ERP Functional USER MANUAL

Training Manual

Wayleave Applicant

mSCOA ERP

mSCOA COMPLIANT
STANDARD CHART OF ACCOUNTS
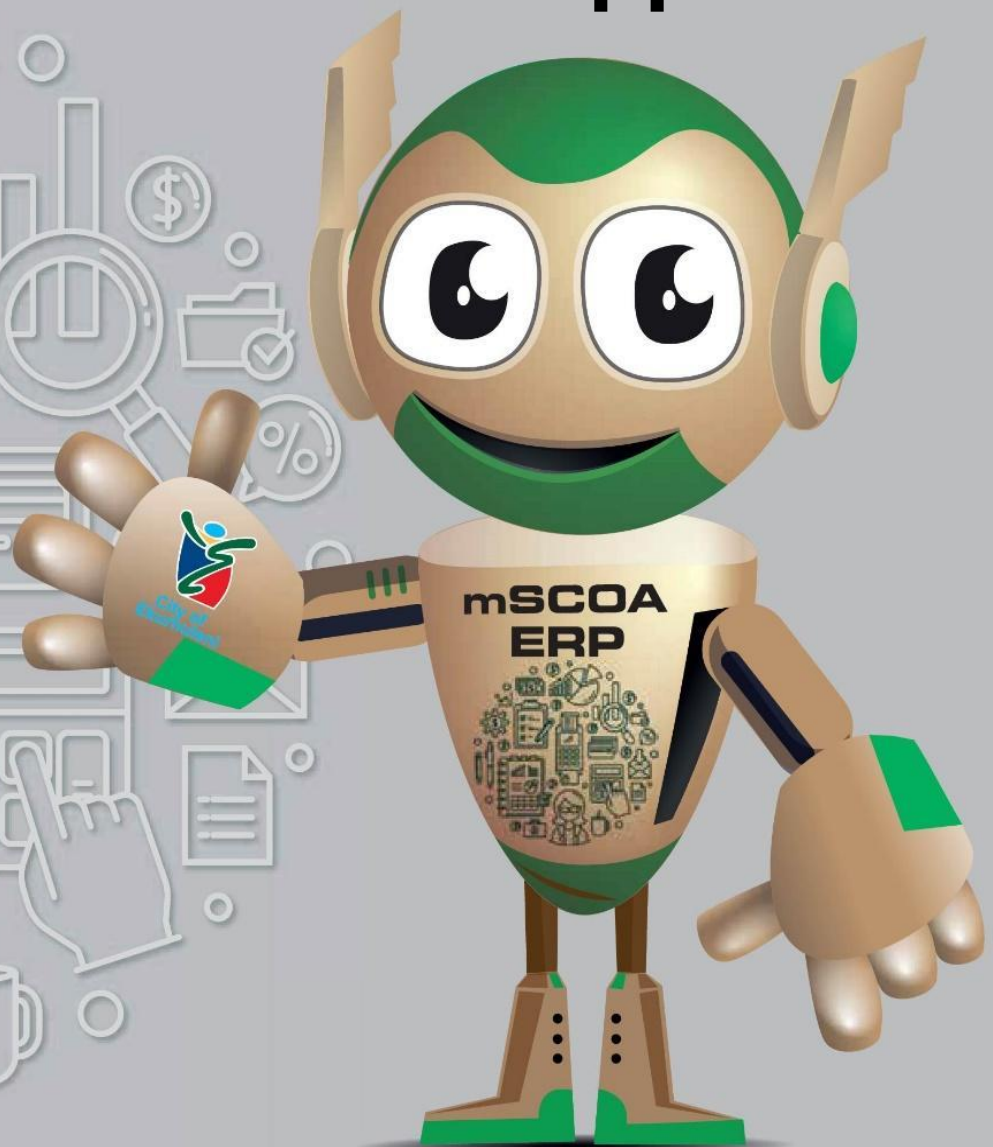
OUR JOURNEY
TO A SMART DIGITAL CITY

TABLE OF CONTENTS

1 OVERVIEW

1.1 INTRODUCTION

City of Ekurhuleni (COE) has a mandate to promote the Smart City concept for transformation, growth, development and ensure that all Ekurhuleni's citizens derive sustainable benefit from technology development. The Information and Communication Technology (ICT) department has a responsibility to ensure that ICT goals are aligned to and support the City's mission and strategic objectives of becoming and Smart, Creative and Developmental City, and that optimum business value is realized from ICT related investment services and assets. Information and Communication Technology (ICT) is one of the key strategic enabling department within the City. It uses and leverage on the implementation of technology to enable the City to deliver services effectively and efficiently.
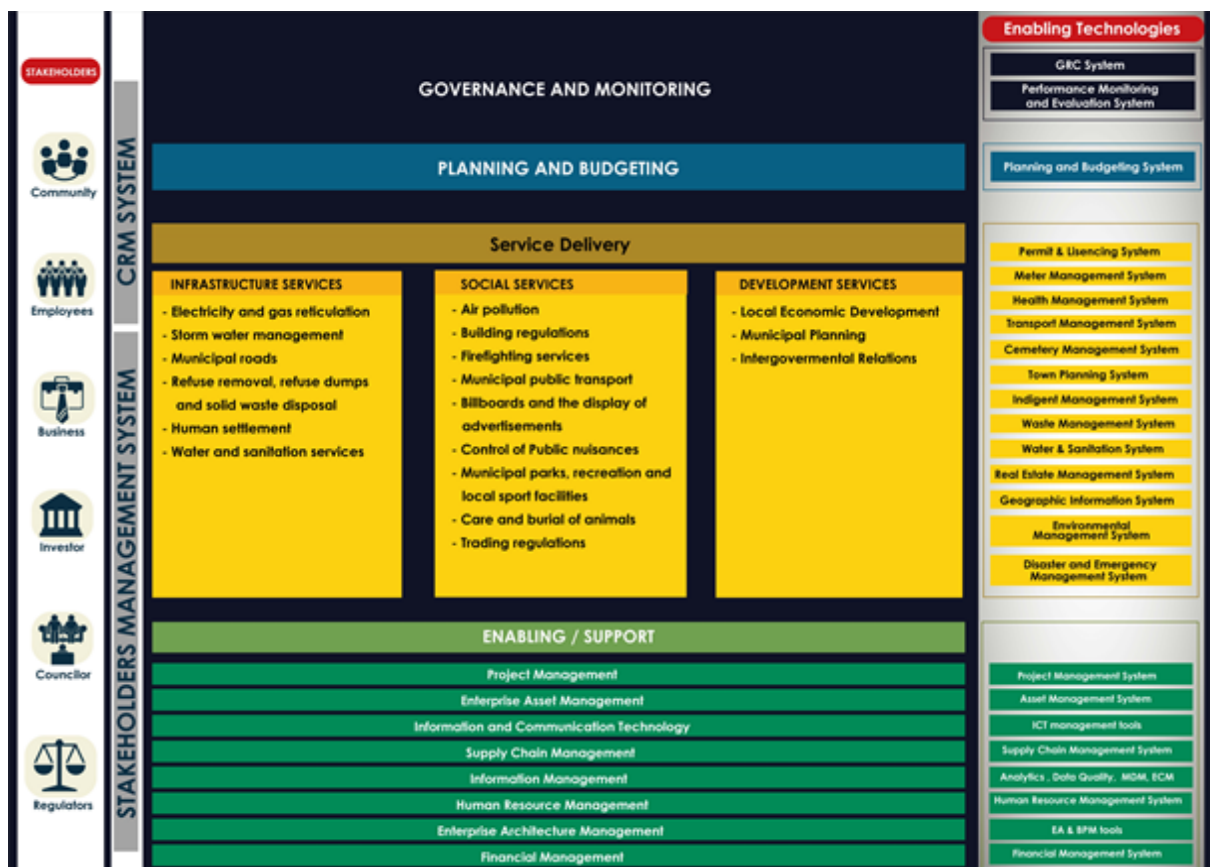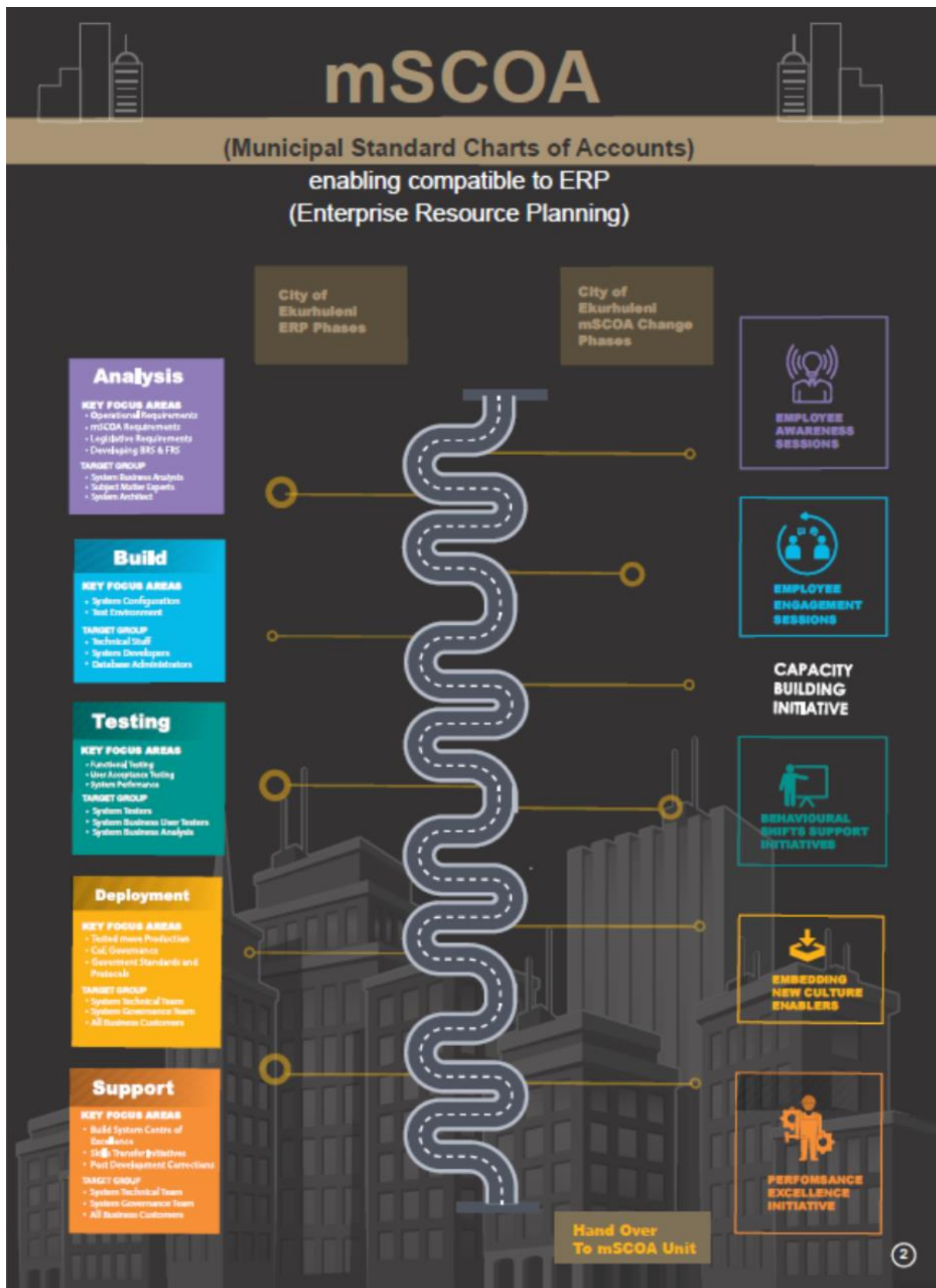

Figure 1 - City of Ekurhuleni Reference Model

2 GENERAL SYSTEM INFORMATION

The E-Wayleave Management Solution is developed and supported web-based Wayleave Solution.

