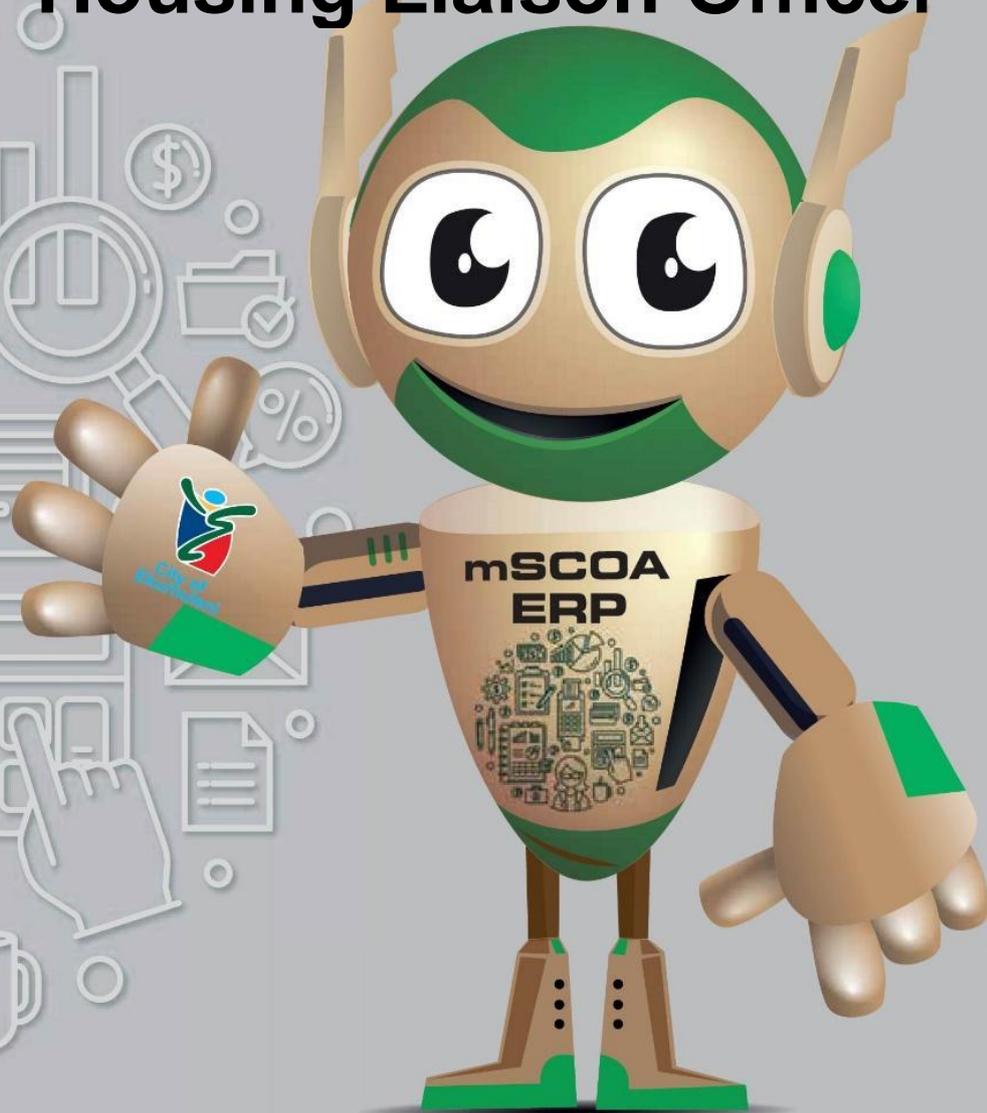


ERP Functional USER MANUAL

Training Manual Property Lease Management Human Settlement Housing Liaison Officer



OUR JOURNEY
TO A SMART DIGITAL CITY



TABLE OF CONTENTS

| | | |
|----|---|----|
| 1 | OVERVIEW..... | 2 |
| • | 1.1 INTRODUCTION..... | 2 |
| • | 1.2 mSCOA ERP | 4 |
| 2 | GENERAL SYSTEM INFORMATION | 5 |
| 3 | LEARNING REQUIREMENTS | 6 |
| 4 | LEARNING EXPECTATIONS | 6 |
| 5 | LEARNING JOURNEY | 7 |
| 6 | KEY AREAS OF LEARNING | 8 |
| 7 | LEARNING OUTCOMES..... | 8 |
| 8 | KEY ICONS WITHIN THE LEARNING MATERIAL..... | 9 |
| 9 | LOGIN TO PLM | 10 |
| 10 | SUBMITTING A LEASE APPLICATION FORM | 12 |
| 11 | ADDING AN OCCUPANT TO THE LEASE..... | 20 |
| 12 | TRANSFERRING A LEASE..... | 28 |
| 13 | RECOMMENDING FOR LEASE RENEWAL..... | 33 |
| 14 | ACCEPTING A LEASE RENEWAL | 37 |
| 15 | RENEW LEASE..... | 41 |
| 16 | GENERATING A LEASE AGREEMENT | 46 |
| 17 | SIGNING AN AGREEMENT OF LEASE..... | 50 |
| 18 | FINALIZE LEASE AGREEMENT | 55 |
| 19 | TENANT SERVING NOTICE..... | 61 |
| 20 | NOTICED AGREEMENTS..... | 64 |
| 21 | CONDUCT UNIT INSPECTION..... | 68 |
| 22 | CONDUCT UNIT VACATED INSPECTION | 75 |
| 23 | AGREEMENT OF LEASE TERMINATION | 79 |
| 24 | SENDING OUT A COMMUNICATION | 83 |
| 25 | LOG OFF | 87 |
| 26 | HELPFUL HINTS..... | 89 |
| 27 | ASSESSMENTS OF SPECIFIC LEARNING OUTCOMES | 90 |
| 28 | NEXT STEPS..... | 91 |

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 a 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 departments within the City. It uses and leverages on the implementation of technology to enable the City to deliver services effectively and efficiently.

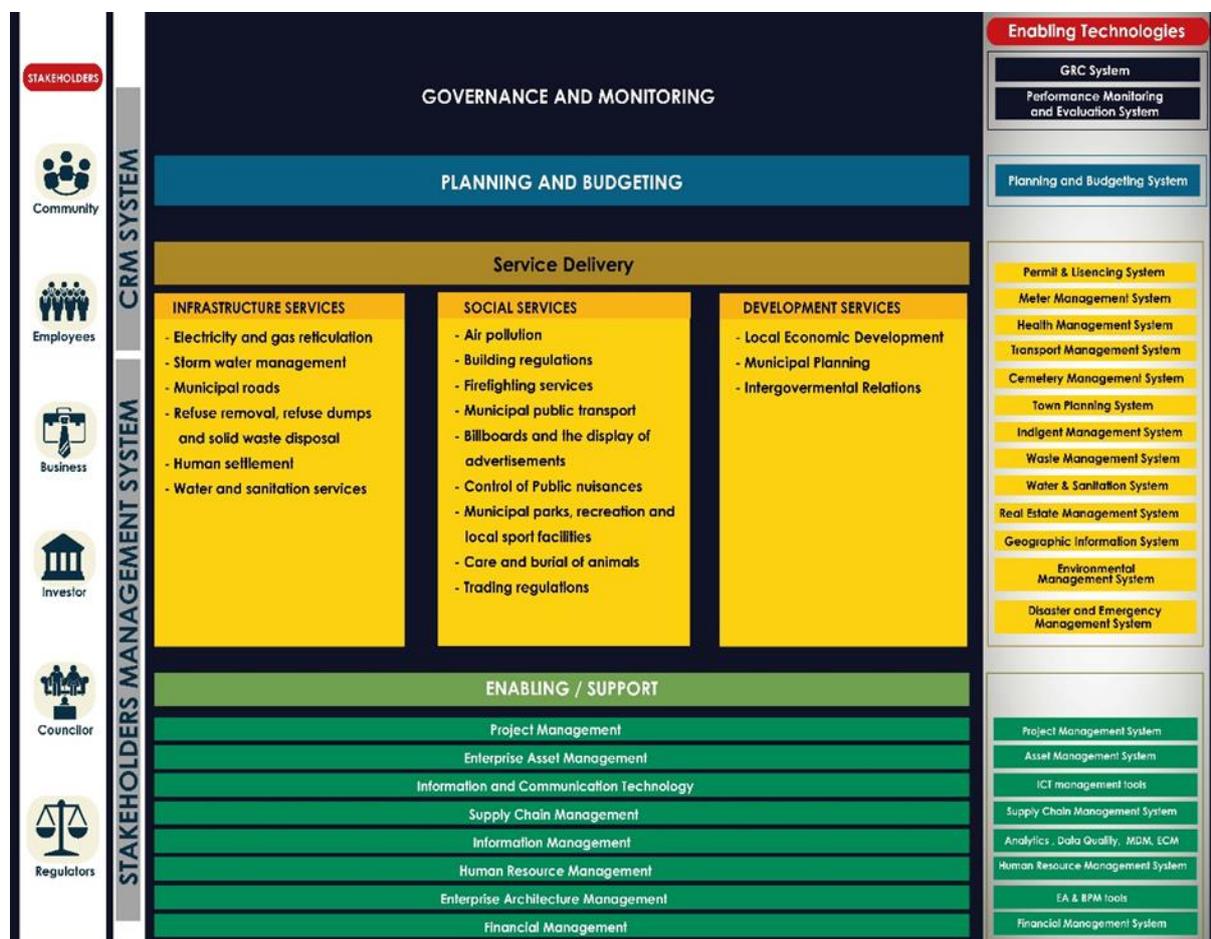


Figure 1: City Model

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.

