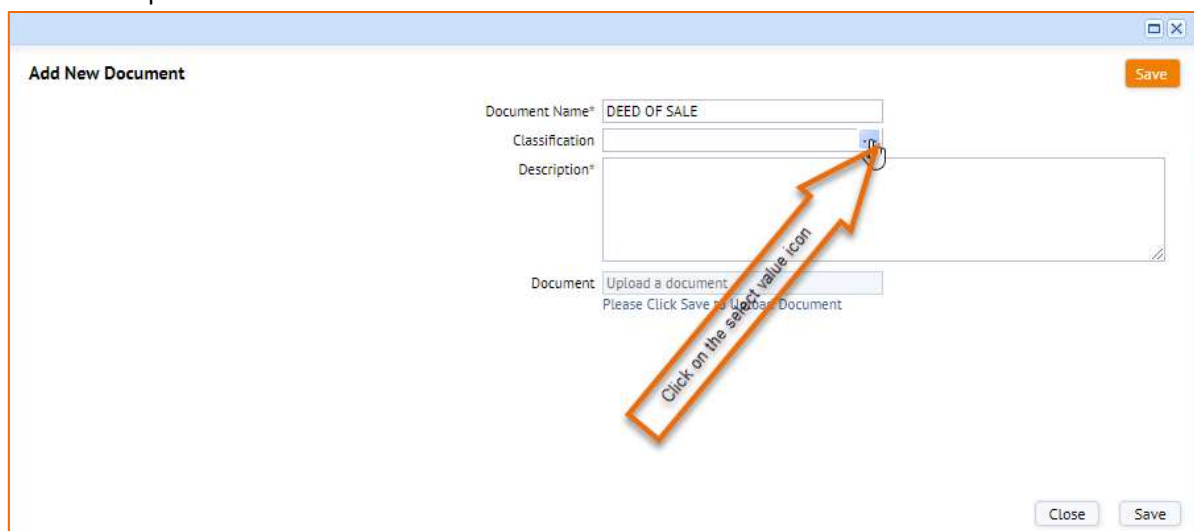


Figure 35: Select Value

21. After selecting the select value icon the system will take you to the Select Value -Classification, Choose the classification.

Store Value	Display Value
Aktex	Aktex
Certificate of Completion	Certificate of Completion
Consultant Fees Documents	Consultant Fees Documents
Contract	Contract
Conveyancer Invoice	Conveyancer Invoice
Deed of Sale	Deed of Sale
Expropriation Approval	Expropriation Approval
Fair/Market Value	Fair/Market Value
Item 28(1) Certificate	Item 28(1) Certificate
Section 42 Transfer	Section 42 Transfer
SG Diagram	SG Diagram
Statement Final Account	Statement Final Account
TITLE DEED	Title Deed

