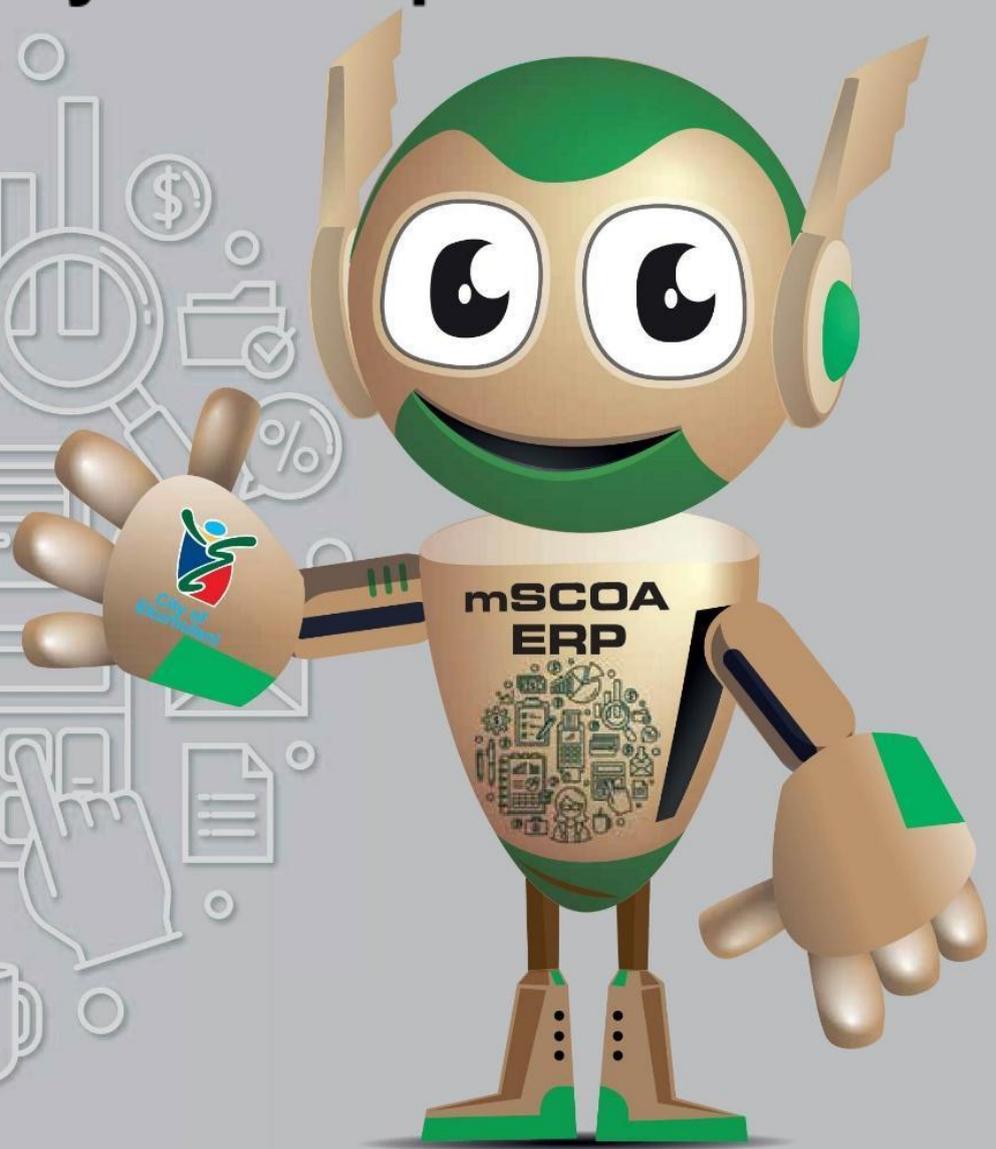


ERP Functional USER MANUAL

Training Manual

Property Lease Management Community Development Officer



OUR JOURNEY
TO A SMART DIGITAL CITY



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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.