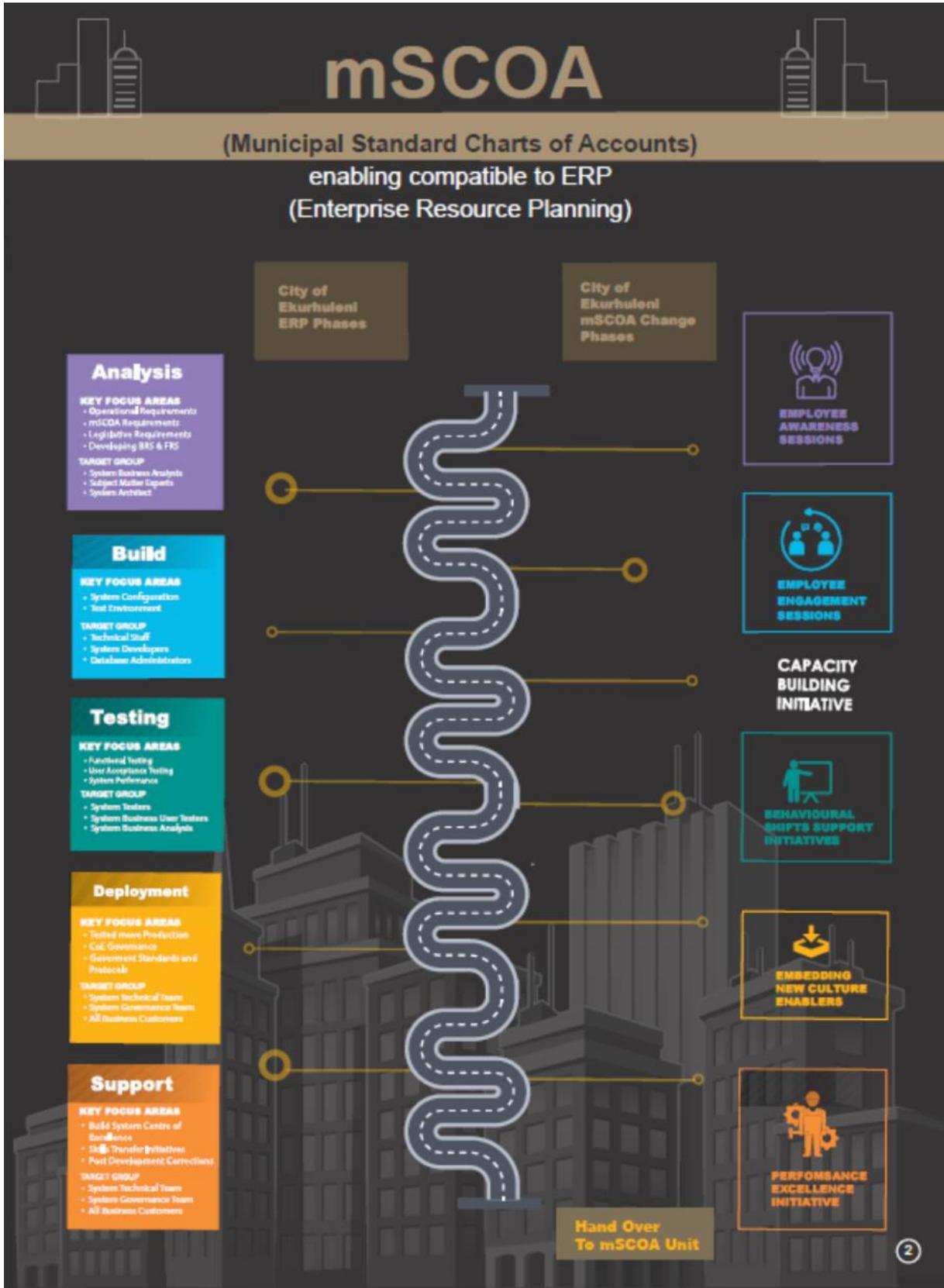
Strategy capability is responsible for all planning and budget related capability for the CoE municipality. Evaluating existing business unit strategy based on the company's strategy and eliminate unwanted/unnecessary resources/elements and re-consider necessary resources to meet the overall company's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

• 1.2 mSCOA ERP



2 GENERAL SYSTEM INFORMATION

Property Letting is one of the revenue generating streams within CoE. Human Settlement Department (HSD) - Community Services and Relationship Management is responsible for managing leasing of city owned properties reserved for the elderly (old age homes, cottages, and flats) and receiving pension or grant, as well as family units for those who have other sources of income. The division is also responsible for men and women hostels which are under the care of the city. HSD 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 HSD.

3 LEARNING REQUIREMENTS

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

- Computer literacy
- A good understanding of the Property Lease Management (PLM), Human Settlement Department system.

This User Guide is intended for the following audience:

- Housing Liaison Officer

4 LEARNING EXPECTATIONS

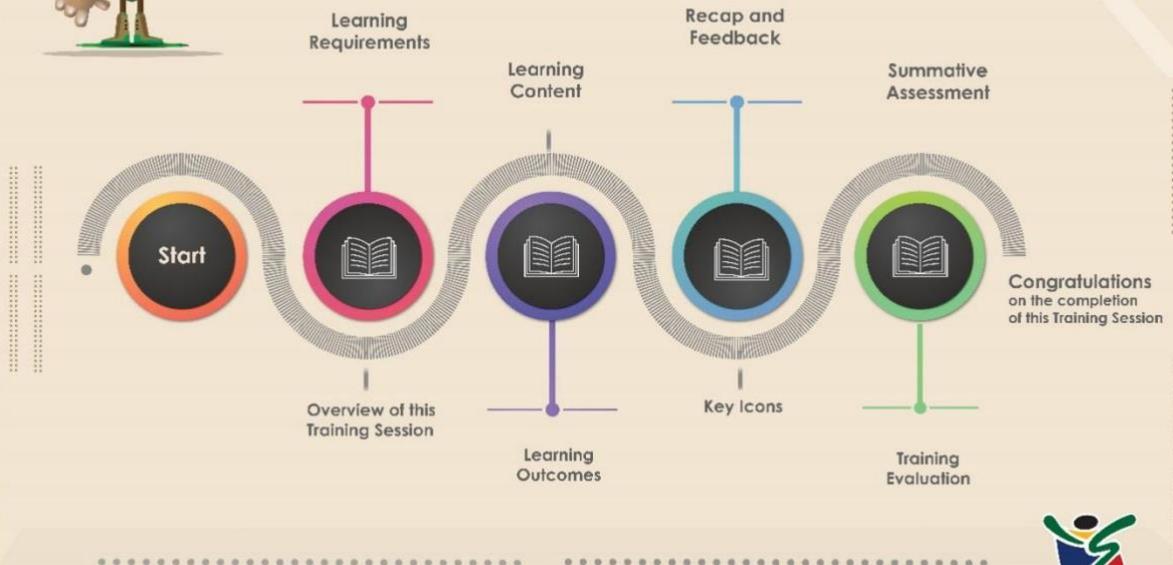
Understand System Concepts:

- System Login
- Submit Applications
- Document Uploads
- Signing Lease Agreement
- Renewing a Lease Agreement
- Conducting Inspections
- Terminating a Lease Agreement

5 LEARNING JOURNEY



Welcome mSCOA ERP Learner!



a partnership that works
www.ekurhuleni.gov.za



6 KEY AREAS OF LEARNING

| | |
|----|-------------------------------------|
| 1 | LOGIN TO PLM |
| 2 | SUBMITTING A LEASE APPLICATION FORM |
| 3 | ADDING AN OCCUPANT TO THE LEASE |
| 4 | TRANSFERRING A LEASE |
| 5 | RECOMMENDING FOR LEASE RENEWAL |
| 6 | ACCEPTING A LEASE RENEWAL |
| 7 | RENEW LEASE |
| 8 | GENERATING A LEASE AGREEMENT |
| 9 | SIGNING AN AGREEMENT OF LEASE |
| 10 | FINALIZE LEASE AGREEMENT |
| 11 | TENANT SERVING NOTICE |
| 12 | NOTICED AGREEMENTS |
| 13 | CONDUCT UNIT INSPECTION |
| 14 | CONDUCT UNIT VACATED INSPECTION |
| 15 | AGREEMENT OF LEASE TERMINATION |
| 16 | SENDING OUT A COMMUNICATION |
| 17 | LOG OFF |

7 LEARNING OUTCOMES

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

- Navigate the Property Lease Management (PLM) Human Settlement system.
- Learn how to access information in the system and actioning applications.

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 system.



The process begins when you as the Revenue Manager 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 navigation panel.
- Click on the **Sign In** item.
- You will be navigated to the **Sign In** page.

Screen



CoE PLM Landing Page - Profile

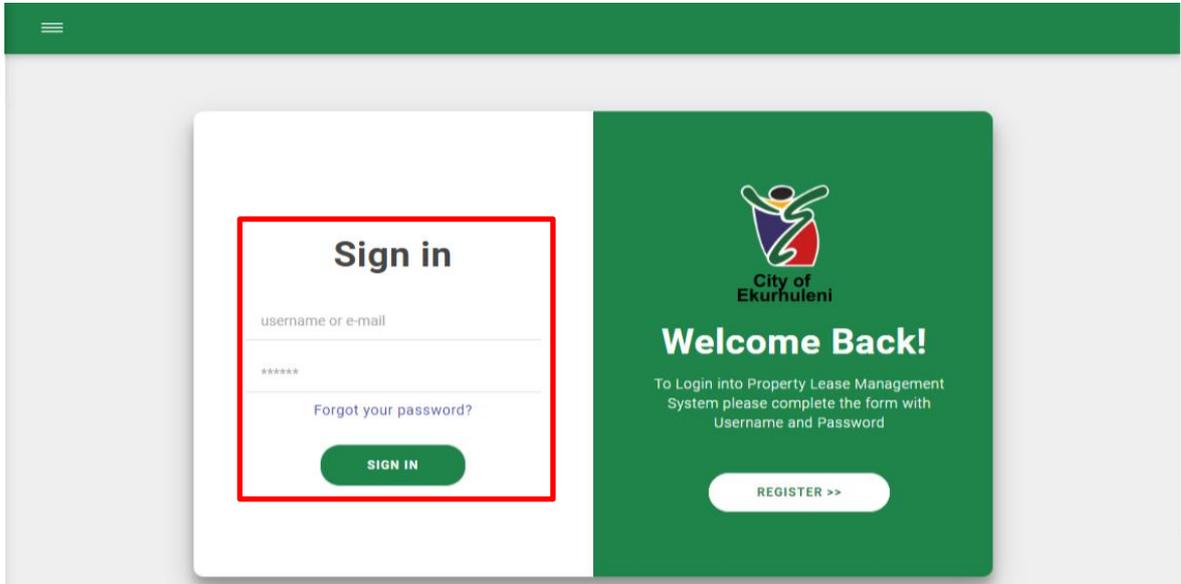
Navigate



On this screen:

- Enter your active directory **Username** and **Password**
- Click on the **Sign In** button

Screen



Sign In Page

You have now successfully completed this sub-section

10 SUBMITTING A LEASE APPLICATION FORM



After completing this sub-section, you will be able to successfully submit a property lease application on the PLM system.



You have the functionality to capture and submit a lease application on behalf of a walk-in customer.

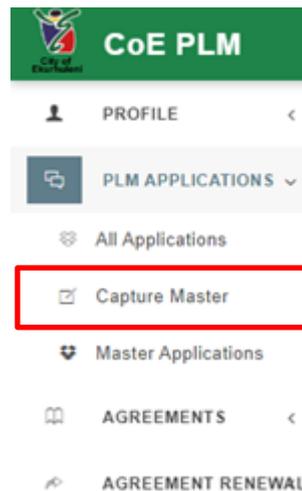
Navigate



On this screen:

- Click **PLM Applications** dropdown on the navigation panel.
- Click **Capture Master** to commence with capturing of the Lease Agreement.

Screen



Navigation Panel



- Under the **Tenant Information** tab, there will be multiple sub-sections which need to be capture, such as:
 - Tenants Details
 - Contact Details
 - Income Details
 - Current Address
- When **SASSA Grant** option is selected as the **Income Source**, the **SASSA Number** field will be unhidden for you to capture.

Navigate



On this screen:

- The **Tenant Type** will automatically be **Individual Type**
- Capture the First Name, Surname and ID Number
- The **Date of Birth** will pre-populate once you have entered the **ID number**.
- Input the Mobile Number
- Input the Email Address
- Select an **Income Source** option from the dropdown list:
 - Pension
 - Salary
 - SASSA Grant
- Capture the Gross Income and Nett Income
- The **Total Income** will pre-populate.
- Capture the Address, Suburb and Postal Code
- Click **Next** to proceed to the **Spouse Information** tab.

Screen

Instructions

1 Tenant Information 2 Spouse Information 3 Contact Person 4 Agreement Information

Tenant Details

Tenant Type Individual Application

First Name* Surname*

ID Number* Date of Birth*

Contact Details

Mobile Number* Email Address*

Tenant Information

Tenant Information



- The **Spouse Information** section is optional to complete.
- Once selected, additional fields will be unhidden.
- To skip this section, click **Next**.

Navigate



On this screen:

- Click **Profile** dropdown arrow on the navigation panel.
- Click on the **Sign In** item.
- Capture **First Name**
- Capture **Last Name**
- Select **Gender**
- Select **Title**
- Select **Nationality** and additional fields will be unhidden.
- Input your **ID Number**
- Tick check box **Nominate for Take-Over?** if the applicant wants to transfer the lease over to the spouse at a later stage.

