

WORX4U ARCHIBUS IMPLEMENTATION:

LEASE-IN: LEASE RENEWAL VERIFICATION

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WORX4U



DOCUMENT CONTROL SHEET

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CLIENT DISTRIBUTION AND COMMUNICATION

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1. INTRODUCTION

This user guide provides details about how to verify a lease renewal transaction

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:

- Verify Lease Renewal Transactions

The Lease verification view displays all the lease transactions that are currently pending verification. The verifier will be able to assess the asset details captured with the matching mandatory document. Once a full assessment has been undertaken to ensure that all the mandatory information has been captured the verifier will either route for approval the lease renewal 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This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision.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:

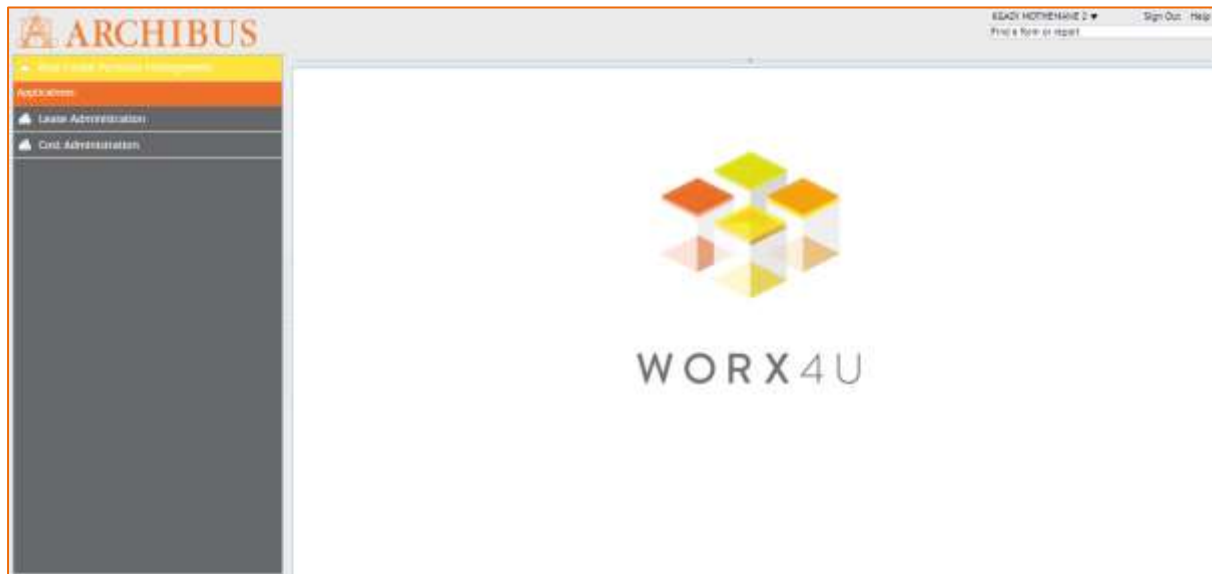


Figure 3: Landing Page

General Rules:

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

4. VERIFY LEASE

To access the Lease Verification,

- 1. Select **Lease Administration | Verify Lease | Lease Verification**

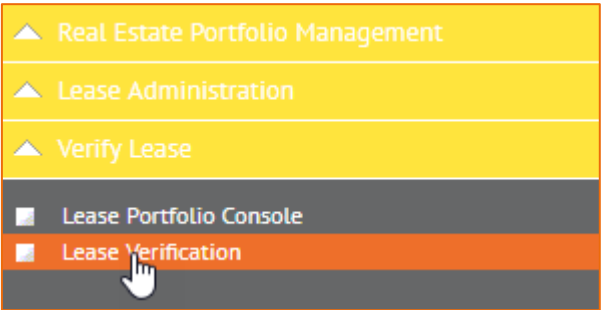


Figure 4: Process Navigator

- 2. The user selects the Lease transaction to open the general lease information to be verified.

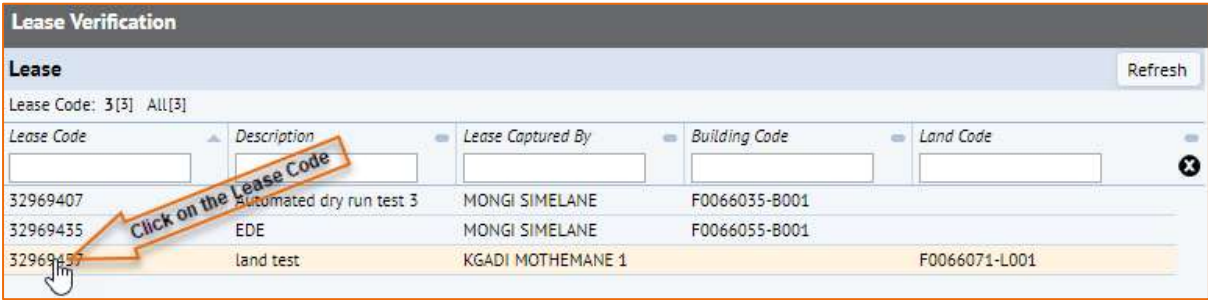


Figure 5: Lease List

- 3. Once the information has been verified the lease will have to be routed for Approval.