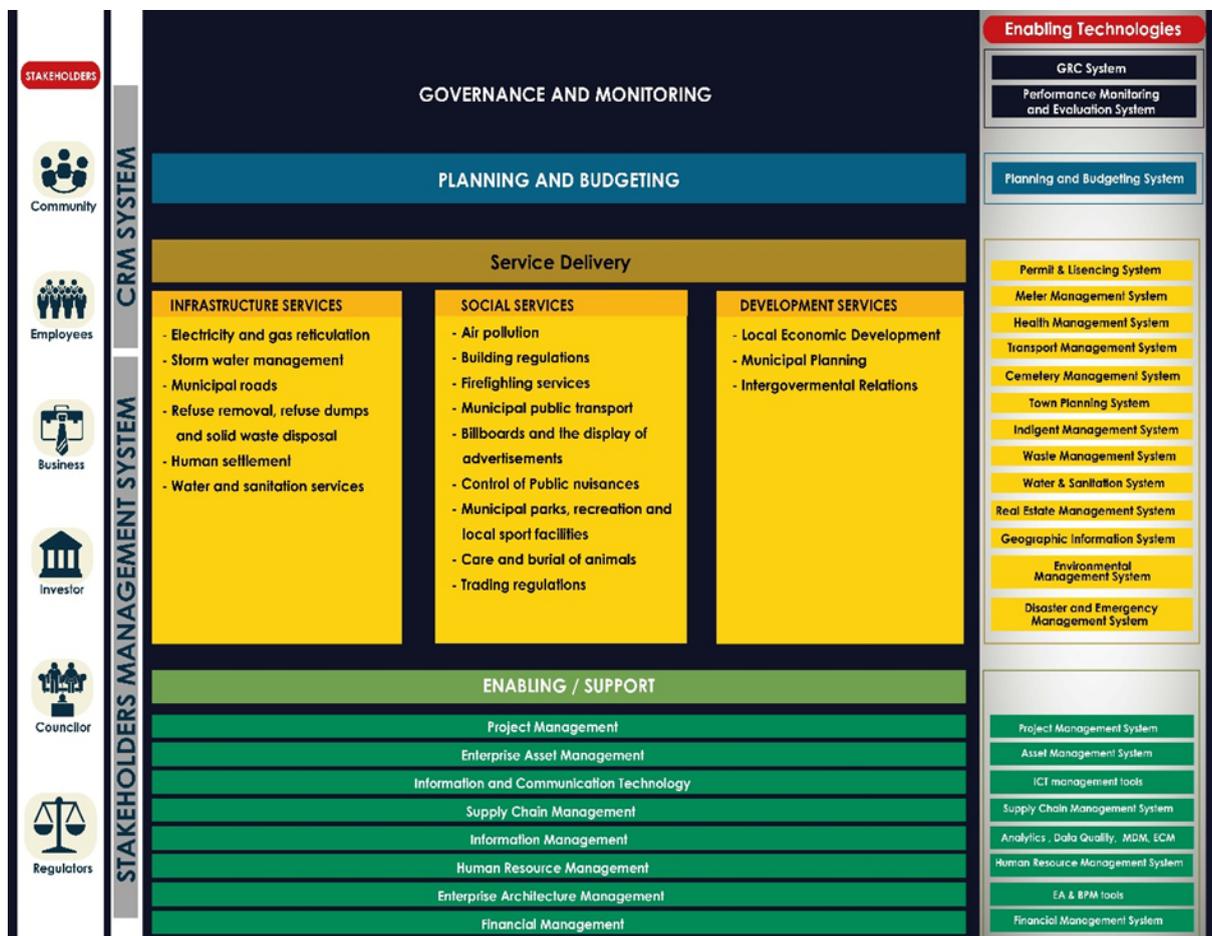


Figure 1: City Model

The municipal reference model has been set as a standard capability reference for all the departments. It illustrates the core, enabling/ support functions and its relevant systems, and the different stakeholders involved.