Screen

Instructions

1 Tenant Information ⓘ 2 Spouse Information ⓘ 3 Contact Person ⓘ 4 Agreement Information ⓘ

Spouse Details

Spouse Information?

Cancel Previous Next

Spouse Information

Instructions

1 Tenant Information ⓘ 2 Spouse Information ⓘ 3 Contact Person ⓘ 4 Agreement Information ⓘ

Spouse Details

Spouse Information?

First Name* _____ Last Name* _____

Gender* -- Select Option - v Title* -- Select Option - v

Nationality* -- Select Option - v

Nationality* South African v

ID Number* _____ Nominate For Take-Over?

Spouse Information

Addition Fields - Spouse Information



- Click **Profile** dropdown arrow on the navigation panel.
- Click on the **Sign In** item.
- When **SASSA Grant** option is selected as the **Income Source**, the **SASSA Number** field will be unhidden for you to capture.
- The **Total Income** from the applicant will reflect and will be automatically calculated with the spouse's income.

Navigate



On this screen:

- Input the **Contact Number** and **Email Address**
- Select an **Income Source** option from the dropdown list:
 - Pension
 - Salary
 - SASSA Grant
- Click **Profile** dropdown arrow on the navigation panel.
- Click on the **Sign In** item.
- Capture the **Gross Income** and **Nett Income**
- The **Total Income** will be calculated.
- Under **Current Address**, capture the following:
 - Address
 - Suburb
 - Postal Code
- Click **Next** to proceed to the **Contact Persons** tab.

Screen

Spouse Information

Navigate



On this screen:

- Click **Profile** dropdown arrow on the navigation panel.
- Click on the **Sign In** item.
- Capture the **First Name** and **Last Name**
- Select the **Relationship** and **Title** from the dropdown list.
- Input the **Mobile Number** and **Email**
- Click **Next** to proceed to the **Agreement Information** tab.

Screen

Contact Person



- Under the **Agreement Information** tab, there will be multiple sub-sections which need to be capture, such as:
 - Space Unit Details
 - Leasing Period
 - Communication
 - Billing Information

Navigate



On this screen:

- Select the **Complex/Area** from the dropdown list
- Capture the **Space/ Unit No.**
- Capture the **Solar Ref.**
- Select the following:
 - Income Brackets (eg. R4000 to R5500)
 - Category (eg. Family Unit)
 - Typology (eg. 1 Bedrooms)
- Under the **Leasing Period**, capture the **Start Date**
- The **End Date**, **Renewal Notice** and **Termination Notice** dates will be automated.
- Tick the checkbox of the **Communication Method** which is either **Email** or **SMS**
- **Rental Amount** and **Deposit Amount** fields will be pre-populated based on the **Space Unit details** selected.
- Capture the following:
 - Store Rooms
 - Shade Port Parking
 - Open Parking
 - Open Parking Bay
- Click on the **Submit** button.
- You will be navigated to the **Master Applications Page**.
- A popup will display a **Successfully Captured** notification with the reference number.

Screen

Instructions

1 Tenant Information 2 Spouse Information 3 Contact Person 4 Agreement Information

Space Unit Details

Complex/Area* --Select Option--
 Space/Unit No.* Solar Ref.*
 Income Brackets* --Select Option-- Category* --Select Option-- Typology* --Select Option--

Leasing Period

Start Date* yyyy/mm/dd
 End Date yyyy/mm/dd Renewal Notice yyyy/mm/dd Termination Notice yyyy/mm/dd

Agreement Information

Communication

Communication Method Email SMS

Billing Information

Rental Amount (Incl VAT)* 0,00 Deposit Required* 0,00 Store Rooms*
 Shade Port Parking* Open Parking* Open Parking Bay*

Cancel Previous **Submit**

Agreement Information

CoE PLM

Successfully Captured

Master Lease has been captured successfully, the reference no HSD2022111100001, it is currently Property Lease Application Completed

OK

| AGREEMENT RENEWAL | Applicant Name | Type | Number | Created Date | Status | Action |
|-------------------|-----------------|------------------------|------------------|-----------------------|----------------------------|--------|
| COMMUNICATION | Alondwe Ngxongo | Individual Application | HSD2022100400001 | 2022/10/04 9:08:32 AM | Applicant Vacated The Unit | View |

Success Captured Notification



After capturing the application, the lease will be activated. Only when you are renewing the lease, would you be able to generate and update the lease.

You have now successfully completed this sub-section

11 ADDING AN OCCUPANT TO THE LEASE



After completing this sub-section, you will be able to add an occupant to the lease.



Adding an occupant to the lease is optional.

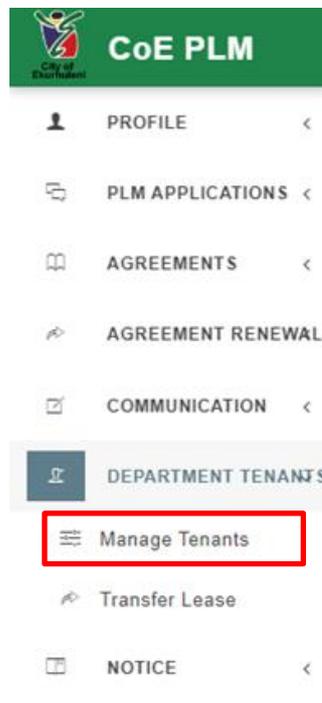
Navigate



On this screen:

- Click **Department Tenants** dropdown arrow on the navigation panel.
- Click **Manage Tenants**
- You will be navigated to the **Tenants Active Leases** page.
- Click on the **Manage** button on the line item of choice.
- You will be navigated to the **Tenant Management** page.

Screen



Navigation Panel

| TENANTS ACTIVE LEASES | | | | | |
|-----------------------|-----------------|------------------------|---------------------------|----------------------------------|------------------------|
| Lease Reference No. | Tenant Name | Application Type | Lease Date | Status | Action |
| HSD2022111100001 | Freddy Sithole | Individual Application | 2022/11/11 1:36:49 PM | Active Lease | Manage |
| HSD2022110800001 | RYAN poonsamy | Individual Application | 2022/11/08 10:43:45 AM | Active Lease | Manage |
| HSD2022110700003 | shevek poonsamy | Individual Application | 2022/11/07 2:22:42 PM | Termination Due To Tenant Notice | Manage |
| HSD2022110700002 | shevek poonsamy | Individual Application | 2022/11/07 1:14:07 PM | Active Lease | Manage |
| HSD2022110700001 | Nicole poonsamy | Individual Application | 2022/11/07 11:55:28 AM | Active Lease | Manage |

Tenant Active Leases Page

Navigate



On this screen:

- Capture the **First Name** and **Last Name**
- Input the **Relationship** to the tenant
- Tick checkbox **Nominated**
- Input the **Identification Number**
- Select the **Title** from the dropdown list.
- Input the **Cell No.** and **Email**
- Click on the **Add Occupant** button

Screen

Tenant Management

Add New Occupant

First Name* _____ Last Name* _____

Relationship* _____ Nominated

Identification Number* _____ Title* -- Select Option - v

Cell No. _____ Email _____

Add Occupant

Return To Manage

Tenant Management

Navigate



On this screen:

- A confirmation popup box will display, **Are you sure you want to add this occupant?** Click **Yes, I am sure!** to acknowledge.
- A success popup box will display, **Agreement Occupant Added Successfully.** Click **OK** to remove popup.

Screen

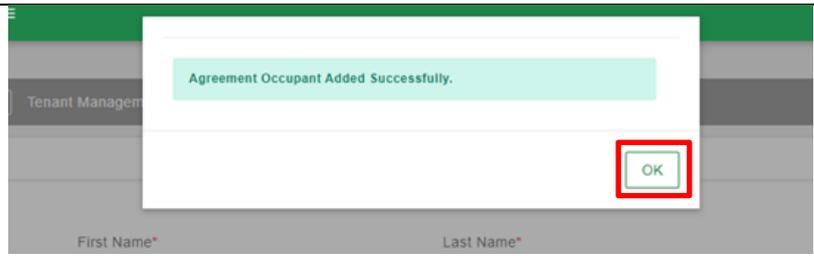
Tenant Management

Are you sure you want to add this occupant?

No! **Yes, I am sure!**

Add Occupant

Confirmation Popup



Success Notification



- The occupant details which were just saved will be display in the **List of Active Occupant/s**.
- An occupant can be deactivated on the lease by clicking on the **Deactivate** action button.

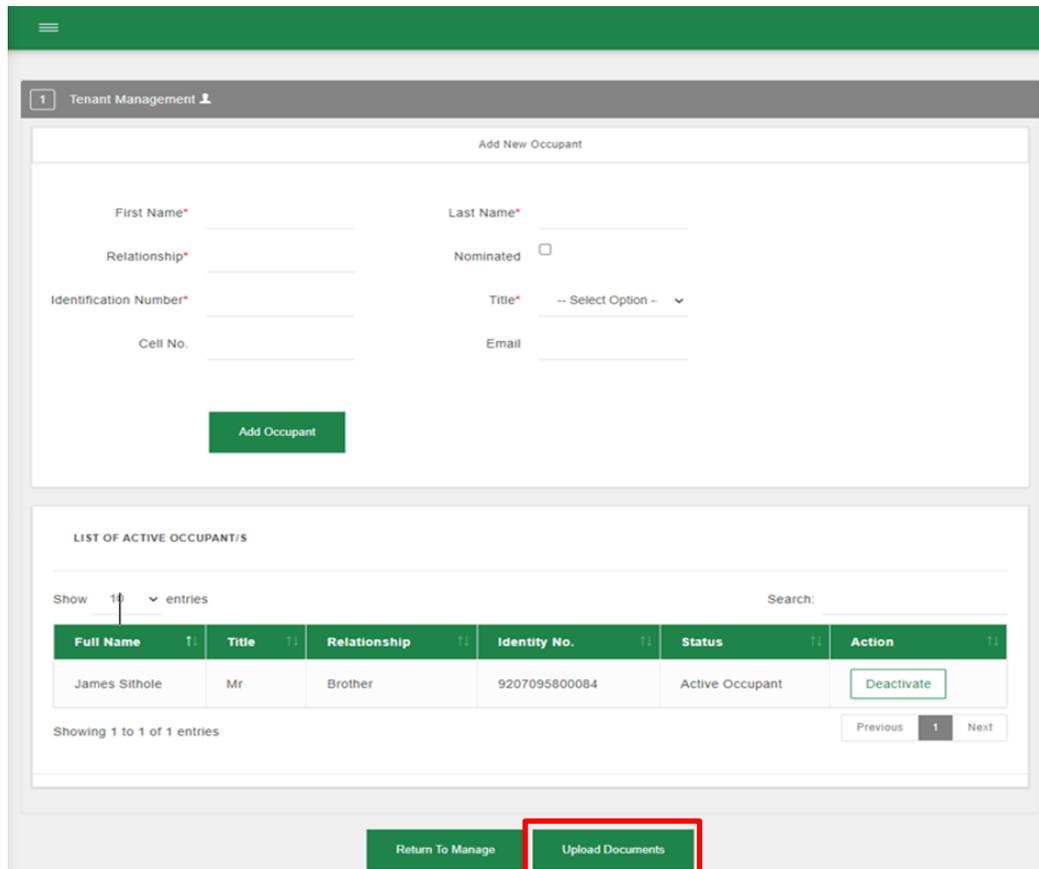
Navigate



On this screen:

- Click on the **Upload Documents** button.
- You will be navigated to the **Documents Upload** page.

