

WORX4U ARCHIBUS IMPLEMENTATION:

LEASE-IN: SUSPEND LEASE

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REPUBLIC OF SOUTH AFRICA



WORX4U



DOCUMENT CONTROL SHEET

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CLIENT DISTRIBUTION AND COMMUNICATION

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

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1. INTRODUCTION

This user guide provides details about how to Suspend Lease. The user will select a specific Lease to be suspended. Once selected, the system will open the GeneralLease Information view displaying the information of the lease. The system will open the Edit Lease form. User will fill in the form and add mandatory documents and the lease will be routed for Verification.

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:

- Suspend Lease

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This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision.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

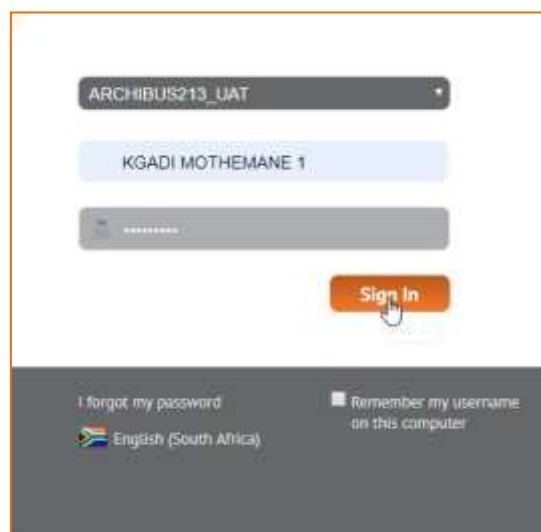


Figure 2: Sign - In

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

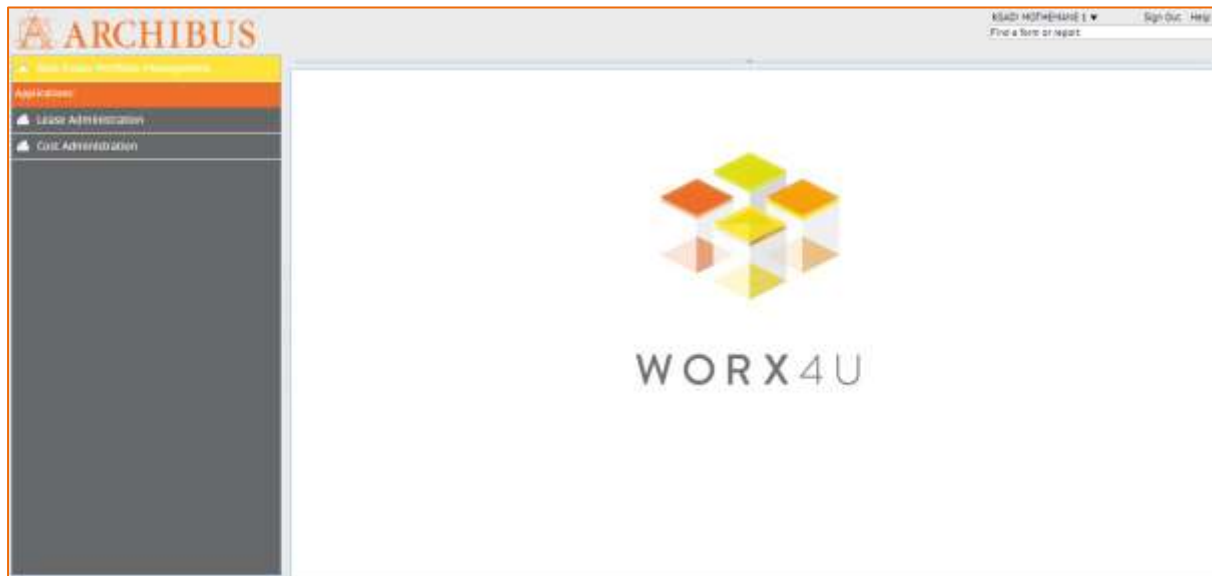


Figure 3: Landing Page

General Rules:

- *This function can only be performed by the capturer.*
- *Fields marked with an asterisk * are compulsory*
- *Suspension date can be backdated*

4. SUSPEND LEASE

To access the Lease Portfolio Console task,

1. Select Real Estate Portfolio Management | Lease Administration | Capture Lease | Lease Portfolio Console

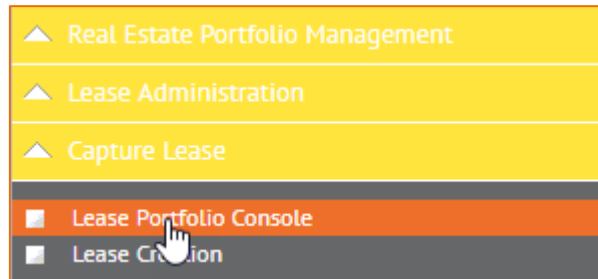


Figure 4: Process Navigator

2. In the Lease Portfolio Console, the users will utilize the filter options to select a specific Lease to be suspended

Lease Portfolio Console

Select Lease: Lease Summary

Leases

Landlord Name: BUILDING COUNTRY: TOWN: Show: LEASE: More Clear Filter

Leases

Lease Code: 1(1) 2(1) 3(1) 4(1) 5(1) 6(1) 7(1) 8(1) 9(1) 10(1)

Lease Code	Description	Region/Office	Property File Reference	PHS Code	Landlord Code	Landlord Name	Tenant Code	Tenant Name
12969415	land test	NEL	1234/1234/1234	2P0000001234	WORLD - INC	PUR00000	1234	World
12969416	land test	NEL	1234/1234/1234	2P0000001235	World Electrical Contractors	PUR00000	1234	World
12969417	Option 2 test	NEL	1100/1100/000	2P0000001236	138 Victoria Embankment Co.	PUR00000	1234	Human Settlements
12969418	IDE	NEL	0000/0000/000	2P0000001237	Wachovia Security Services Inc.	PUR00000	1234	South African Police Service
12969419	IMPERIAL BUILDING	NEL	7412/0025/940	2P0000001238	Lee Davis Systems & Hardware	PUR00000	1234	South African Police Service
12969420	IMPERIAL BUILDING	NEL	8516/0000/110	2P0000001239	Black Cloud	PUR00000	1234	South African Police Service
12969421	IMPERIAL BUILDING	NEL	0800/0024/166	2P0000001240	Hi-Tech Security	PUR00000	1234	South African Police Service
12969422	IMPERIAL BUILDING	NEL	265/018	2P0000001241	Verity Systems International	PUR00000	1234	South African Police Service
12969423	IDE	NEL	1010/1010/101	2P0000001242	01BLACKHEATH INVESTMENTS PTY	2P0000001243	1234	Voicecom SA
12969424	TECHN	NEL	1010/1010/101	2P0000001244	2pg Technologies Co	PUR00000	1234	Energy
12969425	Automated dry run test 5	NEL	1234/1234/1234	2P0000001245	D & H Building Trust	PUR00000	1234	Social Development
12969426	Option 2 test	NEL	1100/1100/000	2P0000001246	138 Victoria Embankment Co.	PUR00000	1234	Human Settlements
12969427	Workflow testing 1	NEL	1100/1100/000	2P0000001247	2421 Te B Project 24	PUR00000	1234	Small Business Devlop

Figure 5: Lease Portfolio Console

3. The Filter enables you to search by Landlord Name, Building, Country, Town or by a specific Lease Code

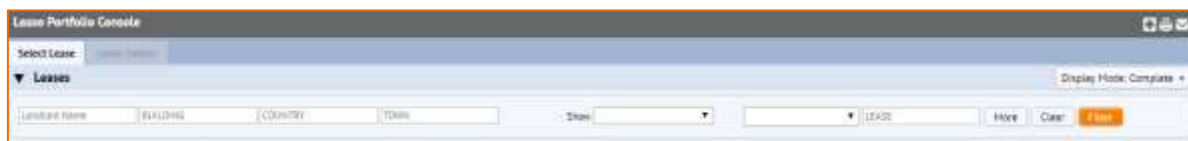


Figure 6: Filter Options

- Click More to expand the filter options. The user can filter Landlord Name, Building, Country, by Lease Code etc.

