

# WORX4U ARCHIBUS IMPLEMENTATION

## LEASE-IN: LEASED ASSET VERIFICATION

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**public works**

Department:  
Public Works  
**REPUBLIC OF SOUTH AFRICA**



**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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	NDPW	
	NDPW	
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## APPROVAL & SIGN OFF

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This Training Manual covers ARCHIBUS v21.3 and subsequent versions unless this document is superseded by a later revision.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

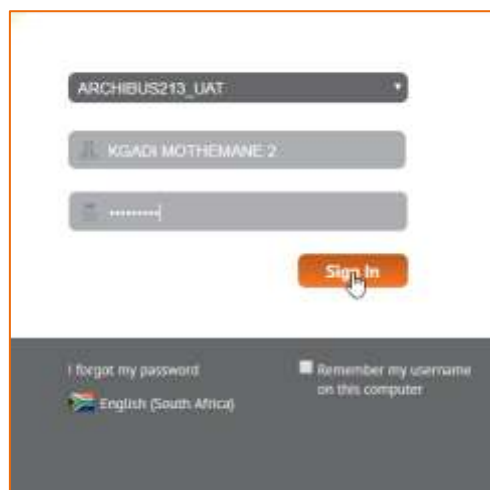
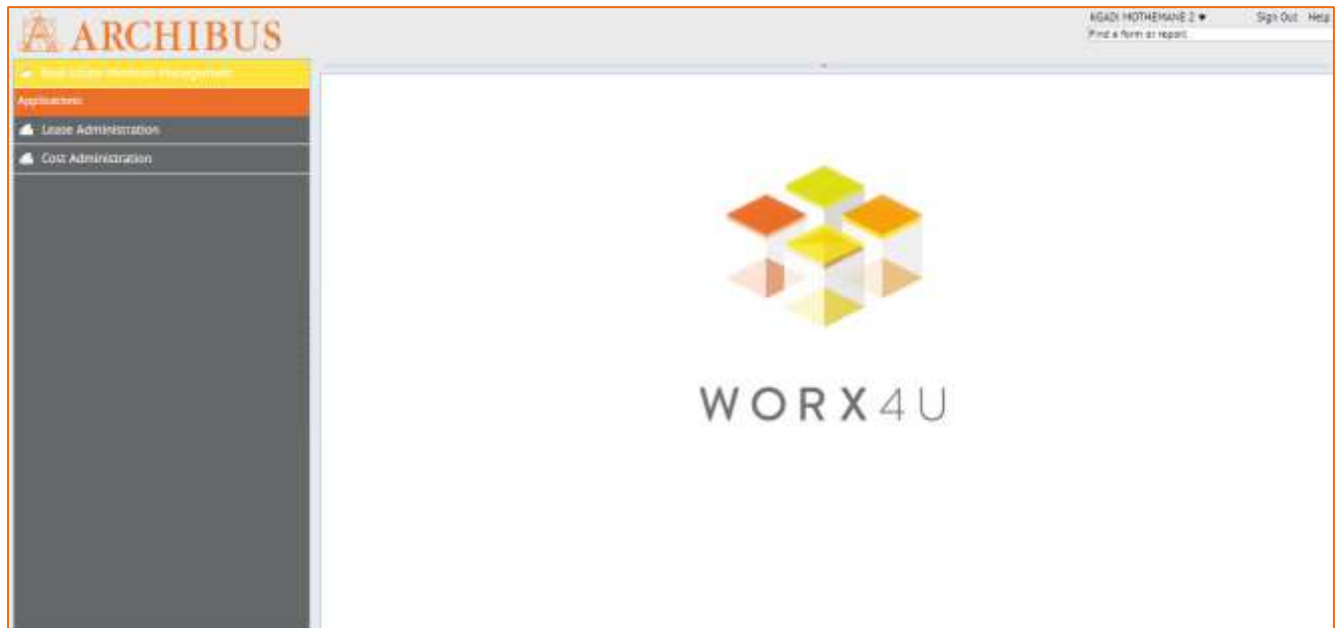


Figure 2: Sign-In

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**

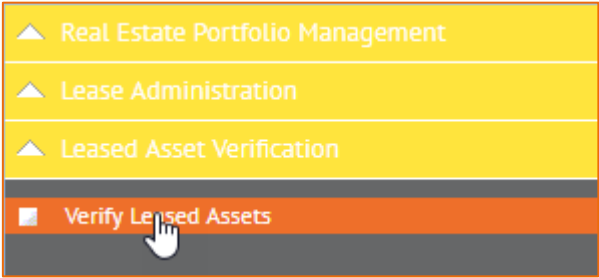


Figure 4: Process Navigator

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

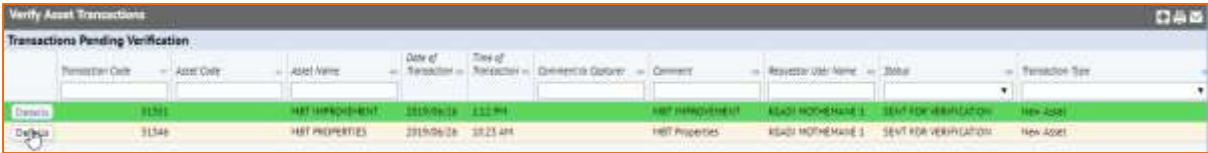


Figure 5: Transactions Pending Verification

- 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



**Land Transaction Detail Information**

**Identification**

Asset Name	HST PROPERTIES
Asset Class	IT
Asset Status	
Asset Type	LAND
Land Category	EST
Est Number	140
Parcel Number	
Land Remainder	
Farm Name	
Farm Number	
Surveyor General Diagram Number	
UP Code	7044041100004152404
Historic Asset Number	
Property File Reference	1234/0544/014
Form/Order	
Asset Description	