Screen



Tenant Management Page

Navigate



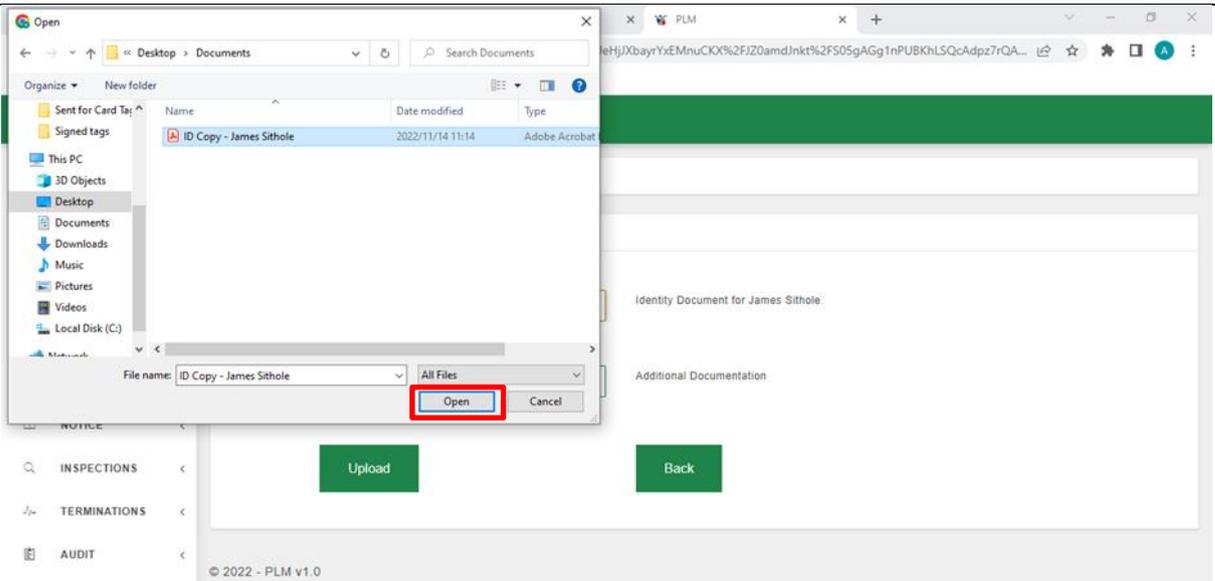
On this screen:

- Click on the **Browse** button.
- Select the necessary document from your computer files.
- Click on the **Open** button.
- The document will be attached. (The document name will reflect next to the browse button)
- Click **Upload** to proceed with the upload.
- A popup notification will display: **Document(s) Uploaded.**
- Click **Ok** to remove popup box.
- The document name will change from black text to blue.
- Repeat the above steps to upload an **Additional Document** (optional).
- Click on the **Back** button.
- You will be navigated to the **Tenant Management** page.

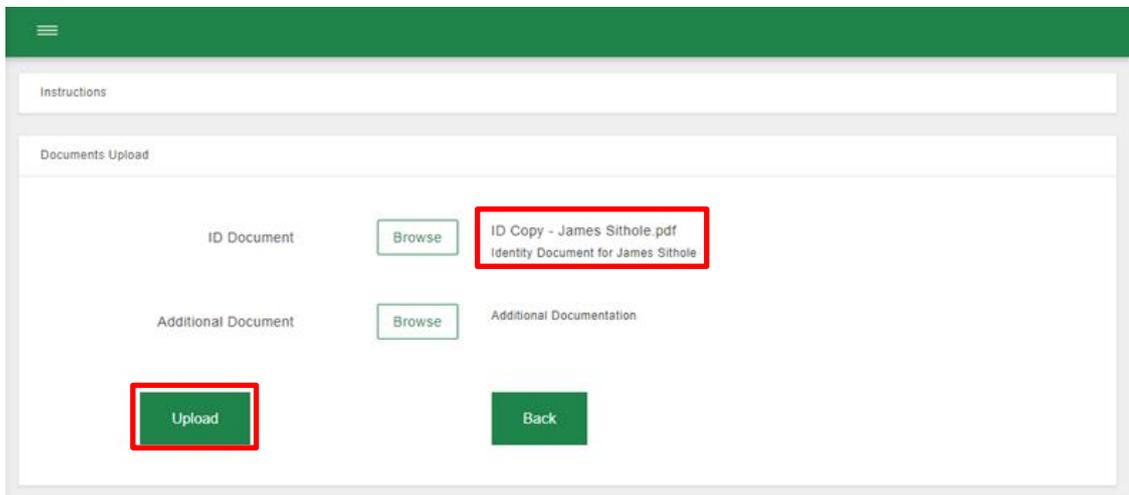
Screen

A screenshot of a web application interface. At the top is a green header with a white hamburger menu icon. Below the header is a white box labeled 'Instructions'. Underneath is another white box labeled 'Documents Upload'. This box contains two rows of document upload options. The first row has 'ID Document' on the left, a 'Browse' button in the center (highlighted with a red square), and 'Identity Document for James Sithole' on the right. The second row has 'Additional Document' on the left, a 'Browse' button in the center, and 'Additional Documentation' on the right. At the bottom of the 'Documents Upload' box are two green buttons: 'Upload' on the left and 'Back' on the right. Below the screenshot is a footer with the text '© 2022 - PLM v1.0'.

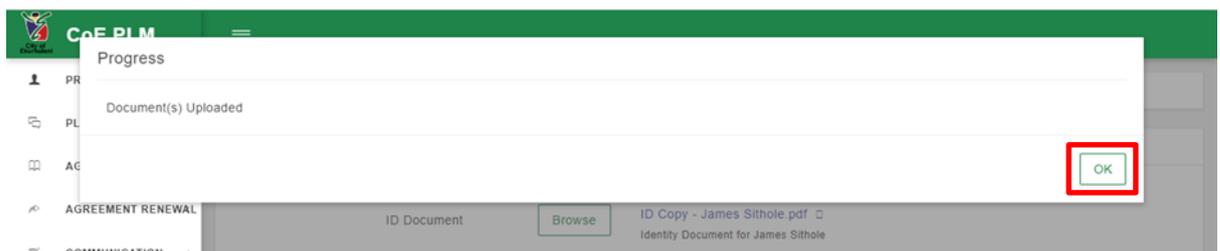
Documents Upload Page



Selecting Document from Computer Files



Documents Attached



Progress Popup – Documents Uploaded

Uploaded Document

Navigate



On this screen:

- On the **Tenant Management** page, Click **Return to Manage**.
- You will be navigated to the **Tenants Active Leases** page.

Screen

LIST OF ACTIVE OCCUPANT/S

Show 10 entries Search:

| Full Name | Title | Relationship | Identity No. | Status | Action |
|---------------|-------|--------------|---------------|-----------------|------------|
| James Sithole | Mr | Brother | 9207095800084 | Active Occupant | Deactivate |

Showing 1 to 1 of 1 entries

Previous 1 Next

Return To Manage Upload Documents

© 2022 - PLM v1.0

Tenant Management Page

| TENANTS ACTIVE LEASES | | | | | |
|-----------------------|-----------------|------------------------|------------------------|----------------------------------|------------------------|
| Show 10 entries | | Search: | | | |
| Lease Reference No. | Tenant Name | Application Type | Lease Date | Status | Action |
| HSD2022111400001 | Siyanda Ngxongo | Individual Application | 2022/11/14 10:02:17 AM | Active Lease | Manage |
| HSD2022111100001 | Freddy Sithole | Individual Application | 2022/11/11 1:36:49 PM | Active Lease | Manage |
| HSD2022110800001 | RYAN poonsamy | Individual Application | 2022/11/08 10:43:45 AM | Active Lease | Manage |
| HSD2022110700003 | shevek poonsamy | Individual Application | 2022/11/07 2:22:42 PM | Termination Due To Tenant Notice | Manage |
| HSD2022110700002 | shevek poonsamy | Individual | 2022/11/07 | Active Lease | Manage |

Tenants Active Leases

You have now successfully completed this sub-section

12 TRANSFERRING A LEASE



After completing this sub-section, you will be able to transfer the lease from the tenant to the spouse/ occupant.



A lease can be transferred in the event of:

- Unemployment/ Other Reasons (transferring to Spouse or another Person)
- Tenant Deceased

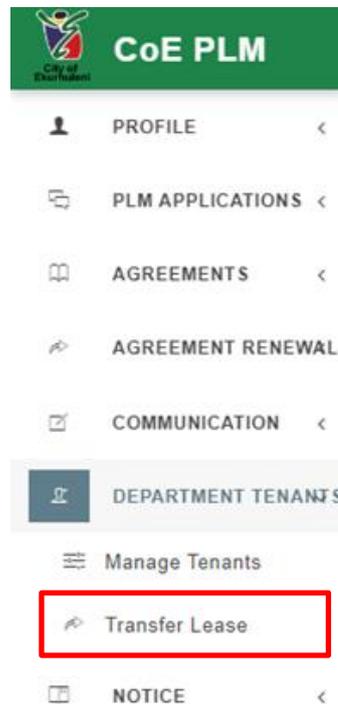
Navigate



On this screen:

- Click **Department Tenants** dropdown arrow on the navigation panel.
- Click **Transfer Lease**
- You will be navigated to the **Agreement of Lease Transfer** page.

Screen



Navigation Panel

Navigate



On this screen:

- Input the **Application Reference Number**
- Click **Submit**
- A confirmation popup box will display, **Are you sure you want to search this application?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Application Lease Information** page.

Screen

Agreement of Lease Transfer Page

Confirmation Popup



Reason for Transfer:

- If option Other is selected, an additional checkbox field (Make main tenant an occupant?) will appear.
- Ticking checkbox “Make main tenant an occupant?” signifies that the tenant will be noted as an occupant after submitting the transfer of the lease. (Not ticking the checkbox, means the initial tenant will not be on the occupant list)

Preference:

- When an occupant other than the spouse is chosen and the contact number was not captured for this occupant, an additional field will appear for you to input the mobile number.