In addition to automating the entire wayleave application process from receiving to approval of the application, the system enables full integration with all other key areas of business. The E-Wayleave Management Solution automates the entire process of a wayleave application, from the commencement of the application process until the final approval of the application is given. Each step of the process can be monitored and controlled by providing users with their required access rights and business process rules. The E-Wayleave Management Solution is the link between external consultants, contractors, and the internal business departments.

All information is transparent, and everyone is always aware of where each application is in the process and what additional information is required. The E-Wayleave Management Solution is now giving added value of increasing service delivery and transparency between all stakeholders.

3 LEARNING REQUIREMENTS

It is expected that learners have the following pre-requisites:

- Computer literacy
- A good understanding of the Wayleave system.
- Learners with special learning needs are required to inform their manager and the trainer.

This User Guide is intended for the following audience:
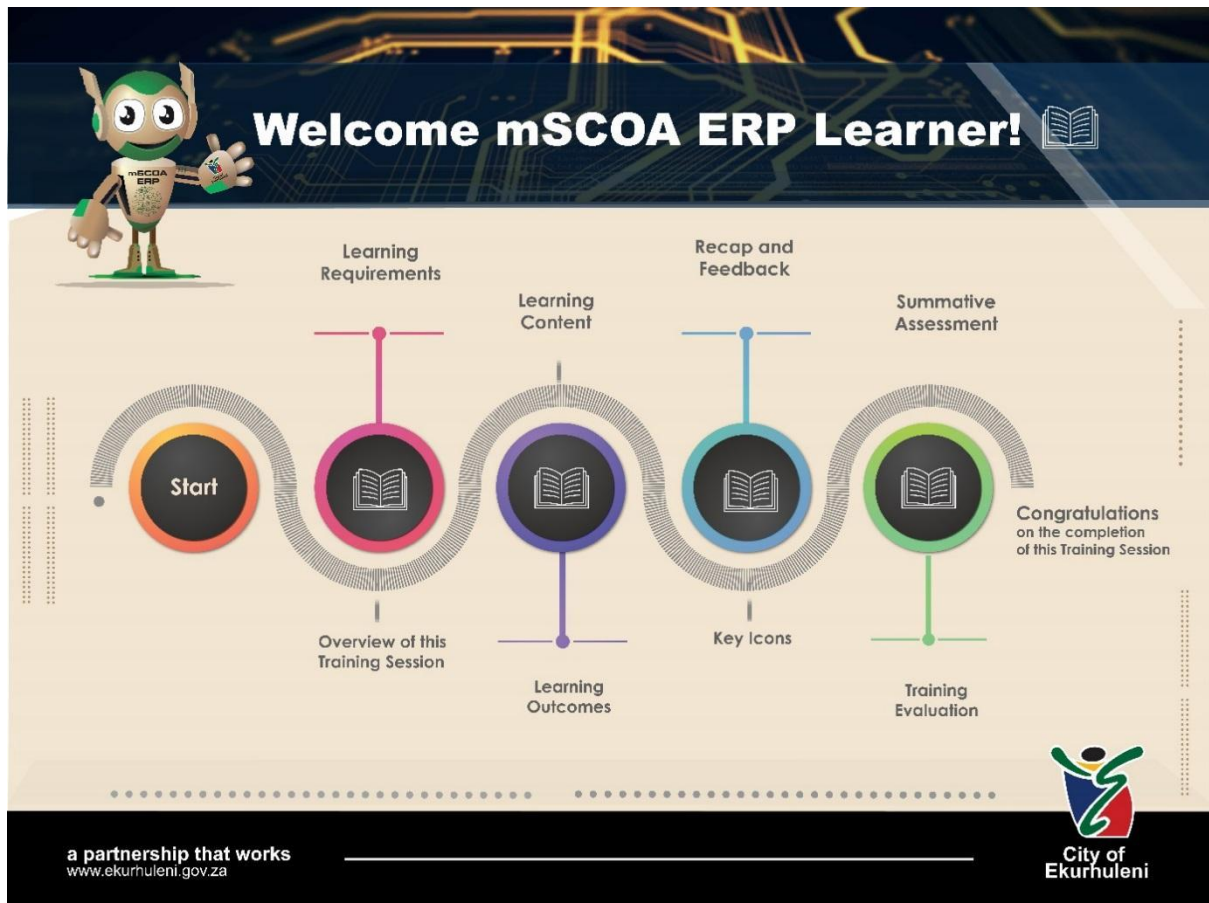
- Applicant (Consultant/ Contractor)