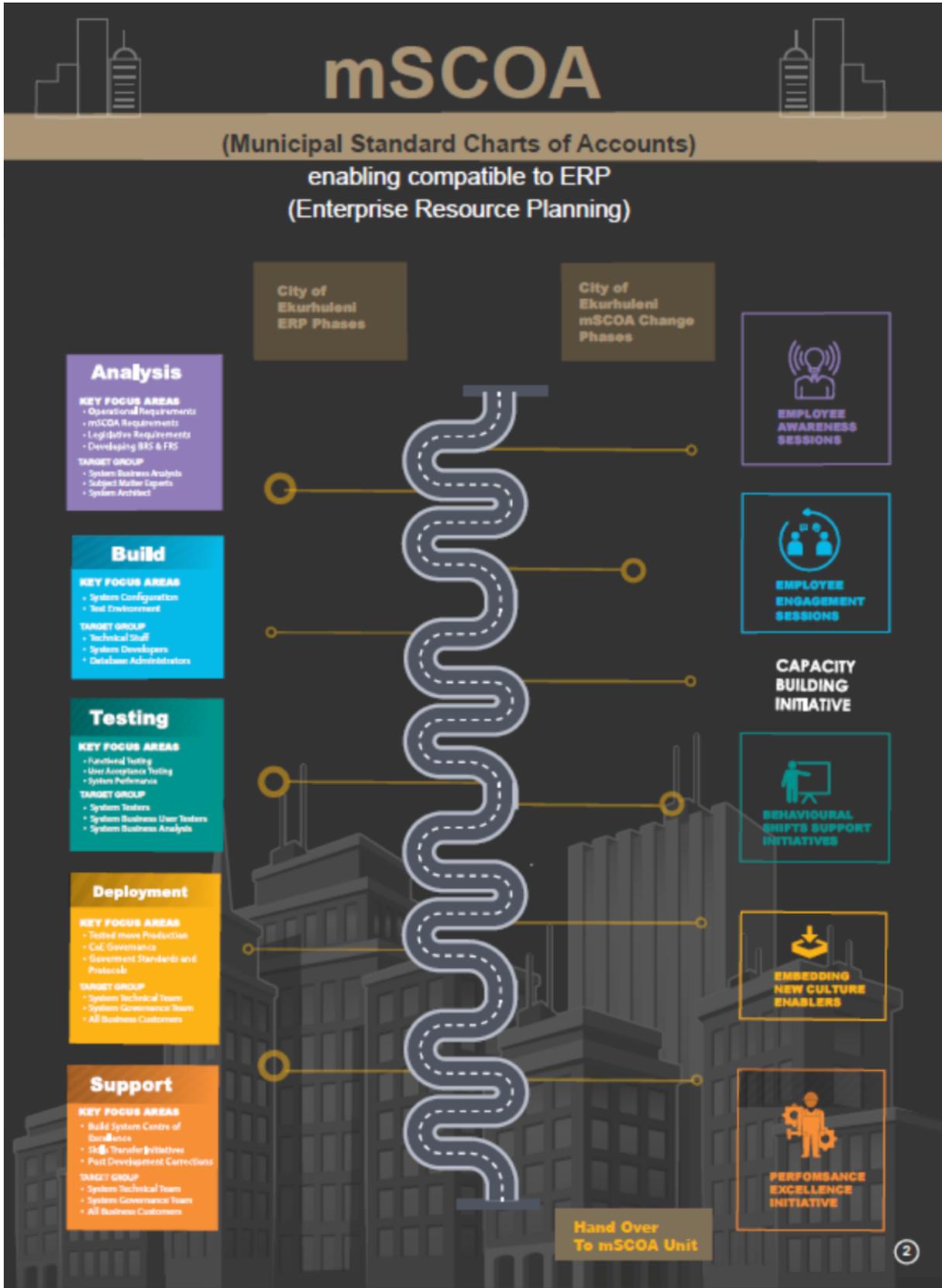
Governance and Monitoring is an overarching capability providing an oversight to all capabilities in the municipality.

Strategy capability is responsible for all planning and budget related capability for the CoE municipality. Evaluating existing business unit strategy based on the company's strategy and eliminate unwanted/unnecessary resources/elements and re-consider necessary resources to meet the overall company's strategy.

Core capability is all the municipality business processes mandated by the municipal act, to provide all constitutionally mandated services as prescribed by the Section 4 B and Schedule 5 Part B of the constitution.

Enabling/Supporting capability is all the transversal function within the municipality, that provide support to core process with a view to deliver the municipal mandated services.