Figure 7: Expanded Filter

- In the **Lease Code** filter field type in the Lease code that needs to be suspended, and then select the **filter option**

Figure 8: Expandable Filter

- Within the Leases panel the system will show the filtered lease. Click on the filtered lease code to open the lease details.

Lease Code	Description	Regional Office	Property File Reference	PINT Code	Landlord Code	Landlord Name	Tenant Code	Tenant Name	Asset Code	Lease Code
123456789	1800 test	HLS	1234/1344/234	2P0000001e24	123456789	123456789	PUB0000	12345	12345	123456789

Figure 9: Leases

- Once selected, the system will open the GeneralLease Information view displaying the information of the lease. Select the **Set Editable** button. Take note that before the **Set Editable** option is selected the **Lease Status** is **Active**.

Figure 10: Lease Details

- The system will require confirmation to proceed as any lease information changes will have to be verified and approved before being effected on the lease. To proceed click OK.

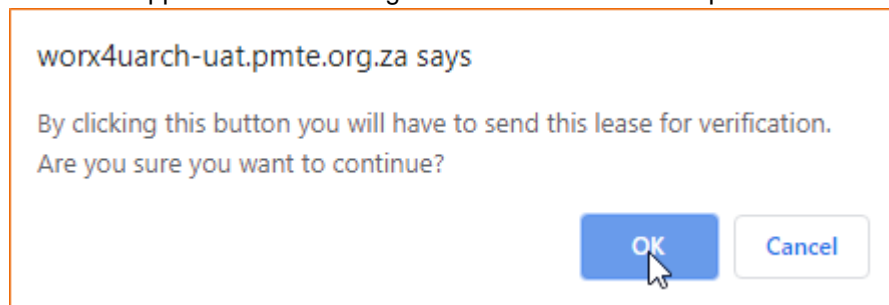


Figure 11: Confirmation Option

- Select the **Edit** button.

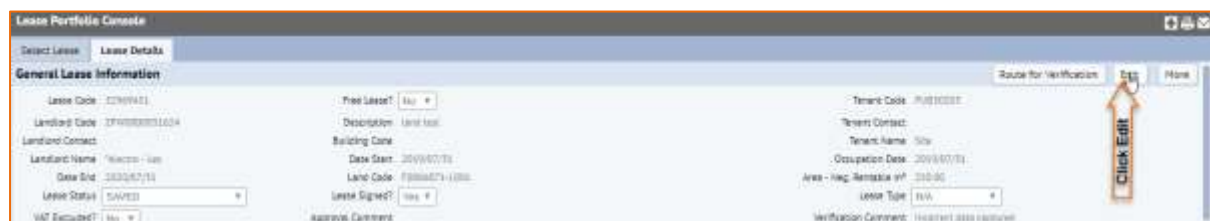


Figure 12: Edit Option

- The system will open the Edit Lease form. In order to suspend the lease, select the **Suspend Lease** button.