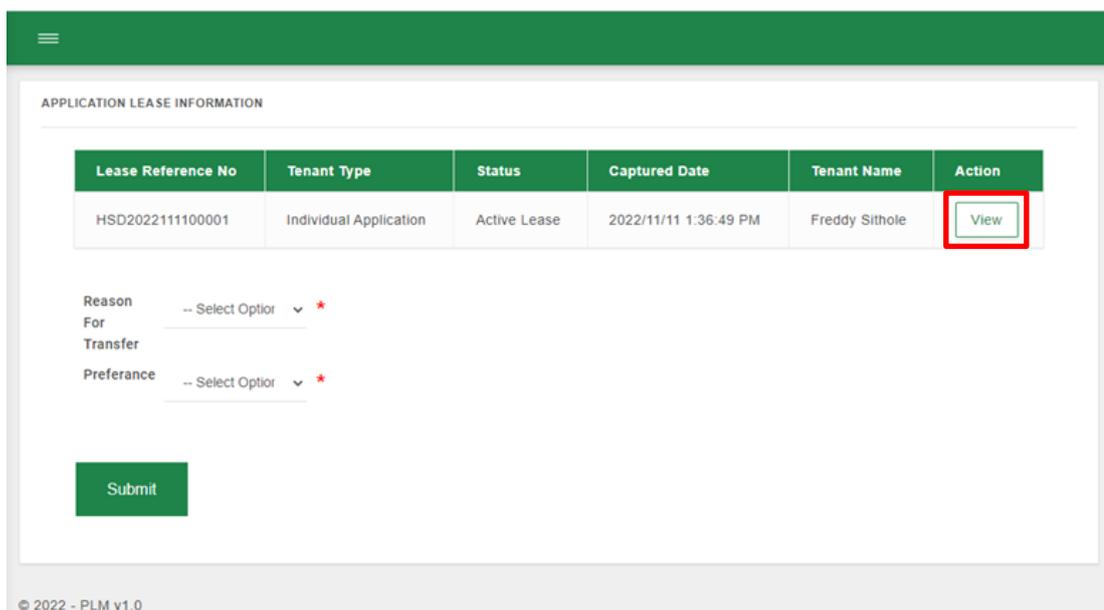
Navigate

On this screen:



- Clicking on the **View** button gives you access to view information on the lease, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents
- Select a **Reason for Transfer** from the dropdown list, such as:
 - Tenant Deceased
 - Other
- Select a **Preference**
- Tick checkbox **Make main tenant an occupant?**
- Click on the **Submit** button

Screen



APPLICATION LEASE INFORMATION

| Lease Reference No | Tenant Type | Status | Captured Date | Tenant Name | Action |
|--------------------|------------------------|--------------|-----------------------|----------------|----------------------|
| HSD2022111100001 | Individual Application | Active Lease | 2022/11/11 1:36:49 PM | Freddy Sithole | View |

Reason For Transfer: -- Select Option *
Preference: -- Select Option *

© 2022 - PLM v1.0

Application Lease Information Page

APPLICATION LEASE INFORMATION

| Lease Reference No | Tenant Type | Status | Captured Date | Tenant Name | Action |
|--------------------|------------------------|--------------|-----------------------|----------------|----------------------|
| HSD2022111100001 | Individual Application | Active Lease | 2022/11/11 1:36:49 PM | Freddy Sithole | View |

Reason For Transfer: Other

Preference: James Sithole

Make main tenant an occupant?

Submit

Application Lease Information Page

Navigate



On this screen:

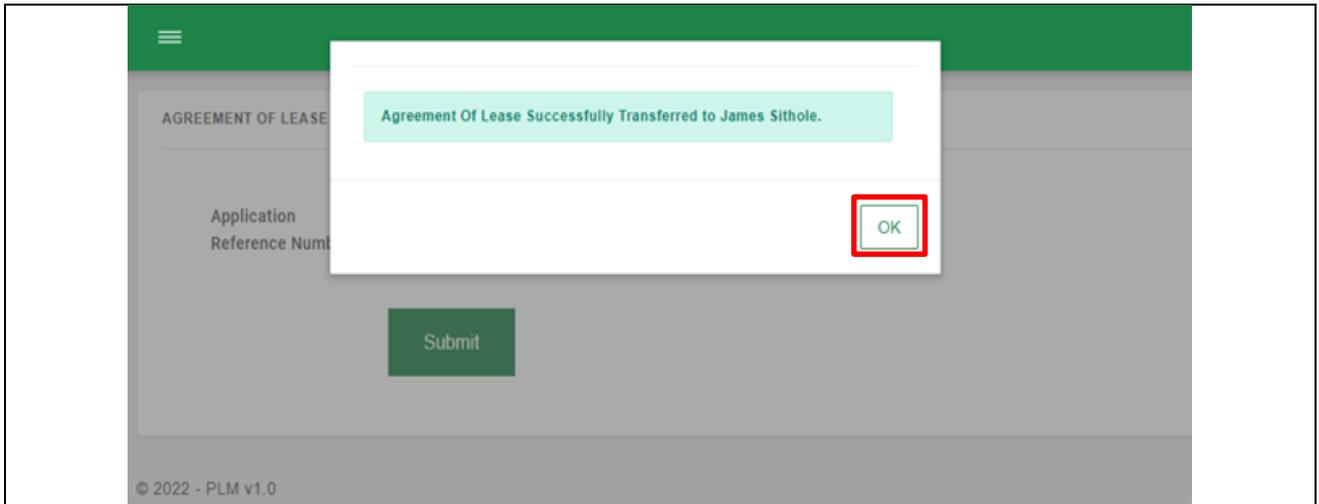
- A confirmation popup box will display: **Are you sure you want to submit this recommendation?** Click **Yes, I am sure!** to acknowledge.
- A success popup box will display, **Agreement of Lease Successfully Transferred to (New Tenants Name)**. Click **OK** to remove popup.

Screen

Are you sure you want to submit this recommendation?

No! **Yes, I am sure!**

Confirmation Popup



Success Notification

You have now successfully completed this sub-section

13 RECOMMENDING FOR LEASE RENEWAL



After completing this sub-section, you will be able to recommend for a lease renewal.



- The tenant lease is due to lapse in the next 3 months, and the tenant qualifies for renewal.
- Lease Status: In Awaiting Agreement of Lease Renewal Review

Navigate



On this screen:

- Click **Renewal Recommendation** on the Dashboard.
 - You will be navigated to the **Awaiting Agreement Recommendation** page.
- OR
- Click **Agreement Renewal** dropdown arrow on the navigation panel.
 - Click **Recommendations**
 - You will be navigated to the **Awaiting Agreement Recommendation** page.

Screen

CoE PLM

HUMAN SETTLEMENT DASHBOARD - HOUSING LIAISON OFFICER
Wednesday, February 15, 2023 - 11:06:05

| | | | |
|------------------------|---------------------------|-----------------------|------------------------|
| 52 All Applications | 44 Master Applications | 8 New Applications | 9 Signed Agreements |
|------------------------|---------------------------|-----------------------|------------------------|

PERSONALIZED DASHBOARD CARDS

| | | | |
|--|---|---|--|
| 15 Recieved / 13 Completed Renewal Reccomend... 2 | 11 Recieved / 8 Completed Renewal Acceptance 3 | 8 Recieved / 8 Completed Renewal Documents 0 | 12 Recieved / 10 Completed Generate Agreement 2 |
| 6 Recieved / 6 Completed Agreement Signature 0 | 11 Recieved / 5 Completed Finalized Agreements 6 | 4 Recieved / 4 Completed Update Agreement 0 | 13 Recieved / 10 Completed Noticed Agreements 3 |

Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Review** button on the line item of choice.
- You will be navigated to the respective page.

Screen

AWAITING AGREEMENT RECOMMENDATION

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|-----------------|------------------------|------------------------------|------------------------|---|------------------------|
| Goody Kwinda | Individual Application | HSD2022091300001 | 2022/09/13 9:36:04 AM | In Awaiting Agreement of Lease Renewal Review | Review |
| James Sithole | Individual Application | HSD2022111100001 | 2022/11/11 1:36:49 PM | In Awaiting Agreement of Lease Renewal Review | Review |
| NAEEN Chetty | Individual Application | HSD2022092300003 | 2022/09/23 8:41:48 PM | In Awaiting Agreement of Lease Renewal Review | Review |
| Nicole poonsamy | Individual Application | HSD2022100600005 | 2022/10/06 2:38:31 PM | In Awaiting Agreement of Lease Renewal Review | Review |
| Ryan Pillay | Individual Application | HSD2022091300005 | 2022/09/13 3:35:07 PM | In Awaiting Agreement of Lease Renewal Review | Review |

Awaiting Agreement Recommendation Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents
- Tenant Account Balance and Complaints Against Tenant sub-sections are also viewable.

Navigate



On this screen:

- Select an **Outcome** from the dropdown list:
 - Not Renew
 - Renew for 24 months

- Input a **Comment** in the field provided.
- Click on the **Submit** button

Screen

EVALUATING APPLICATION

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|----------------|------------------------|------------------------------|------------------------|---|-------------|
| James Sithole | Individual Application | HSD2022111100001 | 2022/11/11 1:36:49 PM | In Awaiting Agreement of Lease Renewal Review | View |

Showing 1 to 1 of 1 entries Previous 1 Next

TENANT ACCOUNT BALANCE

| Deposit Amount Paid | Amount Due |
|---------------------|------------|
|---------------------|------------|

Recommend for Lease Renewal

COMPLAINTS AGAINST TENANT

| Complaint Date | Comment | Complaint By |
|----------------|---------|--------------|
|----------------|---------|--------------|

Outcome -- Select Option *

Comment *

Submit

© 2022 - PLM v1.0

Recommend for Lease Renewal

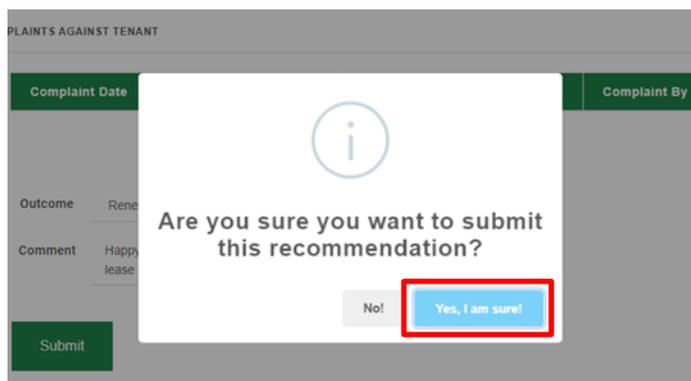
Navigate



On this screen:

- A confirmation popup box will display, **Are you sure you want to submit this recommendation?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Awaiting Agreement Recommendations** page.

Screen



Confirmation Popup



The lease will be sent to the Senior Housing Specialist for viewing and actioning.

You have now successfully completed this sub-section

14 ACCEPTING A LEASE RENEWAL



After completing this sub-section, you will be able to Accept the Lease Renewal on behalf of the tenant (walk-in).



Once the lease renewal is approved by the regional manager, the lease renewal will be sent to the Housing Liaison Officer to accept the lease renewal.



- The customer/tenant is required to Accept/ Reject the Renewal of the Lease Agreement by either using SMS with the OTP or the Email with the link.
- Should you customer not be able to action the Renewal Lease Agreement using the self-service, she or he will need to visit the offices and the Housing Liaison Officer will action it on the system on their behalf.

Navigate



On this screen:

- Click **Renewal Acceptance** on the Dashboard.
- You will be navigated to the **Awaiting Renewal Acceptance** page.

OR

- Click **Agreement Renewal** dropdown arrow on the navigation panel.
- Click **Pending Acceptance**
- You will be navigated to the **Awaiting Renewal Acceptance** page.

Screen

CoE PLM

HUMAN SETTLEMENT DASHBOARD - HOUSING LIAISON OFFICER
Wednesday, February 15, 2023 - 11:05:22

52 All Applications | 44 Master Applications | 8 New Applications | 9 Signed Agreements

PERSONALIZED DASHBOARD CARDS

15 Recieved 13 Completed | 11 Recieved 8 Completed | 8 Recieved 8 Completed | 12 Recieved 10 Completed
Renewal Reccomend... 2 | Renewal Acceptance 3 | Renewal Documents 0 | Generate Agreement 2

6 Recieved 6 Completed | 11 Recieved 5 Completed | 4 Recieved 4 Completed | 13 Recieved 10 Completed
Agreement Signature 0 | Finalized Agreements 6 | Update Agreement 0 | Noticed Agreements 3

Navigation and Dashboard

Navigate



On this screen:

- Click **Review** button on the line item of choice.
- You will be navigated to the respective page.