Enabling Technology is all the systems/ applications used by the municipality to support internal business process, each capability layer will comprise associated applications.



2 GENERAL SYSTEM INFORMATION

Property Letting is one of the revenue generating streams within EHC, which is an entity owned by the city, its mandate is to manage the leasing of city owned flats, which are for social housing to people earning between R3500 and R15 000. EHC does not have any system to support their leasing function. Most of the processes are still managed manually using spreadsheets which has negative effect on operations and the reporting thereof. There is a need to implement a fully integrated system, that will support the Property Lease Management capability end to end for EHC.

3 LEARNING REQUIREMENTS

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

- Computer literacy
- A good understanding of the Property Lease Management (PLM) system.
- Learners with special learning needs are required to inform their manager and the trainer.

This User Guide is intended for the following audience:

- Community Development Officer

4 LEARNING EXPECTATIONS

Understand System Concepts:

- System login
- Invite client for training

5 LEARNING JOURNEY

Welcome mSCOA ERP Learner!

Start

Learning Requirements

Learning Content

Recap and Feedback

Summative Assessment

Overview of this Training Session

Learning Outcomes

Key Icons

Training Evaluation

Congratulations on the completion of this Training Session

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City of Ekurhuleni

6 KEY AREAS OF LEARNING

1	LOGIN TO PLM
2	INVITE TENANT FOR TRAINING

7 LEARNING OUTCOMES

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

- Navigate the Property Lease Management system (PLM).
- Invite client for training

8 KEY ICONS WITHIN THE LEARNING MATERIAL

	Note
	Activity
	Information
	Learning Outcomes

9 LOGIN TO PLM



After completing this sub-section, you will be able to successfully login to Property Lease Management as the Revenue Officer.



The process begins when you as the Community Development Officer opens the Google chrome web browser and inputs the following link in the browser search pane: <https://propertylease.ekurhuleni.gov.za> , where you will be navigated to the City of Ekurhuleni Property Lease Management landing page.



User must be able to sign in, to work on the Property Lease Management system.

Navigate



On this screen:

- Click **Profile** dropdown arrow on the left navigation panel.
- Click on the **Sign In** item.
- You will be navigated to the **Sign In** page.