Figure 6: Confirm Route for Approval

- The system will require confirmation to proceed with routing the lease for Approval. Confirm by clicking on **Yes**

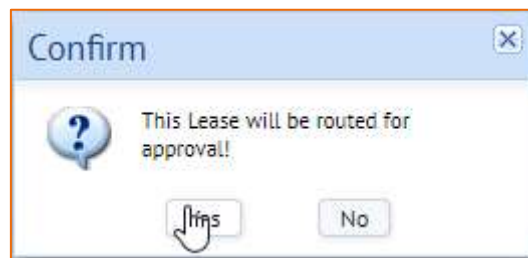


Figure 7: Confirm Route for Approval

- The system will prompt Transaction sent for Approval.

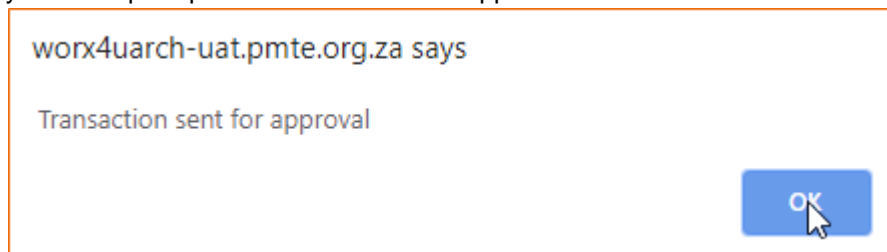


Figure 8: Sent for Approval Confirmation

- Once the user has confirmed the transaction, the status of the Lease will change to Sent for Approval



Figure 9: General Lease Information – Lease Status

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

The screenshot shows the 'Lease Verification' form. At the top right, there are three buttons: 'Reject' (red), 'Send for Review' (yellow), and 'Send for Approval' (green). An orange arrow points to the 'Reject' button with the text 'Click Reject Button'. Below the buttons, the form contains various fields for lease information, including Lease Code, Description, Building Code, Date Start, Land Code, Tenant Code, Tenant Contact, Tenant Name, Occupation Date, Area - Reg. Rentable sqf, Effective Date, Landlord Code, Landlord Contact, Landlord Name, Date End, Free Lease, and Lease Status. A 'Verification Comment' field is highlighted with an orange box and contains the text 'Incorrect data captured'.

Figure 10: Reject Option

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



Figure 11: Reject

9. If Send for Review is selected, the transaction will be routed to the Capturer for review. If the information is reviewed and the verifier is not satisfied with the data captured and needs the information to be corrected, the asset can be sent for review. Before sending the asset for review ensure that sufficient understandable comments are added for the capturer in the open Action Comment field then Click **Send for Review**.

The screenshot shows the 'Lease Verification' form. At the top right, there are three buttons: 'Reject' (red), 'Send for Review' (yellow), and 'Send for Approval' (green). An orange arrow points to the 'Send for Review' button with the text 'Click Send for Review'. Below the buttons, the form contains various fields for lease information, including Lease Code, Description, Building Code, Date Start, Land Code, Tenant Code, Tenant Contact, Tenant Name, Occupation Date, Area - Reg. Rentable sqf, Effective Date, Landlord Code, Landlord Contact, Landlord Name, Date End, Free Lease, and Lease Status. A 'Verification Comment' field is highlighted with an orange box and contains the text 'Please select the correct Tenant name'.

Figure 12: Send for Review Option

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

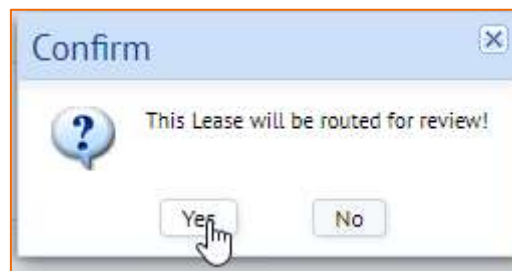


Figure 13: Route for Review

Note: *Reject – If a 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 be archived.*

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

You have now reached the end of the manual and the lease transaction will be awaiting approval.

THE END!