Screen

AWAITING RENEWAL ACCEPTANCE

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|-----------------|------------------------|------------------------------|------------------------|---------------------------------------|------------------------|
| Comfort v Maja | Individual Application | HSD2022110200002 | 2022/11/02 10:18:35 AM | In Awaiting Tenant Renewal Acceptance | Review |
| James Sithole | Individual Application | HSD2022111100001 | 2022/11/11 1:36:49 PM | In Awaiting Tenant Renewal Acceptance | Review |
| Shevek Poonsamy | Individual Application | HSD2022091500002 | 2022/09/15 9:28:41 AM | In Awaiting Tenant Renewal Acceptance | Review |
| shevek poonsamy | Individual Application | HSD2022092600004 | 2022/09/26 10:48:25 AM | In Awaiting Tenant Renewal Acceptance | Review |
| shevek poonsamy | Individual Application | HSD2022092600006 | 2022/09/26 2:26:56 PM | In Awaiting Tenant Renewal Acceptance | Review |
| shevek | Individual | | 2022/09/29 2:20:49 | In Awaiting Tenant | Review |

Awaiting Renewal Acceptance Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate



On this screen:

- Select **Action** as **Approved**
- Input the **One Time Pin** provided by the customer
- Click on the **Verify** button

Screen

EVALUATING APPLICATION

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|----------------|------------------------|------------------------------|------------------------|---------------------------------------|-------------------------------------|
| James Sithole | Individual Application | HSD2022111100001 | 2022/11/11 1:36:49 PM | In Awaiting Tenant Renewal Acceptance | <input type="button" value="View"/> |

Showing 1 to 1 of 1 entries

ACTION -- Select Option *

ONE TIME PIN *

© 2022 - PLM v1.0

Accepting a Lease Renewal

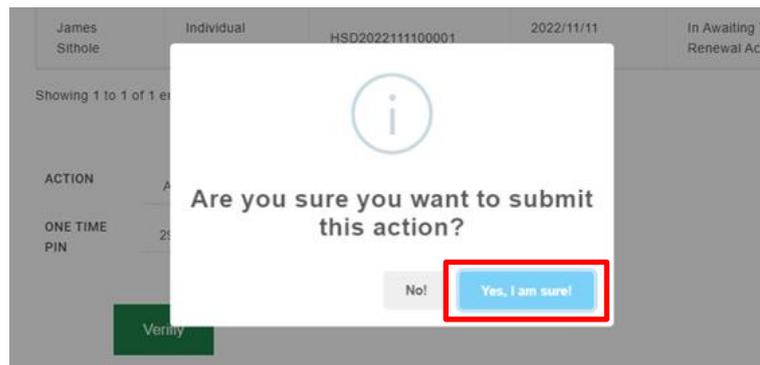
Navigate



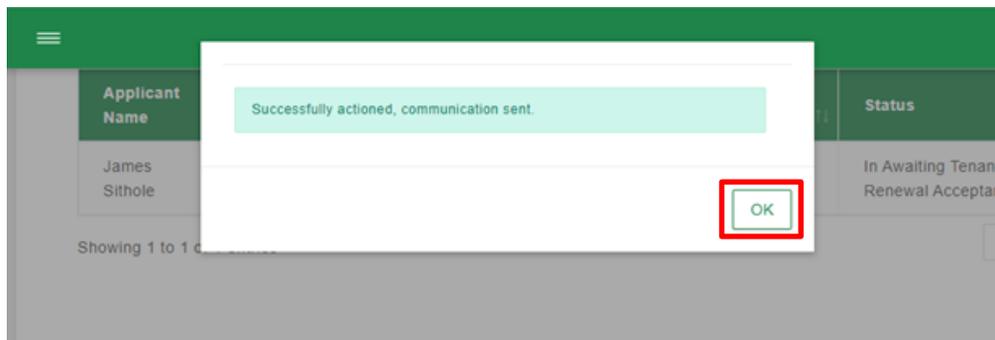
On this screen:

- A confirmation popup box will display, **Are you sure you want to submit this action?** Click **Yes, I am sure!** to acknowledge.
- A success popup box will display, **Successfully actioned, communication sent.** Click **OK.**
- You will be navigated to the **Awaiting Renewal Acceptance** page.

Screen



Confirmation Popup



Success Notification



The status will be updated to “In Awaiting Agreement of Lease Renewal” and the lease will move to the Awaiting Agreement Renewal queue.

You have now successfully completed this sub-section

15 RENEW LEASE



After completing this sub-section, you will be able to renew a lease by uploading all documents.



To upload renewal documents, the status must be "In Awaiting Agreement of Lease Renewal".

Navigate



On this screen:

- Click **Renewal Documents** on the Dashboard.
- You will be navigated to the **Awaiting Agreement Renewal** page.

OR

- Click **Agreement Renewal** dropdown arrow on the navigation panel.
- Click Pending Renewal
- You will be navigated to the **Awaiting Agreement Renewal** page.

Screen

The screenshot displays the CoE PLM Human Settlement Dashboard for a Housing Liaison Officer. The dashboard includes a navigation panel on the left with the following items: PROFILE, PLM APPLICATIONS, AGREEMENTS, AGREEMENT RENEWAL (expanded), Recommendations, Pending Acceptance, Pending Renewal (highlighted with a red box), COMMUNICATION, DEPARTMENT TENANTS, NOTICE, INSPECTIONS, TERMINATIONS, and AUDIT. The main dashboard area shows a title 'HUMAN SETTLEMENT DASHBOARD - HOUSING LIAISON OFFICER' and a date 'Wednesday, February 15, 2023 - 10:26:23'. Below the title are four summary cards: All Applications (52), Master Applications (44), New Applications (8), and Signed Agreements (9). The 'PERSONALIZED DASHBOARD CARDS' section contains several cards with 'Recieved' and 'Completed' counts. The 'Renewal Documents' card (8 Recieved, 8 Completed) is highlighted with a red box. Other cards include 'Renewal Reccomend...' (15 Recieved, 13 Completed), 'Renewal Acceptance' (11 Recieved, 8 Completed), 'Generate Agreement' (12 Recieved, 10 Completed), 'Agreement Signature' (6 Recieved, 6 Completed), 'Finalized Agreements' (11 Recieved, 5 Completed), 'Update Agreement' (4 Recieved, 4 Completed), and 'Noticed Agreements' (13 Recieved, 10 Completed).

Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Renewal Documents** button on the line item of choice.
- You will be navigated to the respective page.

Screen

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|----------------|------------------------|------------------------------|------------------------|--|-------------------|
| James Sithole | Individual Application | HSD2022111100001 | 2022/11/11 1:36:49 PM | In Awaiting Agreement of Lease Renewal | Renewal Documents |

Awaiting Agreement Renewal Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate

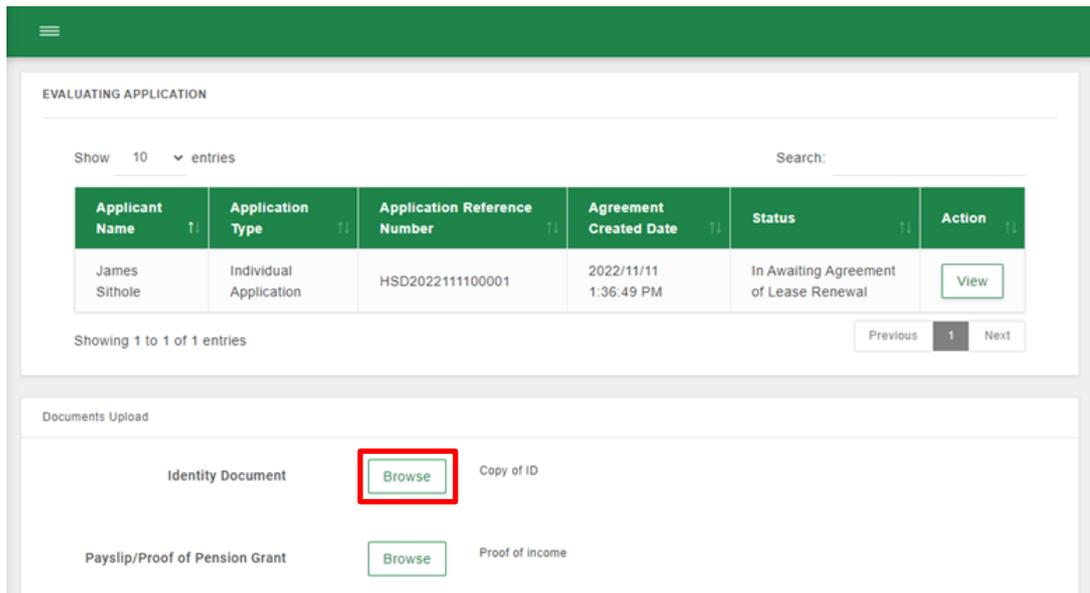


On this screen:

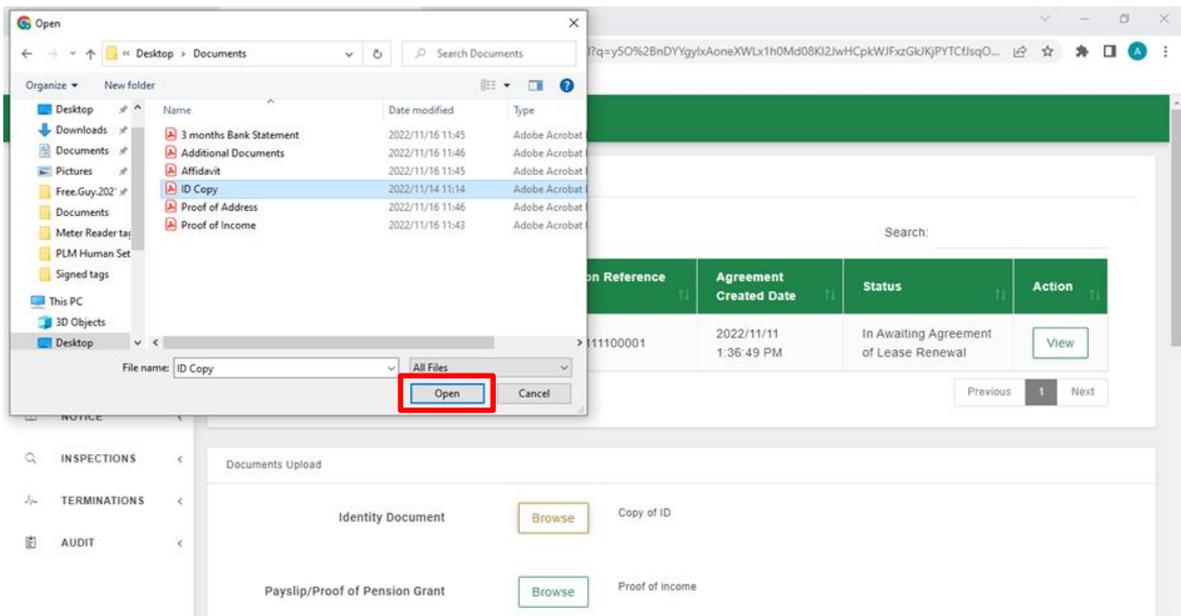
- Click on the **Browse** button.
- Select the necessary document from your computer files.
- Click on the **Open** button.
- The document will be attached. (The document name will reflect next to the browse button)
- Click **Upload** to proceed with the upload.

- A popup notification will display: **Document(s) Uploaded.**
- Click **Ok** to remove popup box.
- The document name will change from black text to blue.
- Repeat the above steps to upload all documents.
- Click on the **Finish** button.
- You will be navigated to the **Awaiting Agreement Renewal** page.