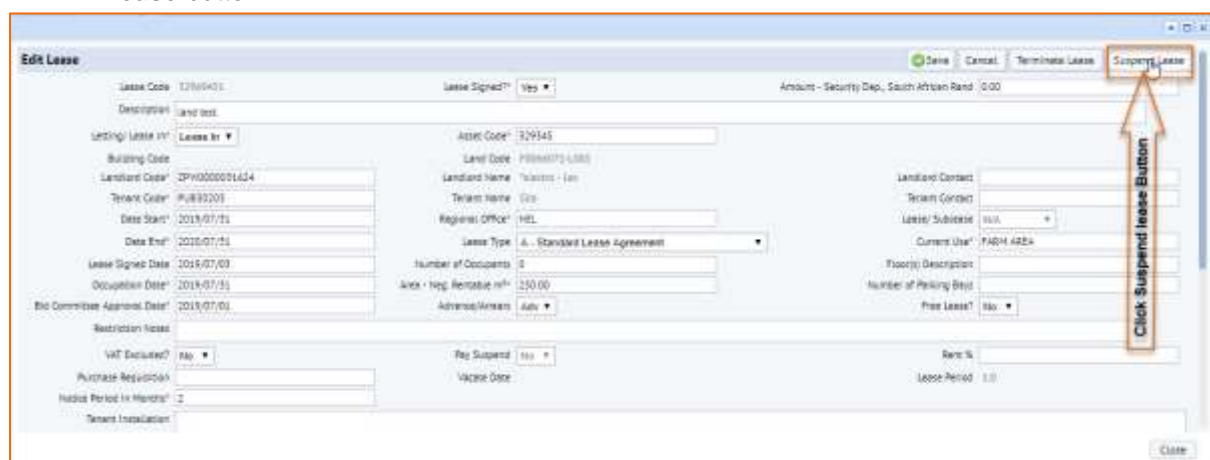


Figure 13: Suspend Lease

Note: The Pay Suspend indicator is set to No before the lease is suspended.

- Once the user selects the Suspend Lease option, the system will require confirmation from the user to proceed with the suspension of the lease. Click **Yes** to proceed.

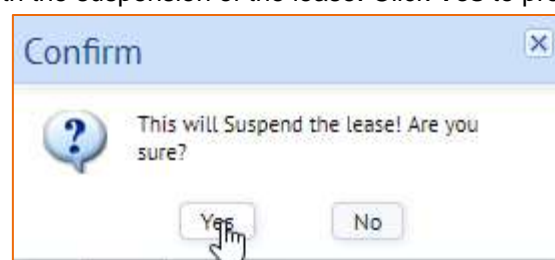
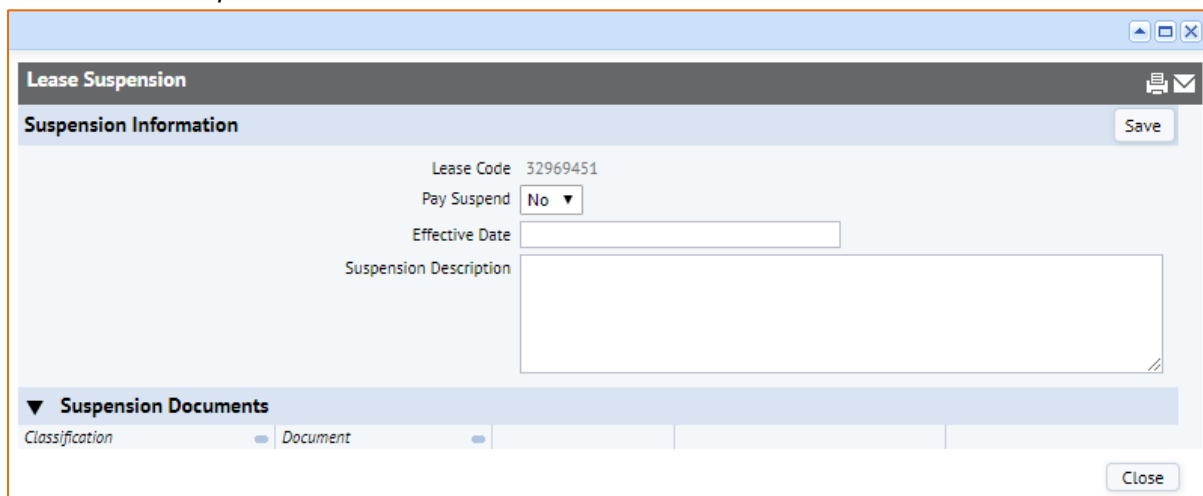