4 LEARNING EXPECTATIONS

Understand System Concepts:

- System login
- Registering as a new applicant
- Applying for a Wayleave
- Document Uploads

6 KEY AREAS OF LEARNING

1	REGISTERING ON WAYLEAVE
2	LOGIN TO WAYLEAVE AND THE DASHBOARD
3	APPLYING FOR A WAYLEAVE
4	PENDING PAYMENT
5	REJECTED APPLICATION
6	APPROVED APPLICATION
7	UPDATE USER PROFILE
8	LOG OFF

7 LEARNING OUTCOMES

At the end of this module, you will be able to:

- Navigate the Wayleave system.
- Apply for a Wayleave
- Upload documents
- Learn how to access information in the system

8 KEY ICONS WITHIN THE LEARNING MATERIAL

	Note
	Activity
	Information
	Learning Outcomes

9 REGISTERING ON WAYLEAVE

	After completing this sub-section, you will be able to register as a consultant/contractor on the Wayleave system.
	The process begins when the consultant/ contractor opens the Google chrome web browser and browse the following link in the browser search pane; http://102.130.114.194:9006/ , where they will be navigated to the City of Ekurhuleni Wayleave System Landing page.

Navigate

	On this screen: • Click on **Wayleave Account Login** • You will be navigated to the **Wayleave Account Login** page.

Screen
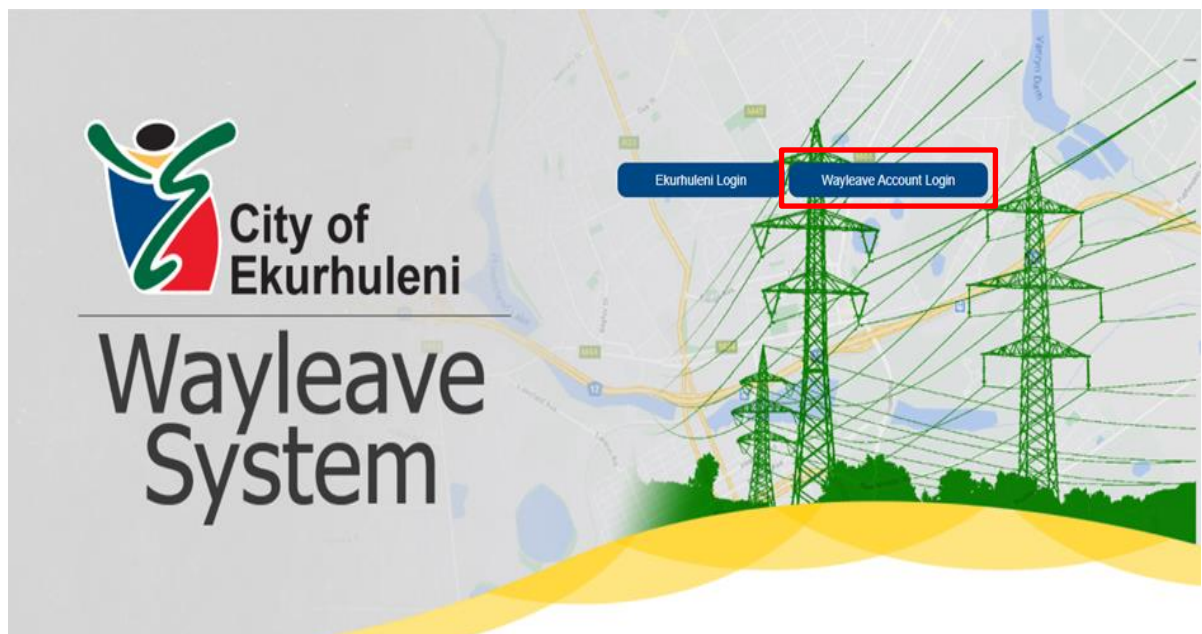
 Wayleave Landing Page

Navigate

	On this screen: • Click **Register** • You will be naviagted to the **Wayleave Account** page.