Screen



Documents Upload



Selecting Document from Computer Files

Documents Upload

| | | |
|--------------------------------|---------------------------------------|---------------------------|
| Identity Document | <input type="button" value="Browse"/> | ID Copy.pdf Copy of ID |
| Payslip/Proof of Pension Grant | <input type="button" value="Browse"/> | Proof of income |
| Confirmation of Employment | <input type="button" value="Browse"/> | Proof of employment |
| Affidavit Document | <input type="button" value="Browse"/> | Affidavit |
| Proof of Residential Address | <input type="button" value="Browse"/> | Copy of Proof of Address |
| Additional Document | <input type="button" value="Browse"/> | Additional Documentation |

Documents Attached

CoE PLM

Progress

Document(s) Uploaded

AGREEMENT RENEWAL

COMMUNICATION <

DEPARTMENT TENANTS

NOTICE <

INSPECTIONS <

TERMINATIONS <

Proof of Residential Address Copy of Proof of Address

Additional Document Additional Documentation

Progress Popup – Documents Uploaded

Documents Upload

| | | |
|--------------------------------|---------------------------------------|--|
| Identity Document | <input type="button" value="Browse"/> | ID Copy.pdf ✕ Copy of ID |
| Payslip/Proof of Pension Grant | <input type="button" value="Browse"/> | Proof of Income.pdf ✕ Proof of income |
| Confirmation of Employment | <input type="button" value="Browse"/> | Proof of Employment.pdf ✕ Proof of employment |
| Affidavit Document | <input type="button" value="Browse"/> | Affidavit.pdf ✕ Affidavit |
| Proof of Residential Address | <input type="button" value="Browse"/> | Proof of Address.pdf ✕ Copy of Proof of Address |
| Additional Document | <input type="button" value="Browse"/> | Additional Documents.pdf ✕ Additional Documentation |

Uploaded Document

| AWAITING AGREEMENT RENEWAL | | | | | |
|-----------------------------|------------------|------------------------------|------------------------|--------|---|
| Show 10 entries | | | Search: | | |
| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
| No data available in table | | | | | |
| Showing 0 to 0 of 0 entries | | | | | Previous Next |

© 2022 - PLM v1.0

Awaiting Agreement Renewal Page



The lease agreement will move to the Generate Lease Agreement queue.

You have now successfully completed this sub-section

16 GENERATING A LEASE AGREEMENT



After completing this sub-section, you will be able to generate a lease agreement.



The status must be “In Awaiting Lease Agreement”.

Navigate



On this screen:

- Click **Generate Agreement** on the Dashboard.
- You will be navigated to the **Generate Lease Agreement** page.

OR

- Click **Agreements** dropdown arrow on the navigation panel.
- Click Agreement Generate
- You will be navigated to the **Generate Lease Agreement** page.

Screen

The screenshot displays the CoE PLM dashboard for a Housing Liaison Officer. The navigation panel on the left includes 'Agreement Generate' (highlighted with a red box). The dashboard features several data cards: 'All Applications' (52), 'Master Applications' (44), 'New Applications' (8), and 'Signed Agreements' (9). Below these are 'PERSONALIZED DASHBOARD CARDS' including 'Renewal Reccomend...' (15 Recieved, 13 Completed), 'Renewal Acceptance' (11 Recieved, 8 Completed), 'Renewal Documents' (8 Recieved, 8 Completed), and 'Generate Agreement' (12 Recieved, 10 Completed, 2 Generate Agreement). Other cards show 'Agreement Signature' (6 Recieved, 6 Completed), 'Finalized Agreements' (11 Recieved, 5 Completed), 'Update Agreement' (4 Recieved, 4 Completed), and 'Noticed Agreements' (13 Recieved, 10 Completed, 3 Noticed Agreements).

Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Generate Lease Agreement** button on the line item of choice.
- You will be navigated to the respective page with a popup notification displaying, **Agreement of lease Successfully Generated.**
- Click **Ok**, to remove popup.

Screen

| Applicant Name | Application Type | Application Reference Number | Application Created Date | Status | Action |
|----------------|------------------------|------------------------------|--------------------------|-----------------------------|--------------------------|
| James Sithole | Individual Application | HSD2022111100001 | 2022/11/11 1:36:48 PM | In Awaiting Lease Agreement | Generate Lease Agreement |

Generate Lease Agreement Page

Agreement of Lease Successfully Generated!

OK

Notification Popup

Navigate



On this screen:

- Under **Generate Lease Agreement** sub-section, click on the **View** button to download the document.
- Open the downloaded **Lease Agreement** for viewing.
- Click **Finish**.
- You will be re-directed to the **Generate Lease Agreement** page.

Screen

EVALUATING APPLICATION

Show 10 entries Search:

| Reference Number | Applicant Type | Status | Captured Date | Customer Name | Action |
|------------------|------------------------|-----------------------------|-----------------------|---------------|----------------------|
| HSD2022111100001 | Individual Application | In Awaiting Lease Agreement | 2022/11/11 1:36:48 PM | James Sithole | View |

Showing 1 to 1 of 1 entries

GENERATED LEASE AGREEMENT

| Document Type | Document |
|--------------------|----------------------|
| Agreement Of Lease | View |

Generating a Lease

ANNEXURE E

1 / 9 | 100% +

AGREEMENT OF LEASE

MADE AND ENTERED INTO BY AND BETWEEN:

EKURHULENI METROPOLITAN MUNICIPALITY

(Hereinafter referred to as the **LESSOR** on the one part)

And
James Sithole
ID NUMBER: 9207095800084

Hereinafter referred to as the **LESSEE** on the other part

NOW, THEREFORE THE PARTIES AGREE AS FOLLOWS:

- That the **LESSOR** is the registered owner of Unit no. 12 Andries Scribante Old Age Home, Southern (hereinafter called THE UNIT)
- That the **LESSOR** is prepared to let the unit to the **LESSEE**, and the **LESSEE** is

Agreement of Lease

GENERATED LEASE AGREEMENT

| Document Type | Document |
|--------------------|----------------------|
| Agreement Of Lease | View |

[Finish](#)

© 2022 - PLM v1.0

Completed Generating a Lease Agreement

GENERATE LEASE AGREEMENT

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Application Created Date | Status | Action |
|----------------------------|------------------|------------------------------|--------------------------|--------|--------|
| No data available in table | | | | | |

Showing 0 to 0 of 0 entries Previous Next

© 2022 - PLM v1.0

Generate Lease Agreement Page



The lease agreement will be routed to the Senior Housing Specialist for reviewing and actioning.

You have now successfully completed this sub-section

17 SIGNING AN AGREEMENT OF LEASE



After completing this sub-section, you will be able to sign an agreement of lease.



Once the Regional Manager has approved the Agreement of Lease, the tenant will need to sign the Lease Agreement.



- The customer/tenant is required to Accept/ Reject the Agreement of Lease by either using SMS with the OTP or the Email with the link.
- Should the tenant not be able to action the Agreement of Lease using the self-service, he or she will need to visit the offices and the Housing Liaison Officer will action it on the system on their behalf.

Navigate



On this screen:

- Click **Agreement Signature** on the Dashboard.
- You will be navigated to the **Awaiting Applicant's Signature** page.

OR

- Click **Agreements** dropdown arrow on the navigation panel.
- Click Agreement Signature
- You will be navigated to the **Awaiting Applicant's Signature** page.

Screen

CoE PLM

HUMAN SETTLEMENT DASHBOARD - HOUSING LIAISON OFFICER
Wednesday, February 15, 2023 - 10:41:35

52 All Applications | 44 Master Applications | 8 New Applications | 9 Signed Agreements

PERSONALIZED DASHBOARD CARDS

| | | | |
|--|---|---|--|
| 15 Recieved 13 Completed Renewal Reccomend... 2 | 11 Recieved 8 Completed Renewal Acceptance 3 | 8 Recieved 8 Completed Renewal Documents 0 | 12 Recieved 10 Completed Generate Agreement 2 |
| 6 Recieved 6 Completed Agreement Signature 0 | 11 Recieved 5 Completed Finalized Agreements 6 | 4 Recieved 4 Completed Update Agreement 0 | 13 Recieved 10 Completed Noticed Agreements 3 |

Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Signature** button on the line item of choice.
- You will be navigated to the respective page.

Screen

AWAITING APLICANTS SIGNATURE

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Application Created Date | Status | Action |
|-----------------|------------------------|------------------------------|--------------------------|---------------------------------|------------------|
| James Sithole | Individual Application | HSD2022111100001 | 2022/11/11 1:36:48 PM | In Awaiting Applicant Signature | Signature |
| RYAN poonsamy | Individual Application | HSD2022103100001 | 2022/10/31 12:34:47 PM | In Awaiting Applicant Signature | Signature |
| shevek poonsamy | Individual Application | HSD2022091300002 | 2022/09/13 12:19:03 PM | In Awaiting Applicant Signature | Signature |
| Shevek Poonsamy | Individual Application | HSD2022091400002 | 2022/09/14 3:16:10 PM | In Awaiting Applicant Signature | Signature |
| shevek | Individual | HSD2022101400004 | 2022/10/14 11:47:21 | In Awaiting Applicant | Signature |

Awaiting Applicant's Signature Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate



On this screen:

- Under **Generated Agreement of Lease** sub-section, click on the **View** button to download the document.
- Open the downloaded **Agreement of Lease** for viewing.
- Click on the **Signature** dropdown and make a selection.
- Select **Approval Action** as **Approved**
- Input the **One Time Pin** provided by the customer
- Click on the **Verify** button

Screen

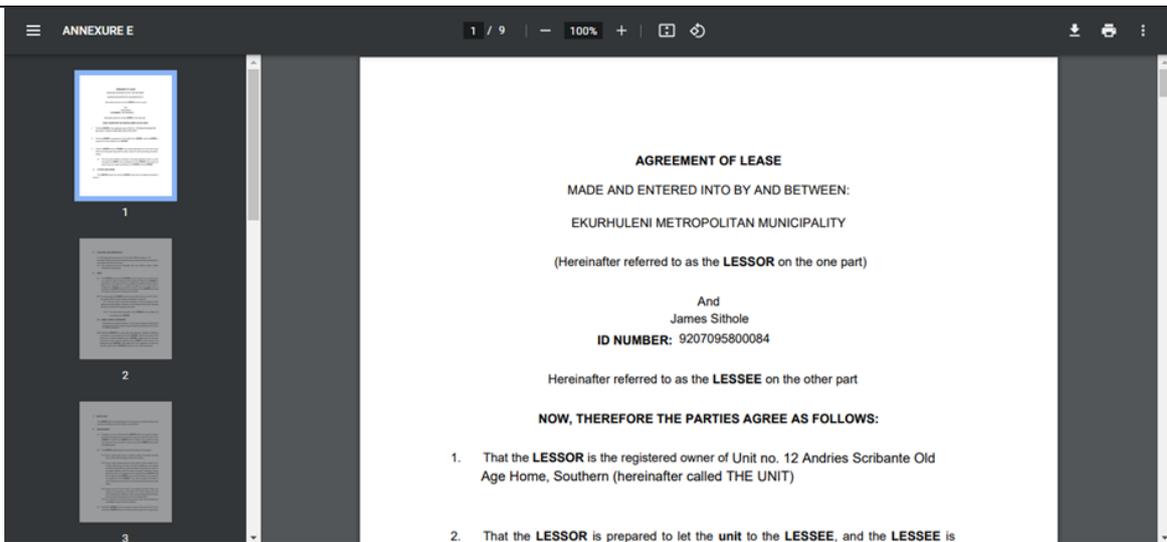
The screenshot displays two sections of a web application. The top section, titled 'EVALUATING APPLICATION', features a table with columns: Reference Number, Applicant Type, Status, Captured Date, Customer Name, and Action. A single entry is shown with a 'View' button. The bottom section, titled 'GENERATED AGREEMENT OF LEASE', features a table with columns: Document Type, Document, and Action. A 'View' button is highlighted with a red box.