Figure 36: Classification

22. After filling in the fields click Save

Add New Document

Document Name* DEED OF SALE

Classification DEED OF SALE

Description* DEED OF SALE

Document Upload a document
Please Click Save to Upload Document

Close Save

Figure 37: Save Button

23. Click on the **Check in New Document** icon to upload a document.

Add New Document

Document Name* DEED OF SALE

Classification DEED OF SALE

Description* DEED OF SALE

Document Upload a document
Please Click Save to Upload Document

Check In New Document

Save

Close Save

Figure 38: Check in New Document

Check In New Document

Document File

Choose file No file chosen

Description

Set Lock Status

☐ Locked ☒ Unlocked

OK Cancel

Figure 39: Choose File

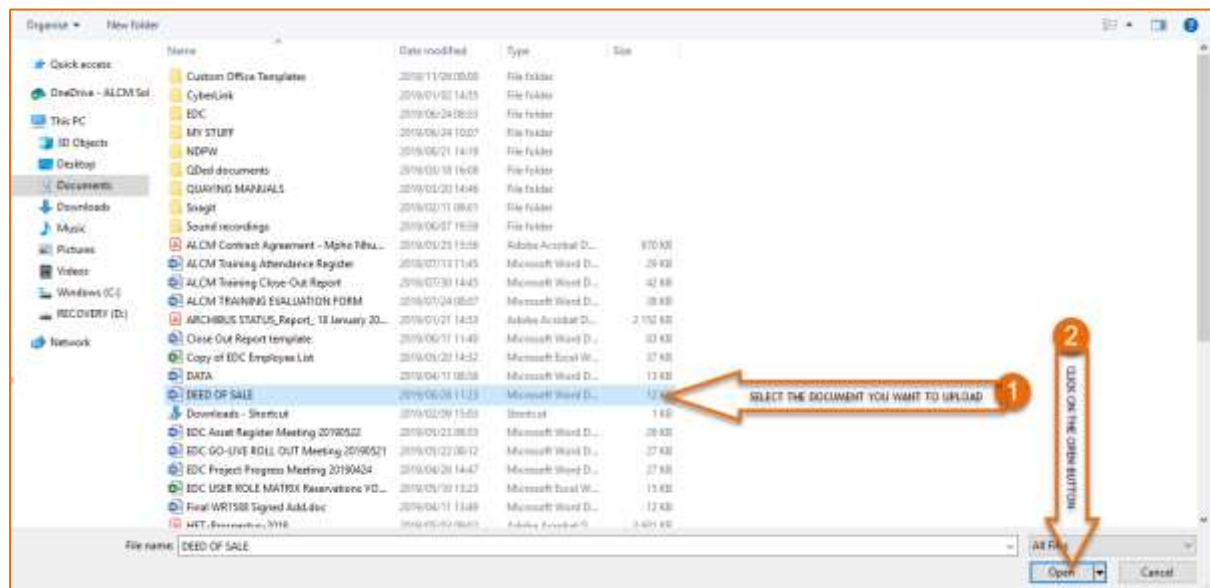


Figure 40: Choose File

24. Once the document has been uploaded click **save**.

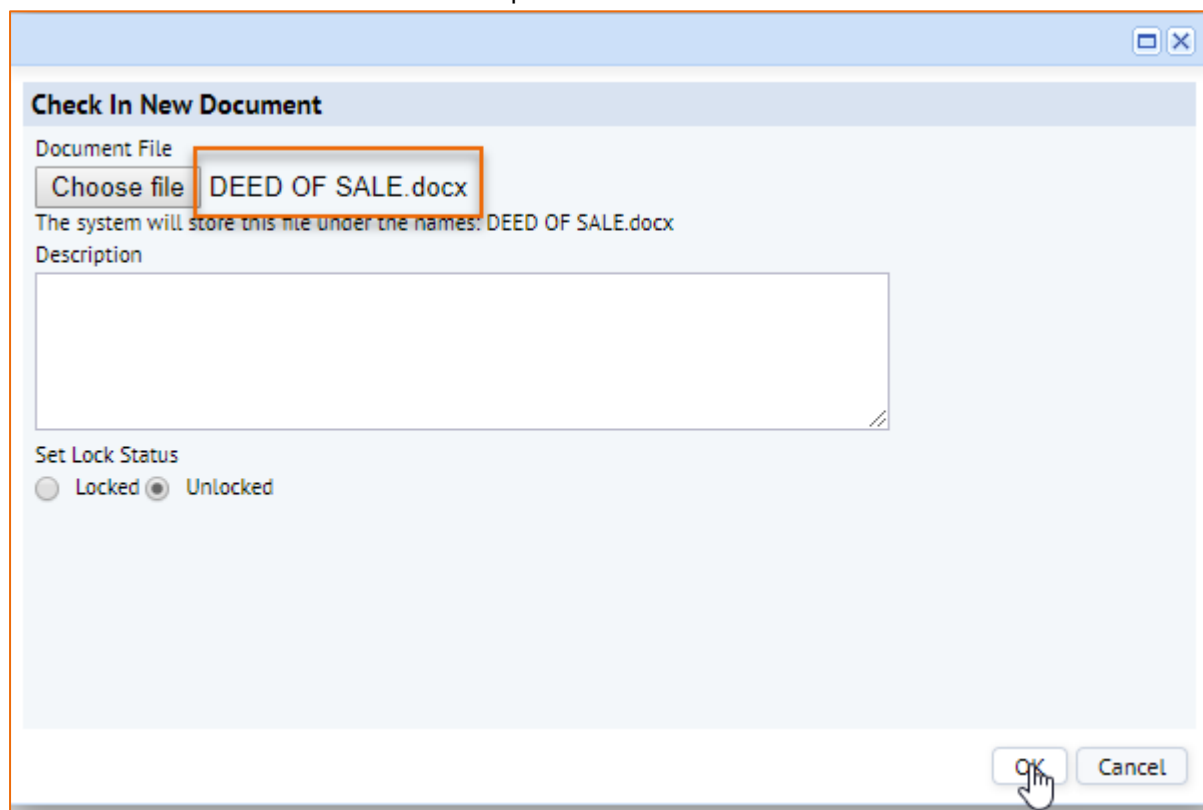


Figure 41: Ok Button

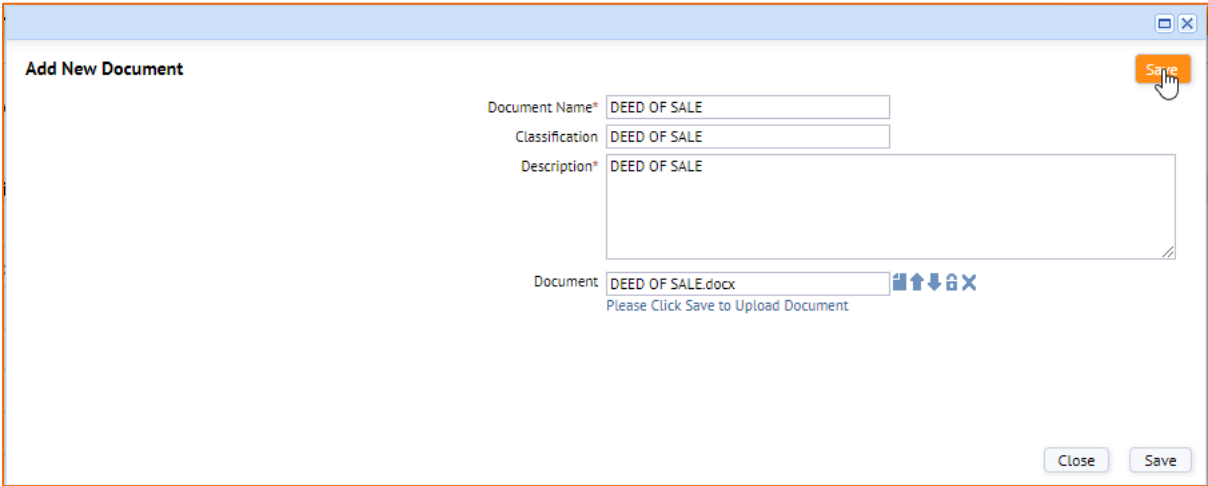