Screen
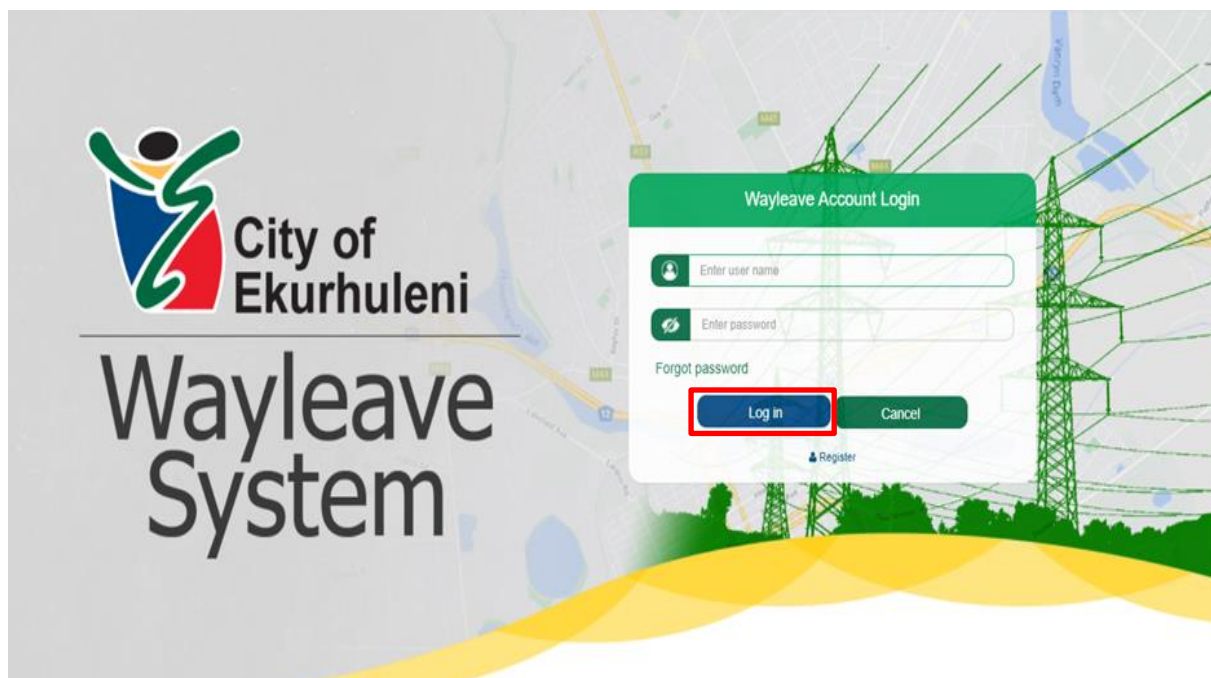
Wayleave Account Login

All fields that are mandatory are marked with a Red Asterisks *

Navigate

On this screen:

- Select the **Type of User** from the dropdown list, which is:

  - Consultant
  - Contractor

- Under the **Company Information** section, capture the following:

  - Company Name
  - Company Full Name
  - Company Registration Number

- For the **Expiration Date of Trade License**, click on the **Calendar** and make a selection of the year, month and date from the calendar picker.

- To **Upload Trade License**, click on **Choose File** button.

- Select the necessary document from the computer browser.

- Click on the **Open** button

- The uploaded document will be displayed in the field provided.

Screen

Wayleave Account

Company Information

Expiration Date of Trade License – Calendar Picker

Upload Trade License – Choose File
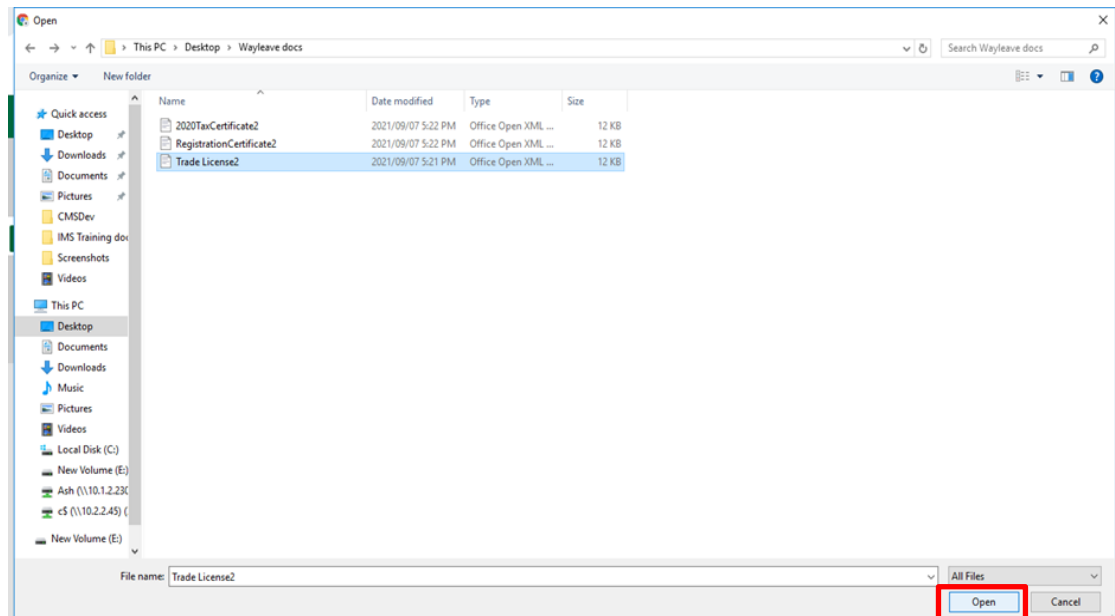
Computer Browser – Trade License Upload

Trade License Uploaded

Navigate

On this screen:

- Under the **Contact Person Information** section, capture the following:

    - Identification Number
    - Contact Person First Name
    - Contact Person Last Name
    - Gender
    - Designation
    - Telephone Number
    - Mobile Number
    - Email
    - Fax no.

Screen
Contact Person Information

Navigate

On this screen:
 	
• Click on **Address Information** to expand the section and capture the following:
 	
   - Street Name
   - City
   - Suburb
   - Province
   - Country
   - Post Code
 	
• Click on **Alternative Contact Information** to expand the section and capture the following:
 	
   - Contact Name
   - Contact Surname
   - Contact Number
   - Email
   - Designation

Screen
Address Information Section

Alternative Contact Information

Select	Contact Name	Contact Surname	Contact Number	Email	Designation		
○	James	Ndlovu	0814247891	j.ndlovu@gmail.com	Supervisor		

File Name Convention:

- Use Capital or lower letters to delimit words, not spaces. e.g.: RegistrationCertificate.

- Keep file names short but meaningful. E.g.: 2020TaxCerticate

- Don't save files containing any special characters. e.g., *:/\<>|"?[];=&%$#()

Navigate

On this screen:

- To upload **Registration Certificate**, click on **Choose File** button.

- Select the necessary document from the computer browser.

- Click on the **Open** button.

- The uploaded document will be displayed in the field provided.

- To upload **Tax Certificate**, click on **Choose File** button.

- Select the necessary document from the computer browser.

- Click on the **Open** button.

- The uploaded document will be displayed in the field provided.

- Click on the **Submit** button to complete the registration.

Screen

Supporting Documents

Computer Browser – Registration Certificate Upload

Registration Certificate Uploaded & To Upload Tax Certificate
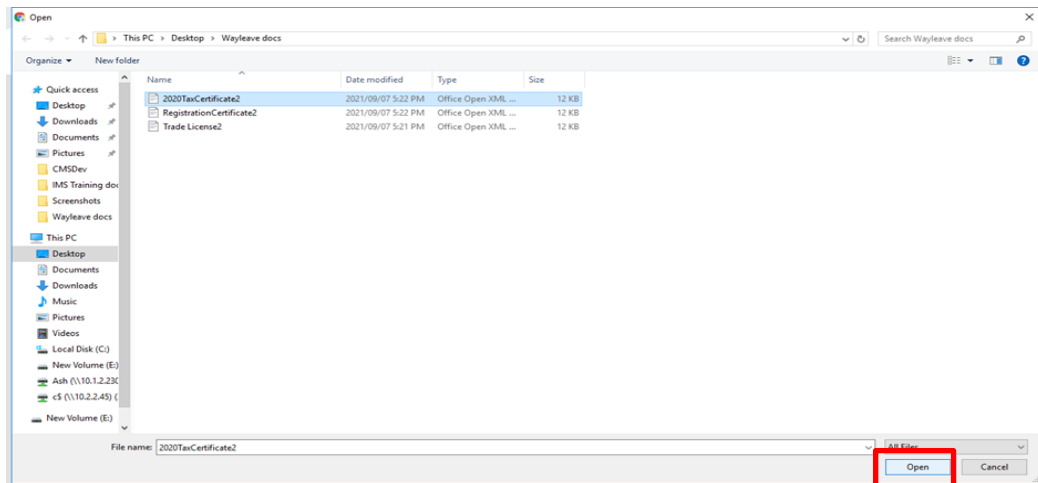
Computer Browser – Tax Certificate Upload

Tax Certificate Uploaded

	• A **Success popup** will be displayed, notifying you that the Wayleave Account is created successfully and for future reference write down the following details:
	- Account Number
	- Username
	- Password
	• After a few seconds, you will be re-directed to the **Wayleave Account Login** page.
	• You will also receive an **email** with the **Wayleave account credentials**.