Figure 14: Suspension Confirmation

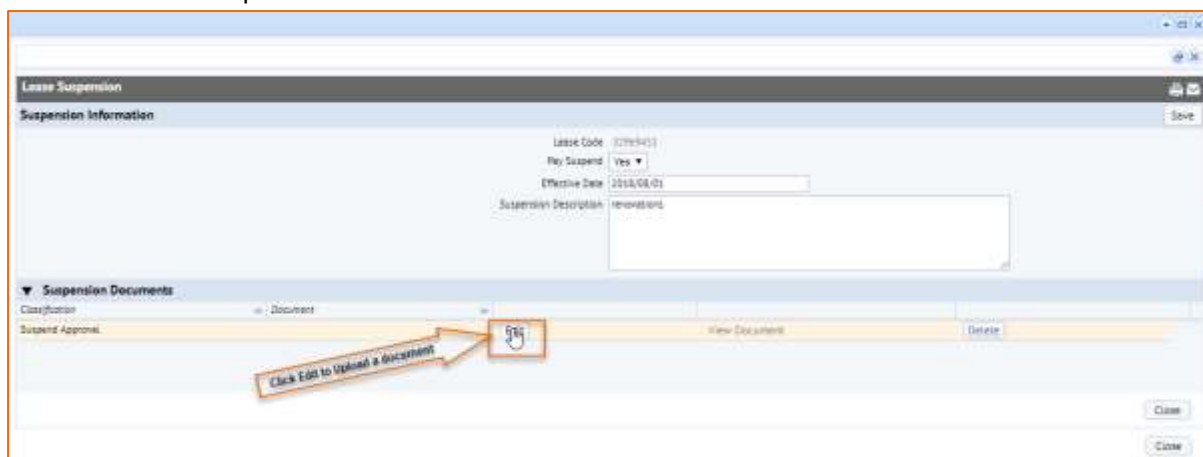
12. Complete all required fields and upload supporting documentation in the Lease Suspension view before the transaction can be saved. The system will auto populate the lease code. Complete the effective date of the suspension and provide a description of the suspension.
Note: Suspension date can be backdated



The screenshot shows the 'Lease Suspension' window. The 'Suspension Information' section contains the following fields: 'Lease Code' (32969451), 'Pay Suspend' (No), 'Effective Date' (empty), and 'Suspension Description' (empty). A 'Save' button is in the top right. Below this is the 'Suspension Documents' section, which has a 'Classification' dropdown set to 'Document'. A 'Close' button is at the bottom right.

Figure 15: Suspension Information

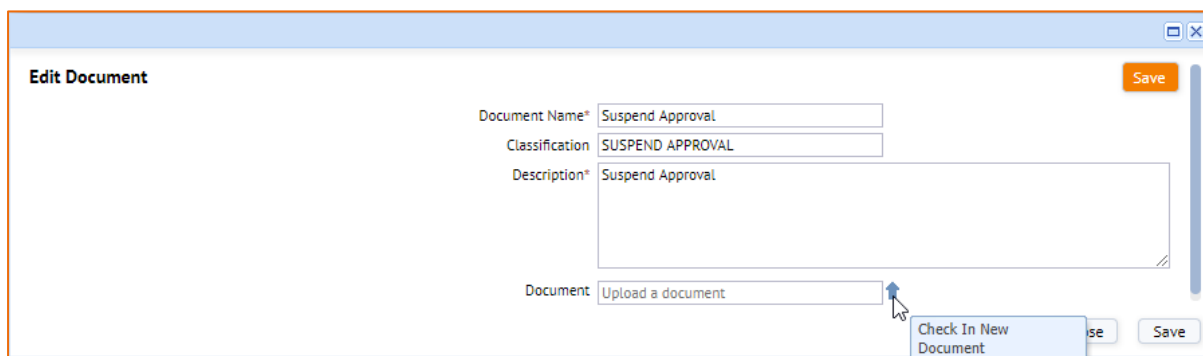
13. To upload the mandatory, Suspend Approval document select Edit in the Suspension Documents panel.