Figure 42: Save Button

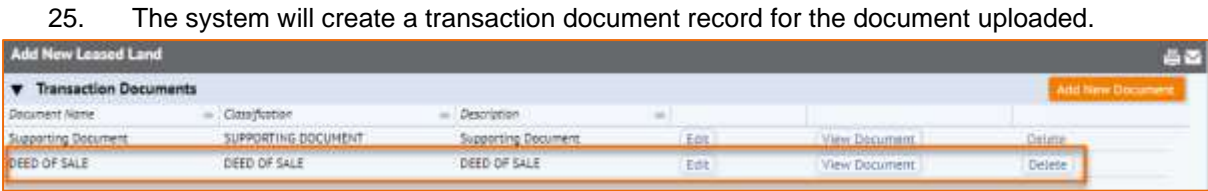


Figure 43: Transaction Documents

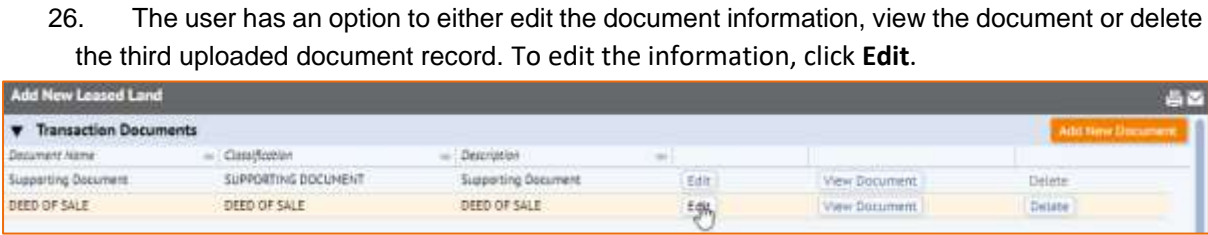


Figure 44: Edit Button

27. The **Check in New Document** icon will display. To edit the upload document, click on the icon.

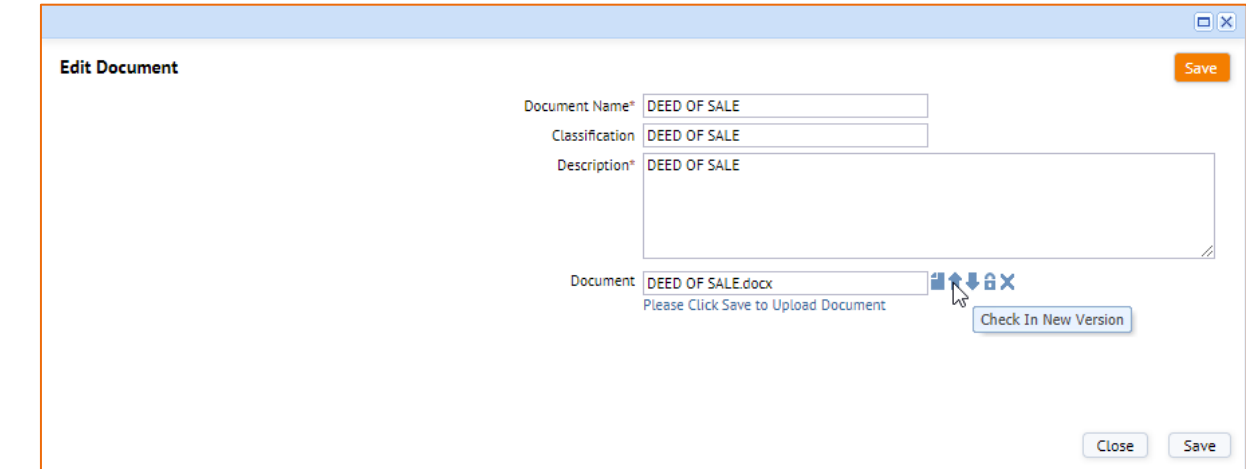


Figure 45: Check in New Version

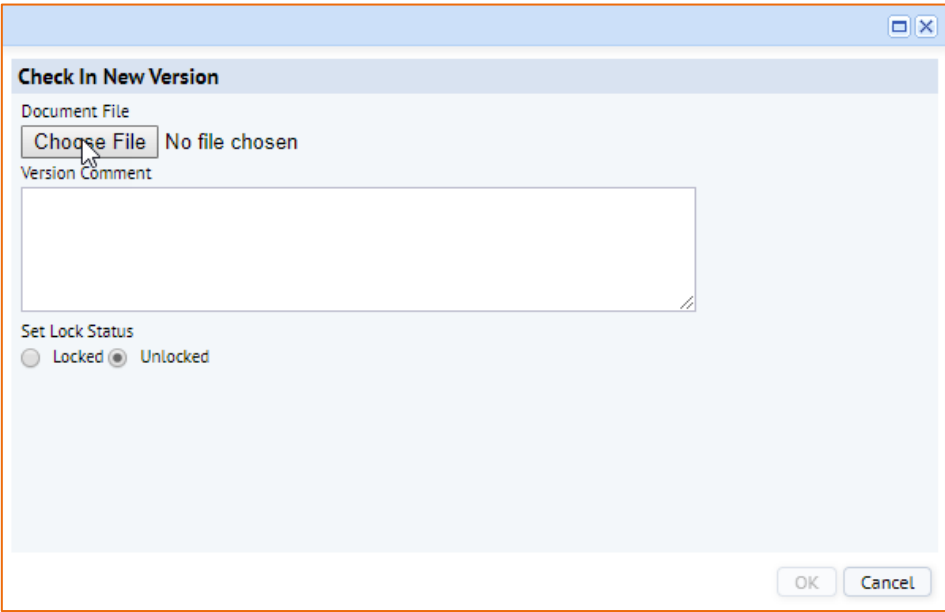


Figure 46: Choose File

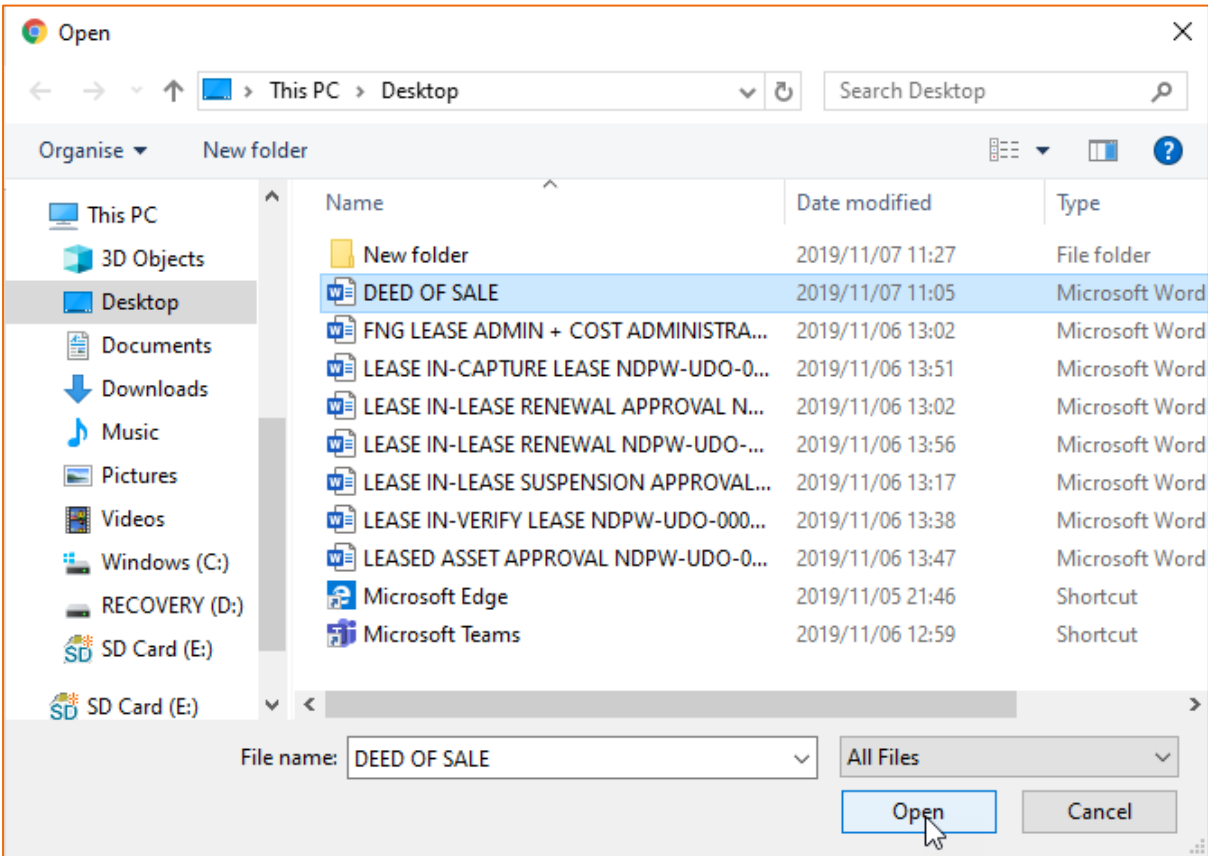


Figure 47: Choose File

28. Once the document has been uploaded click **save**.

Check In New Version

Document File
Choose File DEED OF SALE.docx

The system will store this file under the name: DEED OF SALE.docx

Version Comment

Set Lock Status
☐ Locked ☒ Unlocked

Ok Cancel

Figure 48: Ok Button

Edit Document

Document Name* DEED OF SALE

Classification DEED OF SALE

Description* DEED OF SALE

Document DEED OF SALE.docx Please Click Save to Upload Document

Save

Close Save

Figure 49: Save Button

29. To view the document, click **View Document**

Add New Leased Land

Transaction Documents

Document Name	Classification	Description	Edit	View Document	Delete
Supporting Document	SUPPORTING DOCUMENT	Supporting Document	Edit	View Document	Delete
DEED OF SALE	DEED OF SALE	DEED OF SALE	Edit	View Document	Delete

Add New Document

Figure 50: View Document

30. Once View Document is selected the system will generate the uploaded document. Click on the link to open the document.