Screen

Wayleave Account Created Successfully Notification

Wayleave Account Login Page

Email – Wayleave Account Credentials

You have now successfully completed this sub-section

10 LOGIN TO WAYLEAVE AND THE DASHBOARD

	After completing this sub-section, you will be able to login to Wayleave and view the Dashboard.
	After registration, the consultant/ contractor can login to have access to Wayleave.

Navigate
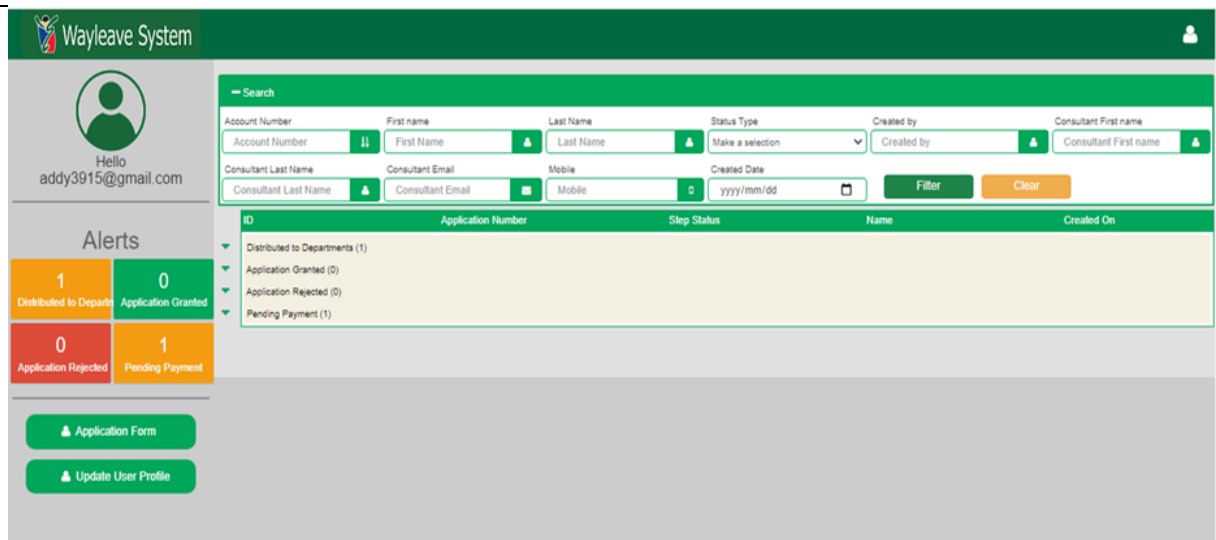
	On this screen: • Enter your valid **Username and Password** • Click on the **Log in** button • You will be navigated to the **Wayleave Dashboard**.

Screen
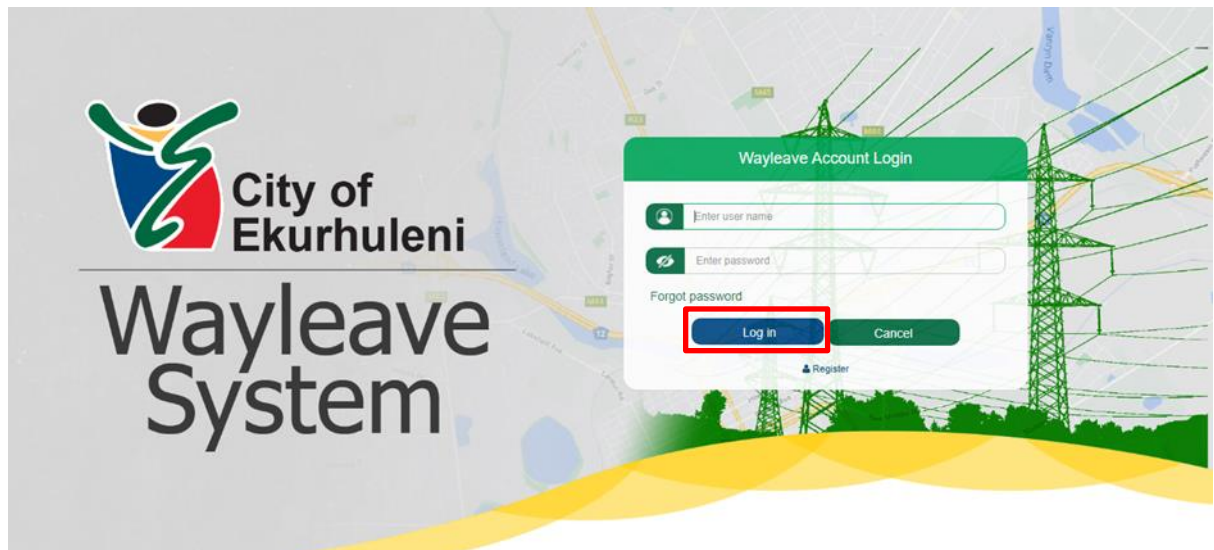
Wayleave Account Login Page

Wayleave Dashboard

Navigate

On this screen:

- You are able to search for applications using various filters in the **Search** fields.

- The filters are:

  - Account Number
  - First Name
  - Last Name
  - Status Type
  - Created By
  - Consultant First Name
  - Consultant Last Name
  - Consultant Email
  - Mobile
  - Created Date

- Click on the **Filter** button to get searched results.

Screen

Search Fields

	• Distributed to Department queue enables you to get a view of all applications which have already been distributed to the required departments for actioning.
	• Application Granted queue enables you to get a view of all applications that have been approved.
	• Application Rejected queue enables you to get a view of all applications that have been rejected.
	• Pending Payment queue enables you to view all applications that require payment receipt to be uploaded in order to proceed with the application.

Navigate	

	On this screen:
	
	• To access an application, you will need to select dropdown arrow on the queue of choice.
	
	• The list of applications in the queue of choice will display:
	
	  - ID
	  - Application number
	  - Step Status
	  - Name
	  - Created on
	
	• To select a particular application, click on the application **ID.**
	
	• You will be navigated to the **Wayleave Application** page.

Screen

ID	Application Number	Step Status	Name	Created On
▼ Distributed to Departments (1)				
▼ Application Granted (0)				
▼ Application Rejected (0)				
▼ Pending Payment (1)				

Application Queues

ID	Application Number	Step Status	Name	Created On
▼ Distributed to Departments (1)				
▼ Application Granted (0)				
▼ Application Rejected (0)				
▼ Pending Payment (1)				
152	APP21090150	Pending Payment	Calvin Buthelezi	2021-09-29

Application Queue Dropdown

	The Left Navigation Panel consists of: • The User Icon which will navigate you back to the dashboard.