Screen



Coe PLM Landing Page - Profile

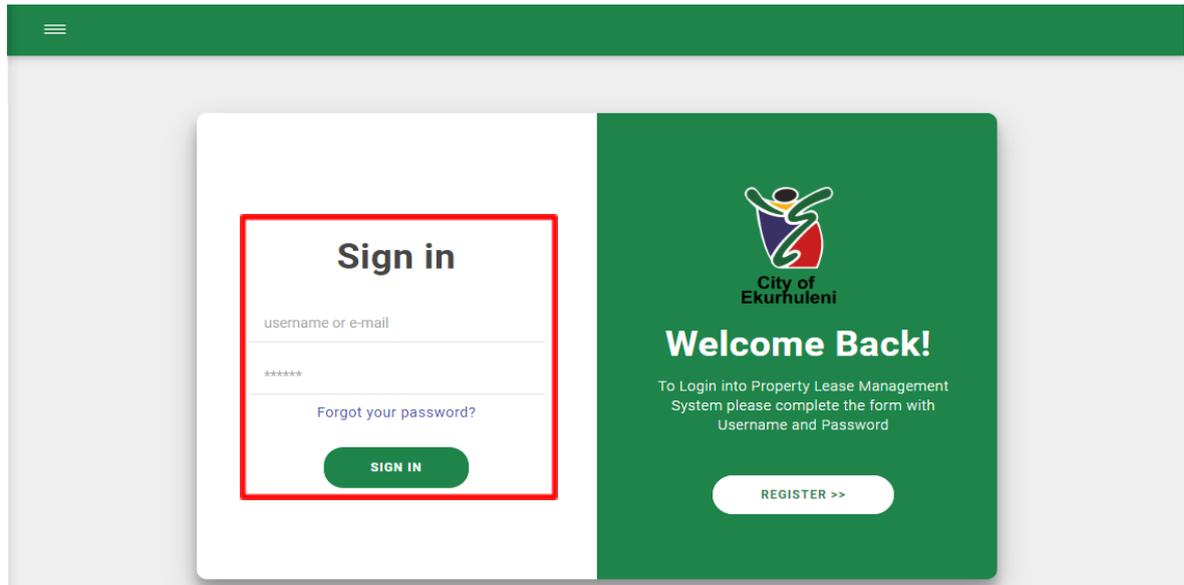
Navigate



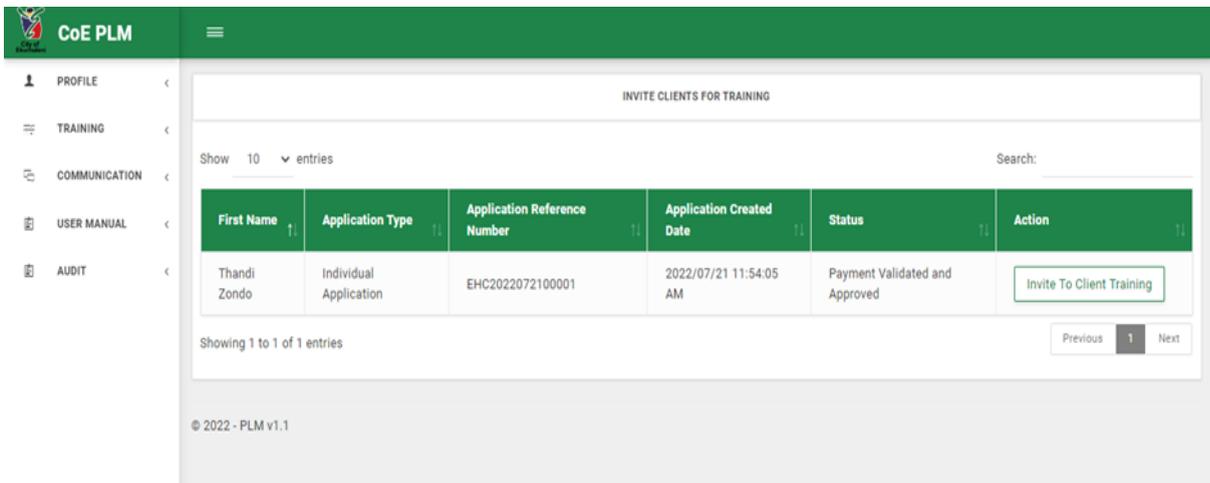
On this screen:

- Enter your active directory **Username and Password**
- Click on the **Sign In** button
- You will be navigated to the **Invite Clients For Training** page.

Screen



Sign In Page



Invite Clients For Training Page

You have now successfully completed this sub-section

10 INVITE TENANT FOR TRAINING



After completing this sub-section, you will be able to invite the tenant for training.



Once the application payment has been validated and approved, the Community Development Officer will need to invite the tenant for training.



The application status will be Payment Validated and Approved.

Navigate

On this screen:

- Once logged in, you will be on the **Invite Clients For Training** page.

OR

- Select **Invite To Training** under **Training** item on the navigation panel.
- You will be navigated to the **Invite Clients For Training** page.
- Click the **Invite Clients For Training** button on the application of choice.
- You will be navigated to the **Client Meeting Details** page.



Screen

CoE PLM

INVITE CLIENTS FOR TRAINING

Show 10 entries

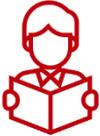
First Name	Application Type	Application Reference Number	Application Created Date	Status	Action
Thandi Zondo	Individual Application	EHC2022072100001	2022/07/21 11:54:05 AM	Payment Validated and Approved	Invite To Client Training

Showing 1 to 1 of 1 entries

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Invite Clients For Training Page

Navigate



On this screen:

- Under **Evaluating Applications** sub-section, click on the **View** button.
- This gives you access to view information on the application, such as:
 - Application Details
 - Applicant Details
 - History
 - Documents
- Under the **Client Meeting Details** sub-section, click on the **Calendar** and make a selection for the **Meeting Date**.
- Input the **Meeting Venue**.
- Capture meeting **Comments** in the text box provided.
- Click on the **Submit** button.
- A confirmation popup box will display, **Are you sure you want to submit this client training invite?**, Click **Yes, I am sure!** to acknowledge.
- You will be re-directed to the **Invite Clients For Training** page.