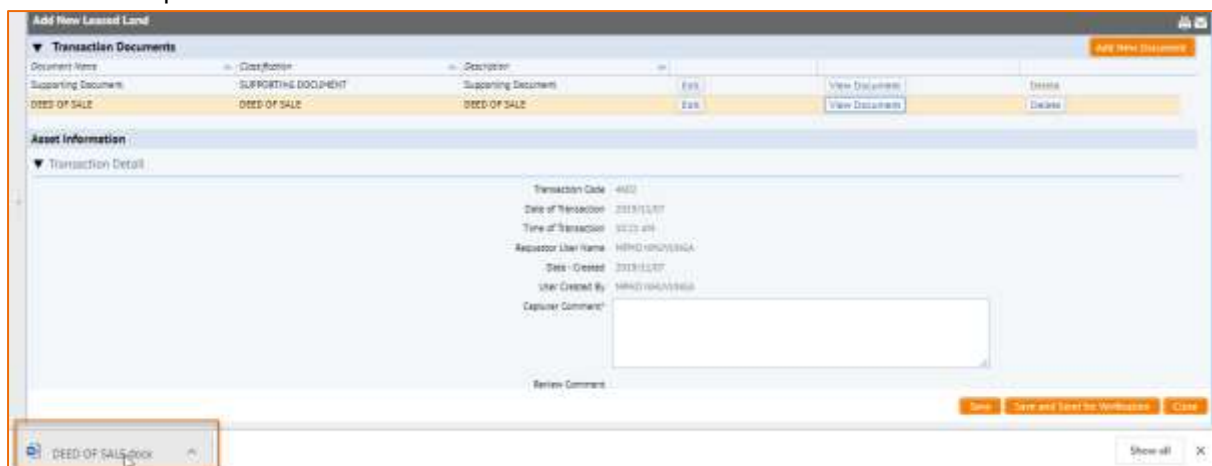


Figure 51: Transaction Documents

31. To delete the record, click **Delete** and the record will be removed from the transaction records.

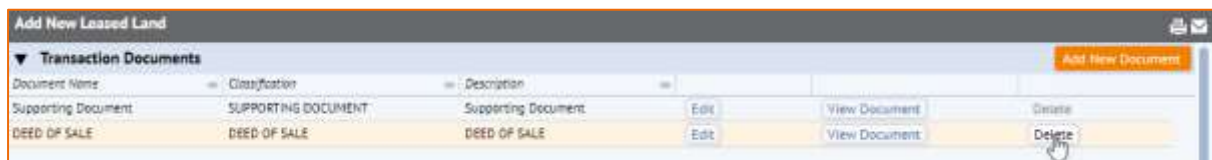


Figure 52: Delete Button

32. Once you click the “delete” button, the system will prompt you to confirm that the uploaded document should be deleted. Click Yes to proceed

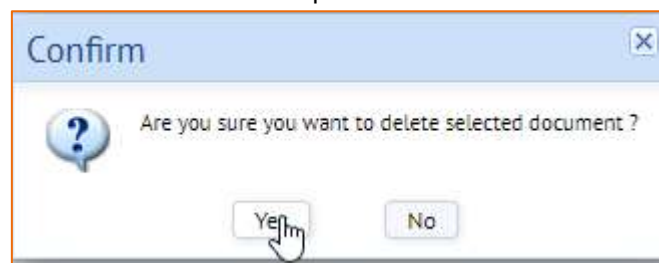


Figure 53: Delete Confirmation

33. Click close button to close the leased asset transaction.

The screenshot shows the 'Add New Leased Land' form. At the top right, there is an 'Add New Document' button. Below the 'Transaction Documents' section, there is a table with columns: Document Name, Classification, Description, Edit, View Document, and Delete. The table contains two rows: 'Supporting Document' and 'DEED OF SALE'. Below the table, there is an 'Asset Information' section with expandable fields: Transaction Detail, Identification, Location, Size, Description, Ownership, Deeds Data, and Valuations. At the bottom, there is a 'Change History' section with fields for User Created, Date Created, Time Created, User Requestor, Date - Created, and Date Requested. At the bottom right, there are three buttons: 'Save', 'Save and Send for Verification', and 'Close'. A mouse cursor is pointing at the 'Close' button.

Figure 54: Close Button

34. Once you click the "Close" button, the system will prompt you to confirm that the asset transaction should be closed without saving. Click OK to proceed

The screenshot shows a confirmation dialog box. The text inside the box reads: 'worx4uarch-uat.pmtte.org.za says' followed by 'Are you sure you want to close without saving?'. At the bottom right, there are two buttons: 'OK' and 'Cancel'. A mouse cursor is pointing at the 'OK' button.

Figure 55: Close Confirmation

35. To save and continue later, click Save

The screenshot shows the 'Add New Leased Land' form, identical to Figure 54. At the bottom right, there are three buttons: 'Save', 'Save and Send for Verification', and 'Close'. A mouse cursor is pointing at the 'Save' button.

Figure 56: Save Button

36. Once you click the “Save” button, the system will prompt you to confirm that the asset transaction should be saved. Click OK to proceed

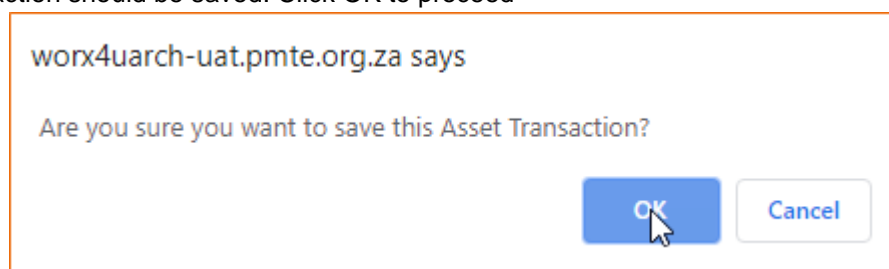


Figure 57: Save Confirmation

37. Once the mandatory document/s has/have been saved the transaction can be sent for verification. To proceed click **Save and Send for Verification**.