	• The Alerts which display the total count of applications. The types of Alerts are listed below:
	
	   - Distributed to Departments
	   - Application Granted
	   - Application Rejected
	   - Pending Payment
	
	• Application Form item
	
	• Update User Profile item
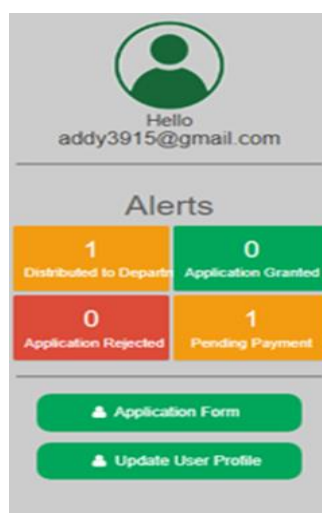
Screen
  Left Navigation Panel

You have now successfully completed this sub-section

11 APPLYING FOR A WAYLEAVE

	After completing this sub-section, you will be able to submit a Wayleave Application Form.
	The Consultant/ Contractor needs to submit a Wayleave Application Form, in order to get a Wayleave approval/ permission to perform the work on site.

Navigate

	On this screen: • Click **Application Form** on the left navigation panel. • You will be navigated to the **Wayleave Application** page.
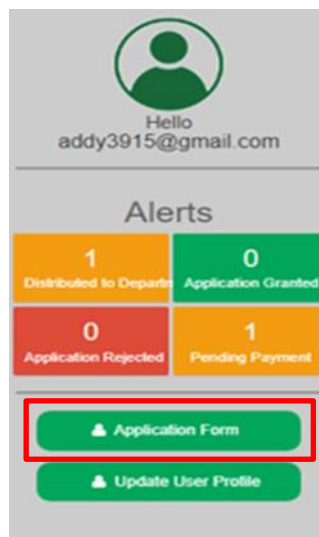
Screen

Left Navigation Panel

	All fields that are mandatory are marked with a Red Asterisks *

Navigate

	On this screen: • The **Applicant Details** and the **Consulting Engineer Details** are populated from the Wayleave Account.

Screen
Wayleave Application

Navigate

On this screen:
 	
 • Click on **Contractor Details** to expand the section and capture the following:
 	
  - Name
  - Surname
  - Tel Number
  - Mobile Number
  - Email
 	
 • To capture the **Address**, click on the **location** icon.
 	
 • The **Address Location** will be displayed.
 	
 • Enter the address in the search field.
 	
 • Automatically the search field will start filtering addresses that are the

same/ similar to what you have typed in the search field.

- Click on the correct address from the list.

- The **Searched Results** will be displayed in the map.

- Click on the **Close** button.

- The address will be populated under **Contractor Details**.

Screen

Contractor Details
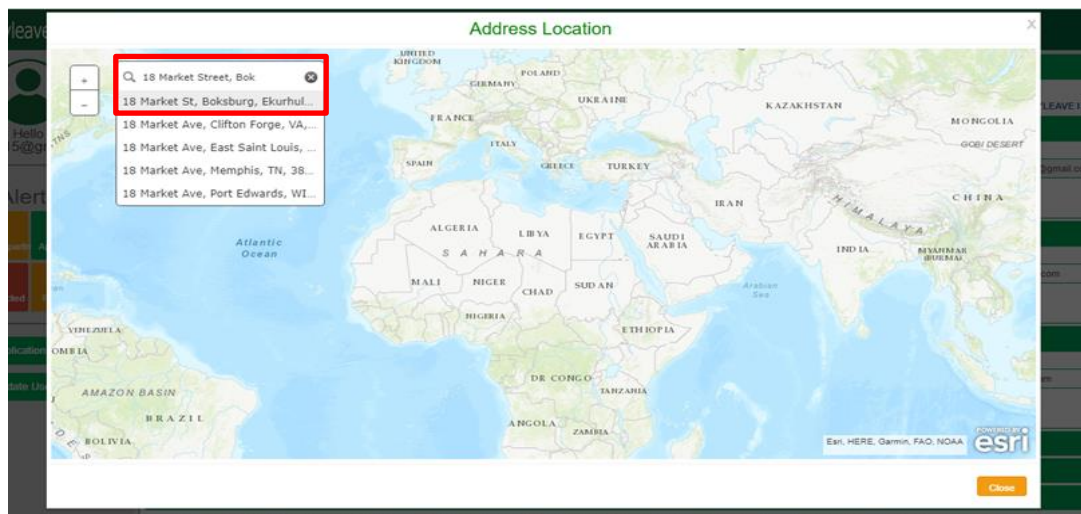
Address Location
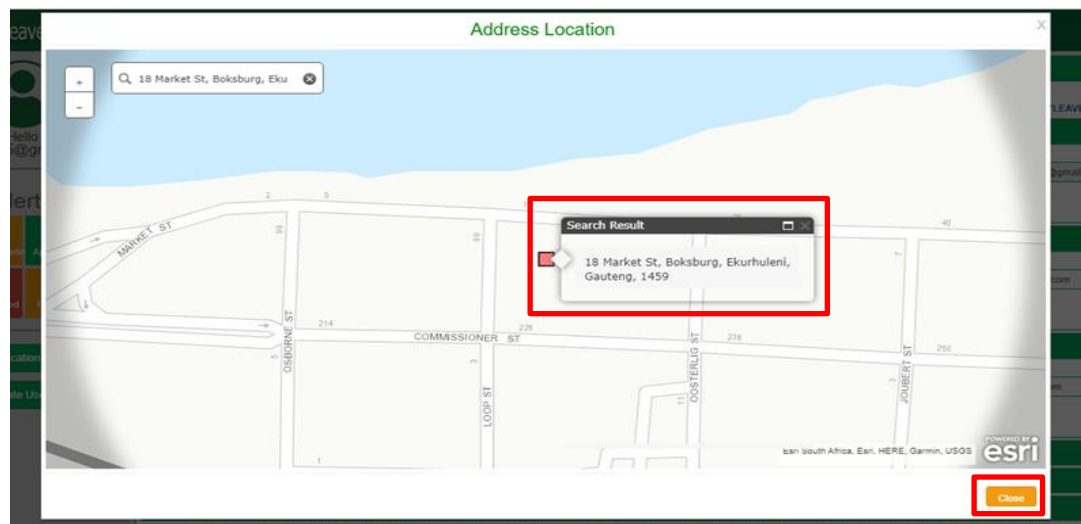
Search Results

Contractor Details

Name	Surname	Tel Number	Mobile Number	Email
Kenneth	Dube		0605263374	k.dube1@gmail.com

Address
18 Market St, Boksburg, Ekurhu

Address Populated

Navigate

On this screen:

- Click on **Provisional Dates** to expand the section and input the Starting Date by clicking on the **Calendar Picker**.

- Make a selection of the year, month and date on the calendar picker.

- The **Starting Date** will be populated in the text field based on your selection.

- The **Estimated Completion Date** will be autofilled, once the Starting Date has been captured.

Screen

— Provisional Dates

Starting Date
yyyy/mm/dd 🗓

Estimated Completion Date
yyyy/mm/dd

Provisional Dates

Starting Date
yyyy/mm/dd 🗓

September 2021 ▾   ↑   ↓

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	**27**	28	29	30	1	2
3	4	5	6	7	8	9

Today

Calendar Picker

— Provisional Dates

Starting Date
2021/10/11 🗓

Estimated Completion Date
2022/04/27

Provisional Dates Completed

Navigate	
	On this screen: • Click on **Project Details** to expand the section and enter the **Project Number**.