**Location**

Town	CARLETON
Local Municipality	HF102
Local Municipality Name	Chief Albert Luthuli
District Municipality	D100
District Municipality Name	West Midlands
Region Code	HE
Province Code	HE
Country Code	ZA
Suburb	
Township	
Pincode	
Street Number	
Street Name	
Street Type	
Postal Code	
Latitude	19.0000000
Longitude	28.0000000

Figure 7: Land Transaction Detail Information

**Land Transaction Detail Information**

**Description**

Extent	1000.000
Extent Unit	SQM
Accommodation Type	FARM AREA
Intended Asset Use	AGRICULTURE/FARMING
Current Use	AGRICULTURE/FARMING
Zoning Type	AGRICULTURE

**Ownership**

Ownership Status	OWNED
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**Deeds Data**

Deed Description	
Deed Number	
Deeds Office	Freehold

**Valuations**

Value - Market Valuation	
Date Market Value Assessed	
Value - Municipal Valuation	2000000.00
Effective Date Municipal Valuation	2019/06/04

Figure 8: Land Transaction Detail Information

- 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.

**Change History**

Action	Date	Time	User
Date Created	2019/06/04	10:23 AM	AGRICULTURE/FARMING
Date Verified			
Date Review			
Date Approved			
Date Rejected			
Comments to Verifier			
Comments to Approver			
Comments to Capturer			
Rejection Comments			

Figure 9: Land Transaction Detail Information

- 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**.

**Details for Transaction: 51344**

**Transaction General Information**

Transaction Code	51344
Date of Transaction	2019/06/04
Time of Transaction	10:23 AM
Requester User Name	AGRICULTURE/FARMING
Comment to Verifier	
Comment	HST Properties
Action Comment	
Transaction Type	INITIAL
Status	SENT FOR VERIFICATION

**Buttons:** Send for Approval, Send for Review, Reject

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**.

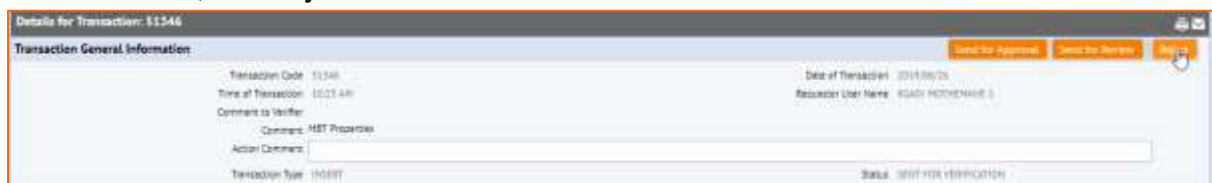


Figure 12: Reject

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

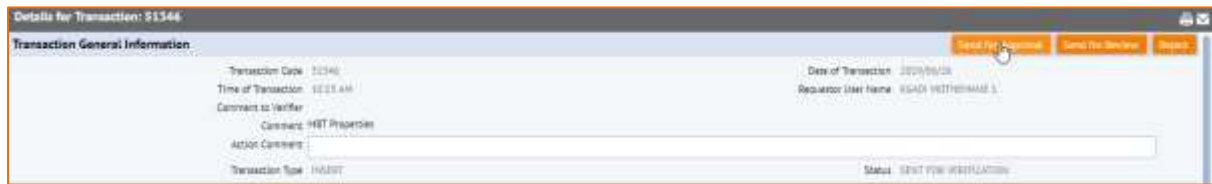


Figure 13: Please add a comment

**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.

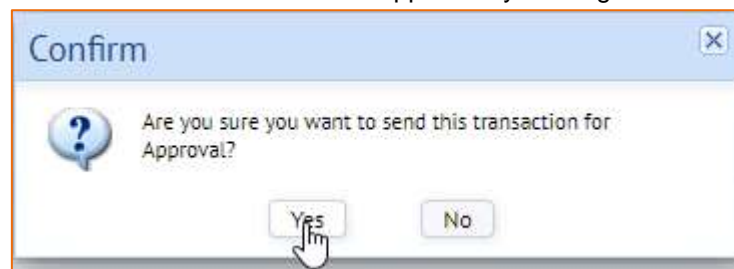
*Send for Review* – Asset transaction is missing some information and will be sent back to the capturer to fix.

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

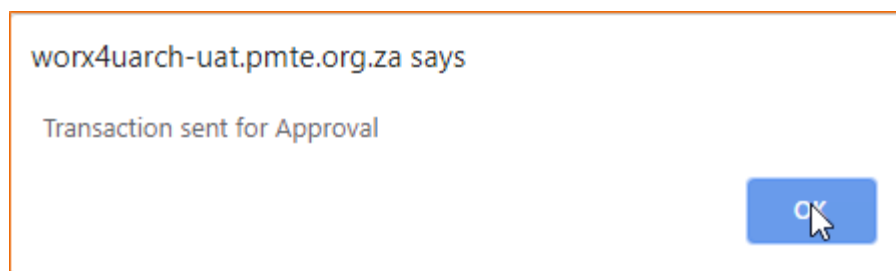


**Figure 14: Send for Approval**

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!**