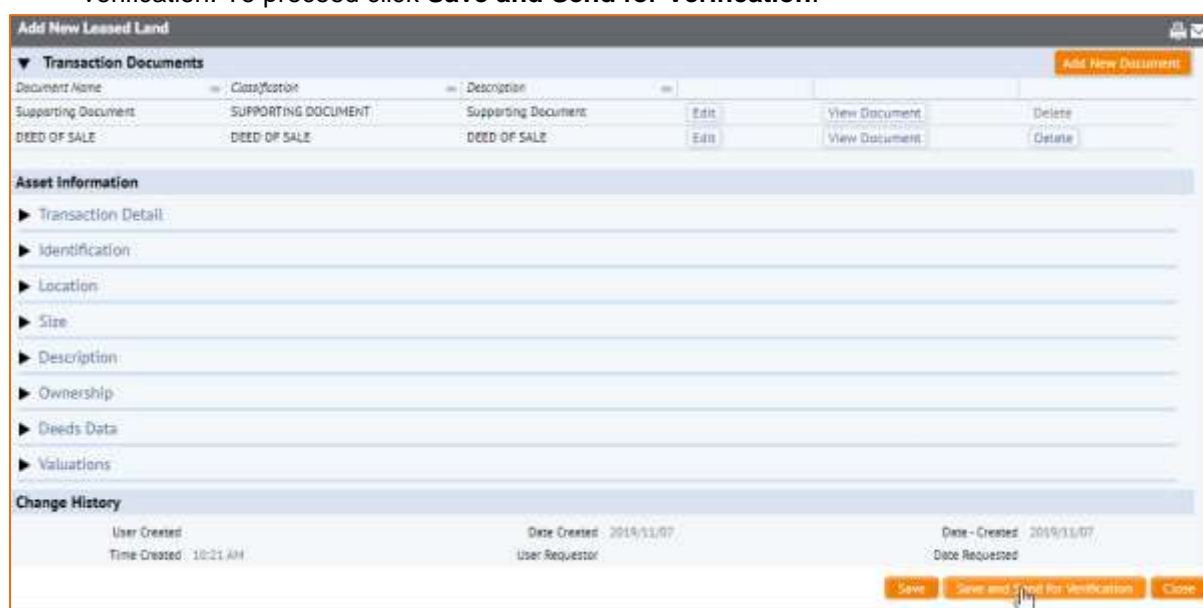


Figure 58: Save and Send for Verification

38. Once you click the “Save and Send for Verification button, the system will prompt you to confirm to route the asset transaction for Verification. Click OK to proceed.

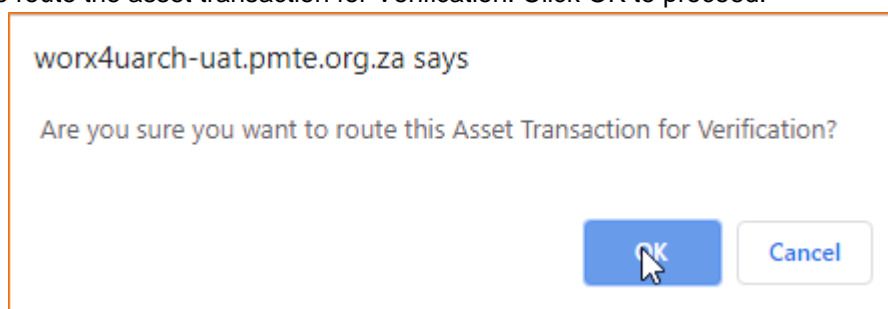


Figure 59: Route for Verification Confirmation

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

THE END!