Screen	
	<table><tr><td>**– Project Details**</td></tr><tr><td>Project Number</td></tr><tr><td></td></tr></table>
	Project Details

	The guidelines/ terms and conditions regarding Excavation, will be displayed in blue.

Navigate	

	On this screen:
	
	• Click on **Excavations Details** to expand the section and capture the following:
	
	    - Type of Road Crossing
	    - Excavation Length
	    - Width
	    - Depth
	
	• To capture the **Starting Address**, click on the **location** icon ⬛.
	
	• The **Address Location** will be displayed.
	
	• Enter the address in the search field.
	
	• Automatically the search field will start filtering addresses that are the same/ similar to what you have typed in the search field.
	
	• Click on the correct address from the list.
	
	• The **Searched Results** will be displayed in the map.
	
	• Click on the **Close** button.
	
	• The **Starting address** will be populated under Excavation Details.
	
	• To capture the **Ending Address**, follow the same procedure as Starting

Address.

- Provide a detailed **Description of Work** to be performed, in the text box field.

Screen

Excavation Details

Address Location

Search Results

Address Populated

Description Box

	• A minimum of 1 document needs to be uploaded.
	• Uploaded documents must not exceed 5MB.
	• The upload procedure is the same when uploading any document.

Navigate
On this screen: • Click on **Supporting Documents** to expand the section. • To upload a document (E.g. Drawings), click on **Choose File** button. • Select the necessary document from the computer browser. • Click on the **Open** button • The uploaded document will be displayed in the field provided. • Once you have uploaded all the necessary documents, **tick the relevant checkboxes** to declare that the drawings provided meet the requirements. • Click on the **Submit** button.

Screen

Supporting Documents – Choose File
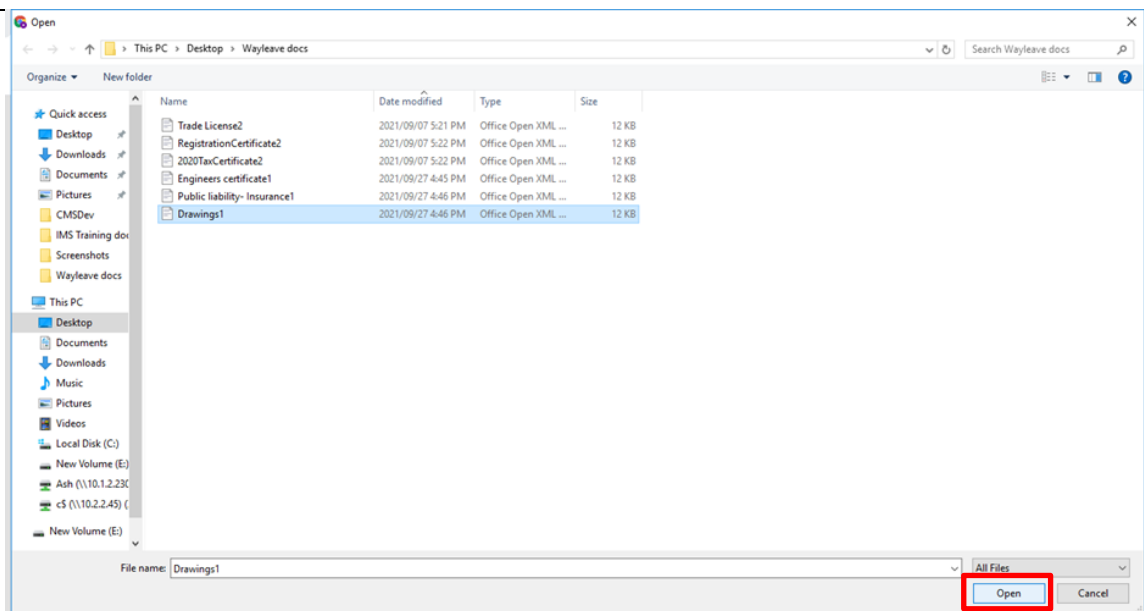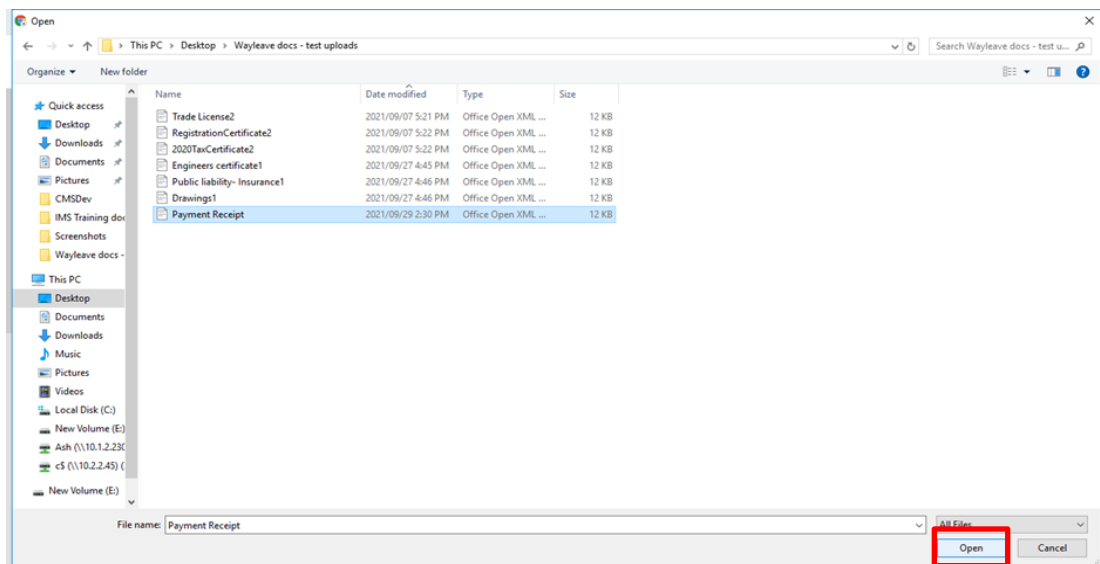
Computer Browser

Supporting Documents – Document Uploaded

Tick relevant Checkboxes & Submit

- Selecting the **Pay Now** option, will navigate you to the Siyakhokha Payment Gateway.

- You can make an immediate payment by selecting Masterpass Payment or Instant EFT.

- Once the payment has been made, automatically the payment receipt will be uploaded for viewing on Wayleave.

Navigate

	On this screen:
	• Click on **Pay Later** button
	• A Success popup will be displayed, notifying you that the Wayleave Application status is **Pending Payment** and provides you with a reference number.
	• You will be re-directed to the **Wayleave Landing** page.

Screen

Payment Details Popup

Success Notification – Pending Payment

Wayleave Landing Page

You have now successfully completed this sub-section

12 PENDING PAYMENT

	After completing this sub-section, you will be able to upload a payment receipt and distribute the Wayleave application to the departments.
	To continue to proceed with the Wayleave application process, the consultant/ contractor will need to upload a payment receipt.
	• Pending Payment status only applies when the Pay Later payment option was used. • This option requires you to upload a payment receipt.

Navigate

	On this screen:
	
	• Click **Pending Payment** dropdown arrow, on the **Dashboard**.
	
	• The list of applications in the Pending Payment queue will display:
	
	  - ID
	  - Application number
	  - Step Status
	  - Name
	  - Created on
	
	• To select a particular application, click on the application **ID**.
	