Screen

EVALUATING APPLICATION

Show 10 entries Search:

Reference Number	Applicant Type	Status	Captured Date	Customer Name	Action
EHC2022072100001	Individual Application	Payment Validated and Approved	2022/07/21 11:54:05 AM	Thandi Zondo	View

Showing 1 to 1 of 1 entries Previous 1 Next

CLIENT MEETING DETAILS

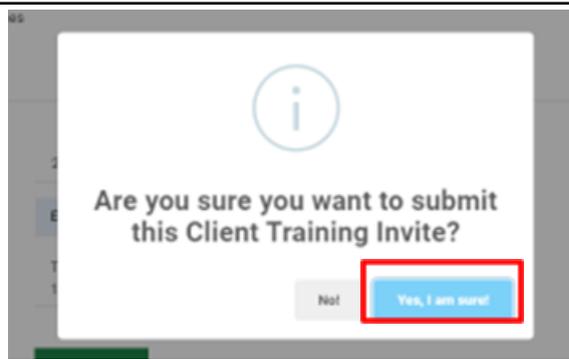
Meeting Date* 

Meeting Venue*

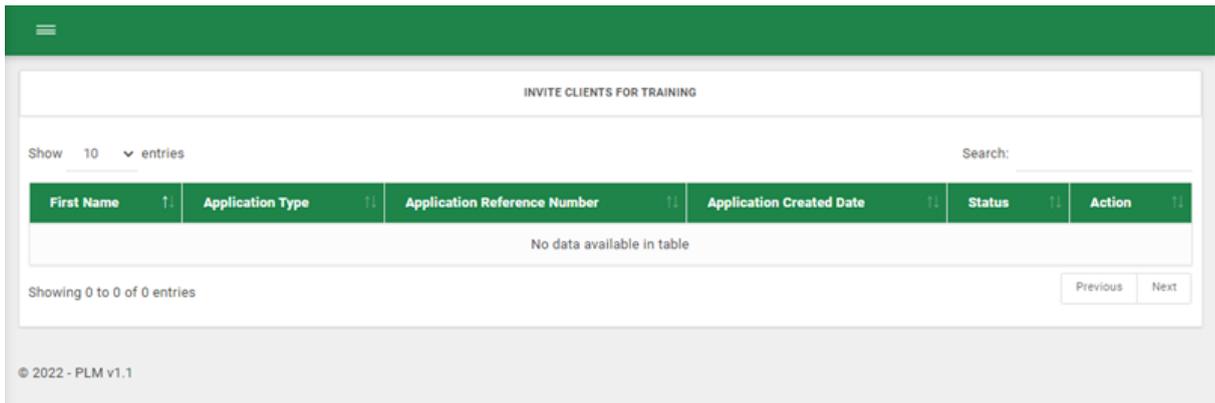
Meeting Comments

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Client Meeting Details Page



Confirmation Popup



Invite Clients For Training Page



- The Customer/ Tenant will receive an email/sms with the training invite.
- The application will move to the relevant Housing Supervisor's work queue.

You have now successfully completed this sub-section

11 HELPFUL HINTS

- Be able to find useful guidelines throughout the application:

Screen	Navigate
	Clicking on COE PLM, refreshes the current page.
	The navigation bar allows you to expand or compress the left navigation panel.
* Red Asterisks	The Red Asterisks next to a specific field, means that it is mandatory to complete that field.
	The Browse button allows you to search your computer to find the relevant document that you would like to upload.
	The Search functionality allows you to find what you are looking for.
	The View button allows you to view the attached/generated document.
 USER MANUAL <	Clicking on the User Manual item on the navigation panel, gives to access to view the guidelines of how to navigate the PLM system.

12 ASSESSMENTS OF SPECIFIC LEARNING OUTCOMES

Description of Learning Outcomes		
Were you able to?	Yes Tick ✓	No Tick ✓
LOGIN TO PLM		
INVITE TENANT FOR TRAINING		

13 NEXT STEPS

You will be required to complete the following:

	Training Evaluation
	Assessment



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