This screenshot is similar to Figure 15 but shows the 'Suspension Documents' panel with a table. The first row is 'Suspend Approval'. An orange arrow points to the 'Edit' button in this row. The 'Suspension Information' section above shows 'Lease Code' (32969451), 'Pay Suspend' (Yes), 'Effective Date' (2018/08/01), and 'Suspension Description' (Renovations). 'Save' and 'Close' buttons are visible.

Figure 16: Edit to Upload Document

14. In the Edit Document view click on the Check in New Document icon.



The screenshot shows the 'Edit Document' window. It contains fields for 'Document Name*' (Suspend Approval), 'Classification' (SUSPEND APPROVAL), and 'Description*' (Suspend Approval). At the bottom, there is a 'Document' field with the text 'Upload a document'. An arrow points to a 'Check In New Document' button located below this field. A 'Save' button is in the top right corner.

Figure 17: Edit Document

15. In the **Check in New Document** view click on Choose File.



Figure 18: Choose File

16. Start by first selecting the document from where it is saved in your computer and then click on the **Open** button.

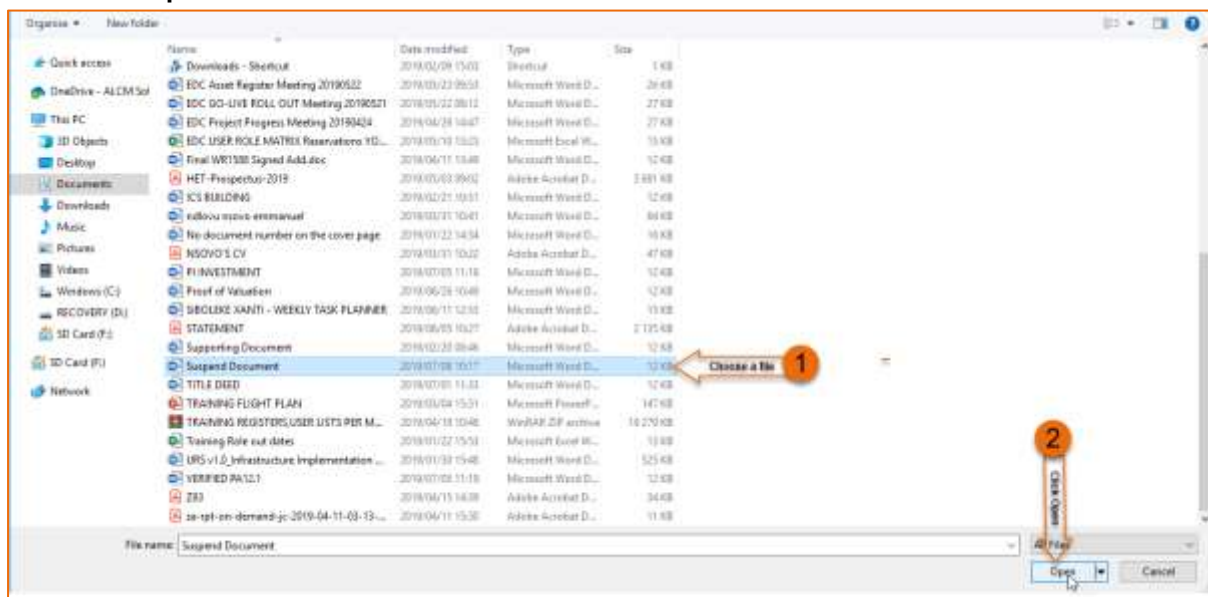


Figure 19: Choose File

17. The name of the uploaded document will be displayed next to the **Choose File** button as illustrated below. Click **OK** to proceed,