	• The Wayleave application form will be displayed.

Screen

Dashboard

Pending Payment Applications

Wayleave Application

Navigate

On this screen:

- To upload the payment receipt on the **Wayleave Application**, click on **Supporting Documents** subtitle to expand the section.

- Click on **Choose Files** button, on the **EFT Payment Method**.

- Select the necessary document from the computer browser.

- Click on the **Open** button

- The **Payment Receipt** will be uploaded and reflect in the field provided.

- Click on the **Submit** button.

Screen

Supporting Documents

Computer Browser

Payment Receipt Uploaded

	Navigate	

On this screen:

- After clicking on submit, a notification will display: **Application form updated successfully**.

- You will be re-directed back to the **Dashboard**.

- The application has now moved from **Pending Payment** to **Distributed to Departments,** for reviews and actioning.

	Screen	

EFT Payment Receipt Uploaded

You have now successfully completed this sub-section

13 REJECTED APPLICATION

	After completing this sub-section, you will be able to view rejected applications.
	• Emails will be sent to the consultant/ contractor, notifying them of the application status. • The consultant/ contractor can view the rejected reason on the application. • Make amendments if necessary and re-submit.

Navigate

	On this screen:
	
	• Click on **Application Rejected** dropdown arrow, on the **Dashboard**.
	
	• The list of applications in the **Application Rejected** queue will display:
	
	  - ID
	  - Application number
	  - Step Status
	  - Name
	  - Created on
	
	• To select a particular application, click on the application **ID**.
	
	• The Wayleave application form will be displayed.

Screen

Dashboard

Rejected Applications

Wayleave Application

	• To view the comments pertaningas to why the application was rejected.Click on **Excavation Details** subtitle to expand the section,

Screen

Excavation Details – Description of Work

You have now successfully completed this sub-section

14 APPROVED APPLICATION

	After completing this sub-section, you will be able to view approved applications.
	• Emails will be sent to the consultant/ contractor, notifying them of the application status. • The consultant/ contractor can view the approved applications.
	To view details pertaining to the application, click on the respective subtitle. The subtitles in the application are as thus: • Application Details • Consulting Engineer Details • Contractor Details • Provisional Dates • Project Details • Excavation Details • Supporting Documents

Navigate

| | On this screen:

• Click on **Application Granted** dropdown arrow, on the **Dashboard**.

• The list of applications in the **Application Granted** queue will display:

   - ID
   - Application number
   - Step Status
   - Name
   - Created on

• To select a particular application, click on the application **ID**.

• The Wayleave application form will be displayed. |

Screen

Dashboard

Approved Applications

Wayleave Application

You have now successfully completed this sub-section

15 UPDATE USER PROFILE

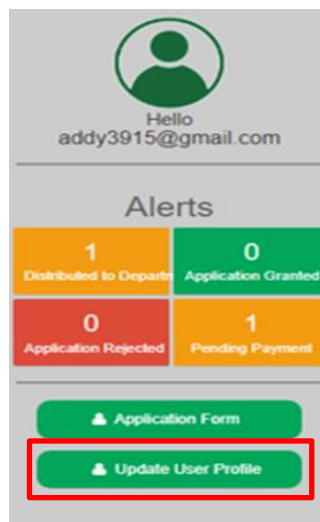|	
	After completing this sub-section, you will be able to update the details on your user profile.
	As a consultant/ contractor you have the function to update details and upload documents on your user profile.

Navigate
On this screen: • Click on **Update User Profile** on the Left navigation panel. • You will be navigated to the **Wayleave Account**. • Amend the field of your choice. • Click on the **Update** button. • A Success notification will be displayed: **Wayleave account update successfully!**

Screen

Hello
addy3915@gmail.com

Alerts

1	0
Distributed to Departm	Application Granted
0	1
Application Rejected	Pending Payment

🔒 Application Form

🔒 Update User Profile

Left Navigation Panel

Wayleave Account

Account Updated Notification

You have now successfully completed this sub-section

16 LOG OFF

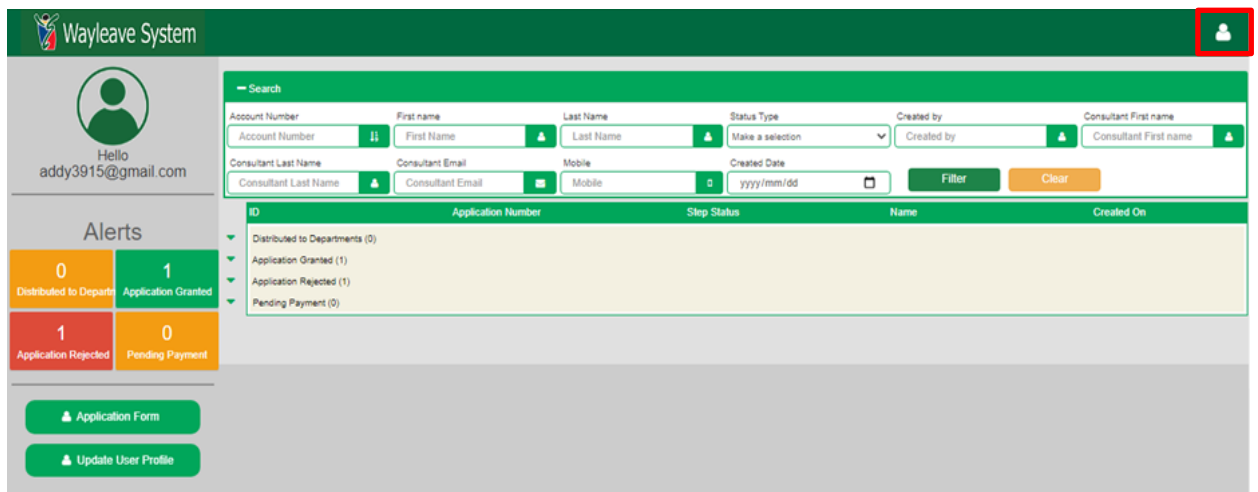|	
	After completing this sub-section, you will be able to log off the Wayleave system.

Navigate

	On this screen:
	• Click on the **User Profile** icon on the top right of the Dashboard.
	• Click on **Sign Out**
	• You will be navigated the to **Wayleave Landing** page.

Screen

Dashboard

Sign Out

Wayleave Landing Page

You have now successfully completed this sub-section

17 HELPFUL HINTS

• Be able to find useful guidelines throughout the application:

Screen	Navigate
Hello addy3915@gmail.com	Clicking on the user icon on the left navigation panel enables the user to return to the dashboard.
	The user profile enables you to view your account details and sign out.
	The red arrow icon enables you to return to the top of the page.
Filter	The filter button enables you to filter the system to provide the searched results.
Clear	The clear button enable you to reset the search fields.

18 ASSESSMENTS OF SPECIFIC LEARNING OUTCOMES

Description of Learning Outcomes		
Were you able to?	**Yes Tick** ✓	**No Tick** ✓
REGISTERING ON WAYLEAVE		
LOGIN TO WAYLEAVE AND THE DASHBOARD		
APPLYING FOR A WAYLEAVE		
PENDING PAYMENT		
REJECTED APPLICATION		
APPROVED APPLICATION		
UPDATE USER PROFILE		
LOG OFF		

19 NEXT STEPS

You will be required to complete the following:

	Training Evaluation
	Assessment