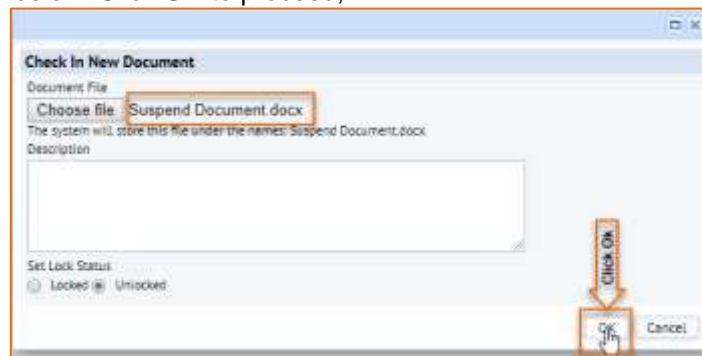


Figure 20: Ok Button

18. Click on the Save button in the **Edit Document** view.

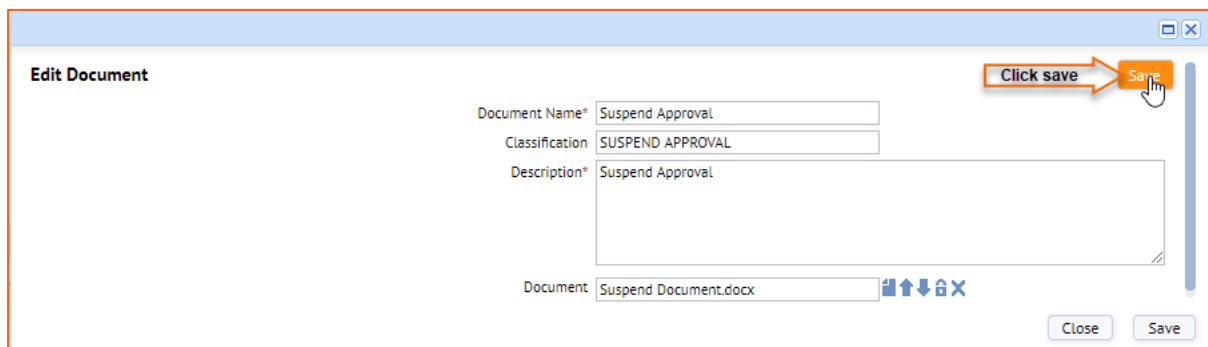


Figure 20: Save

19. User need to click Save to save the Suspension Information.

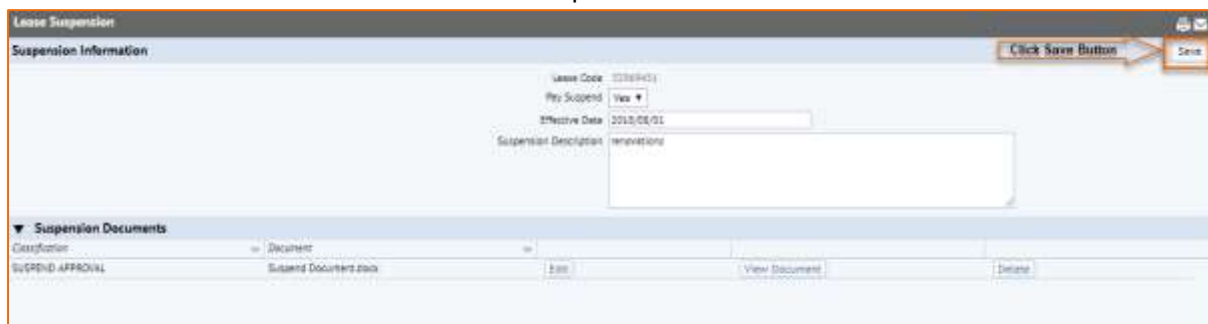


Figure 21: Save

20. Once the suspension information has been saved complete a comment in the **Comments** field then select the save option on the edit lease form

Figure 22: Save

21. Once all information has been saved, the status of the lease will be changed to **Saved** and the suspension transaction can be routed for verification by clicking on the **Route for Verification** button.

Figure 23: Route for Verification

22. The system will display a confirmation message to route the transaction for verification. Click **Yes**.

Figure 24: Route for Verification

23. Once the transaction has been routed for verification the status of the lease transaction will change to **Sent for Verification**

Figure 25: Status

You have now reached the end of the manual and the lease transaction will move to the verification stage.

THE END!