| Reference Number | Applicant Type | Status | Captured Date | Customer Name | Action |
|------------------|------------------------|---------------------------------|-----------------------|---------------|----------------------|
| HSD2022111100001 | Individual Application | In Awaiting Applicant Signature | 2022/11/11 1:36:48 PM | James Sithole | View |

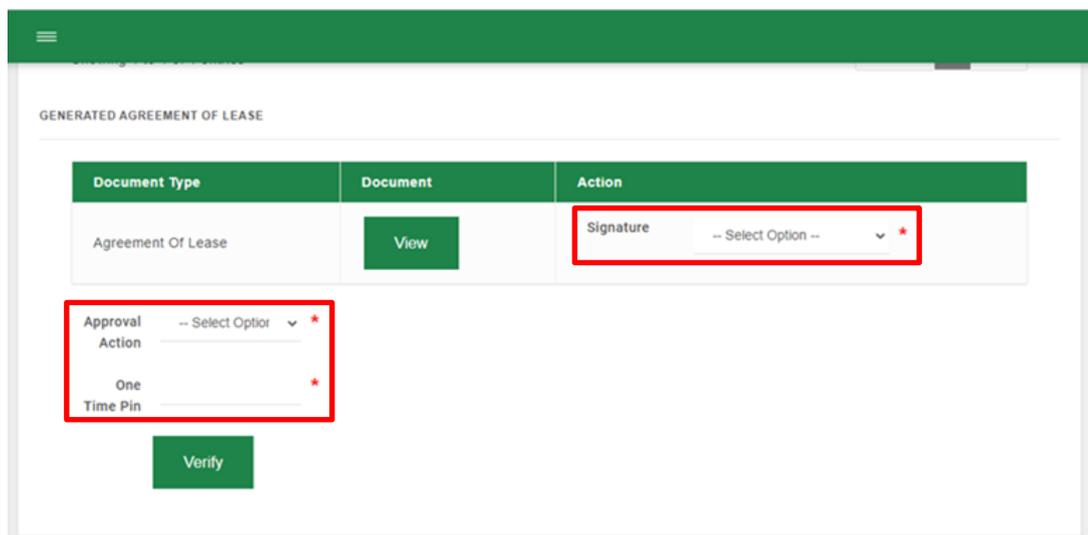
Showing 1 to 1 of 1 entries

| Document Type | Document | Action |
|--------------------|----------------------|-------------------------------|
| Agreement Of Lease | View | Signature -- Select Option -- |

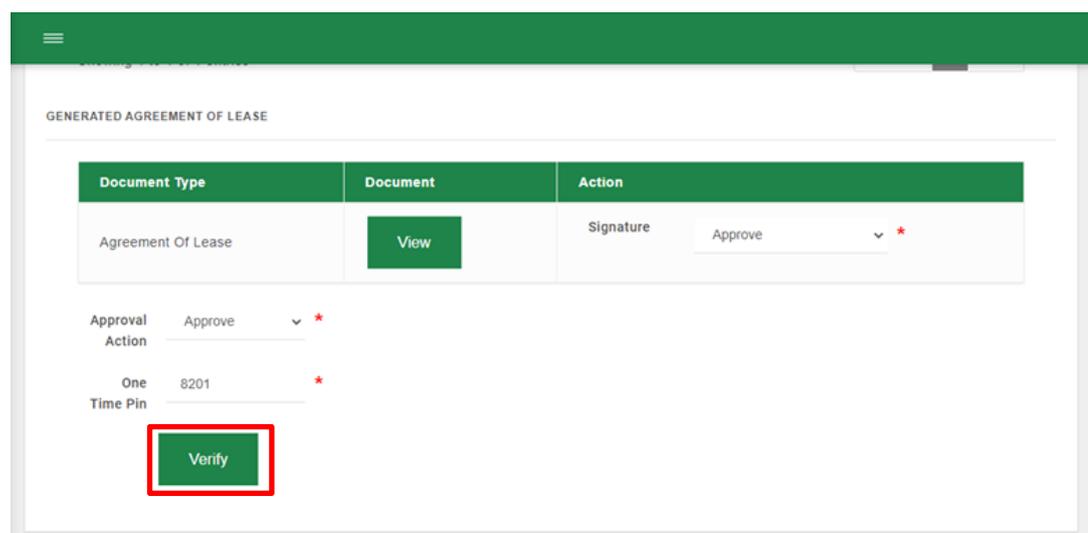
Signing an Agreement of Lease



Agreement of Lease



Signing an Agreement of Lease



Signing an Agreement of Lease

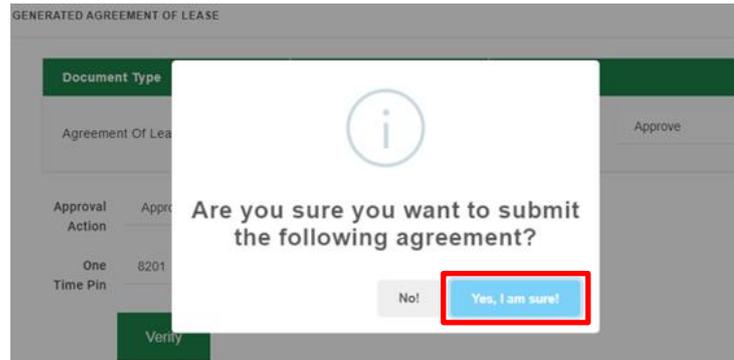
Navigate



On this screen:

- A confirmation popup box will display, **Are you sure you want to submit the following agreement?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Awaiting Agreement Recommendations** page.

Screen



Confirmation Popup

| Applicant Name | Application Type | Application Reference Number | Application Created Date | Status | Action |
|-----------------|------------------------|------------------------------|--------------------------|---------------------------------|-----------|
| RYAN poonsamy | Individual Application | HSD2022103100001 | 2022/10/31 12:34:47 PM | In Awaiting Applicant Signature | Signature |
| shevek poonsamy | Individual Application | HSD2022091300002 | 2022/09/13 12:19:03 PM | In Awaiting Applicant Signature | Signature |
| Shevek Poonsamy | Individual Application | HSD2022091400002 | 2022/09/14 3:16:10 PM | In Awaiting Applicant Signature | Signature |
| shevek poonsamy | Individual Application | HSD2022101400004 | 2022/10/14 11:47:21 AM | In Awaiting Applicant Signature | Signature |

Awaiting Applicant's Signature Page



The lease agreement will move to the Finalized Agreement queue.

You have now successfully completed this sub-section

18 FINALIZE LEASE AGREEMENT



After completing this sub-section, you will be able to finalize the lease agreement.



To finalize the lease agreement the status will be "In Awaiting Upload Final Agreement of Lease".

Navigate



On this screen:

- Click **Finalized Agreement** on the Dashboard.
- You will be navigated to the **Finalized Agreement of Lease** page.

OR

- Click **Agreements** dropdown arrow on the navigation panel.
- Click Finalized Agreement
- You will be navigated to the **Finalized Agreement of Lease** page.

Screen

The screenshot displays the CoE PLM dashboard for a Housing Liaison Officer. The navigation panel on the left includes options like Profile, PLM Applications, Agreements, Agreement Renewal, Communication, Department Tenants, Notice, Inspections, Terminations, and Audit. The 'Finalized Agreement' option is highlighted with a red box. The main dashboard area shows several data cards: 'All Applications' (52), 'Master Applications' (44), 'New Applications' (8), and 'Signed Agreements' (9). Below these are 'PERSONALIZED DASHBOARD CARDS' with sub-categories like 'Renewal Reccomend...', 'Renewal Acceptance', 'Renewal Documents', 'Generate Agreement', 'Agreement Signature', 'Finalized Agreements', 'Update Agreement', and 'Noticed Agreements'. The 'Finalized Agreements' card is highlighted with a red box, showing 11 Received and 5 Completed.

Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Upload Final Agreement** button on the line item of choice.
- You will be navigated to the respective page.

Screen

| Applicant Name | Application Type | Application Reference Number | Application Created Date | Status | Action |
|----------------|------------------------|------------------------------|--------------------------|---|------------------------|
| James Sithole | Individual Application | HSD2022111100001 | 2022/11/11 1:36:48 PM | In Awaiting Upload Final Agreement of Lease | Upload Final Agreement |

Finalized Agreement of Lease Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents
- Under **Generated Agreement of Lease** sub-section, you are able to download and view the Agreement of Lease.

Navigate



On this screen:

- Click on the **Browse** button.
- Select the necessary document from your computer files.
- Click on the **Open** button.
- The document will be attached. (The document name will reflect next to the browse button)

- Click **Upload** to proceed with the upload.
- A popup notification will display: **Document(s) Uploaded.**
- Click **Ok** to remove popup box.
- The document name will change from black text to blue.
- Select **Approval Action** as **Approved**
- Click on the **Submit** button.

Screen

EVALUATING APPLICATION

Show 10 entries Search:

| Reference Number | Applicant Type | Status | Captured Date | Customer Name | Action |
|------------------|------------------------|---|-----------------------|---------------|----------------------|
| HSD2022111100001 | Individual Application | In Awaiting Upload Final Agreement of Lease | 2022/11/11 1:36:48 PM | James Sithole | View |

Showing 1 to 1 of 1 entries Previous 1 Next

GENERATED AGREEMENT OF LEASE

| Document Type | Document |
|--------------------|----------------------|
| Agreement Of Lease | View |

Final Agreement of Lease

FINAL AGREEMENT OF LEASE

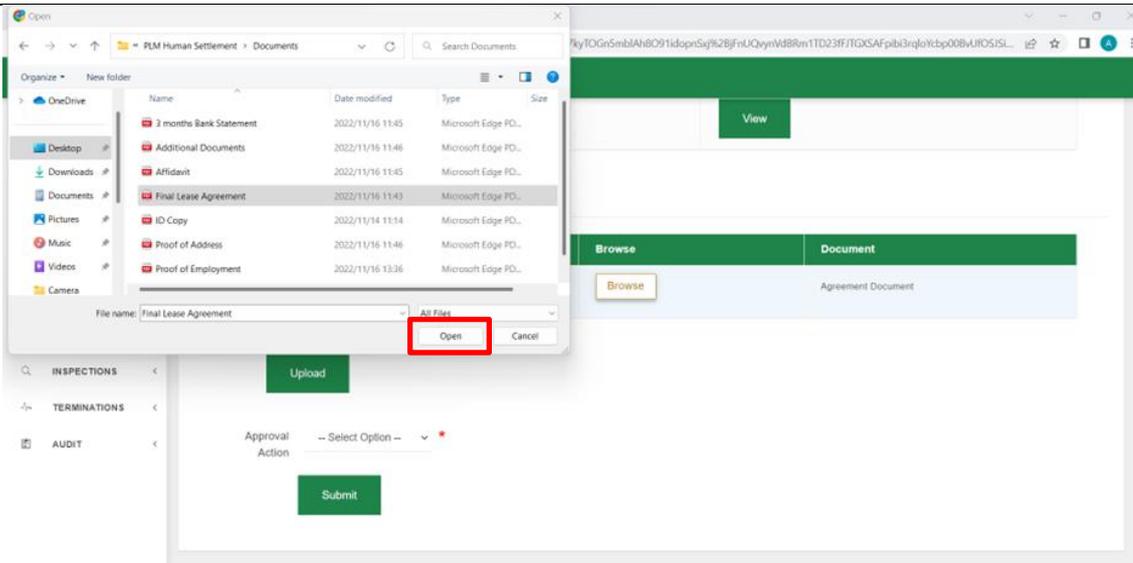
| Document Type | Browse | Document |
|--------------------------|------------------------|--------------------|
| Final Agreement Of Lease | Browse | Agreement Document |

[Upload](#)

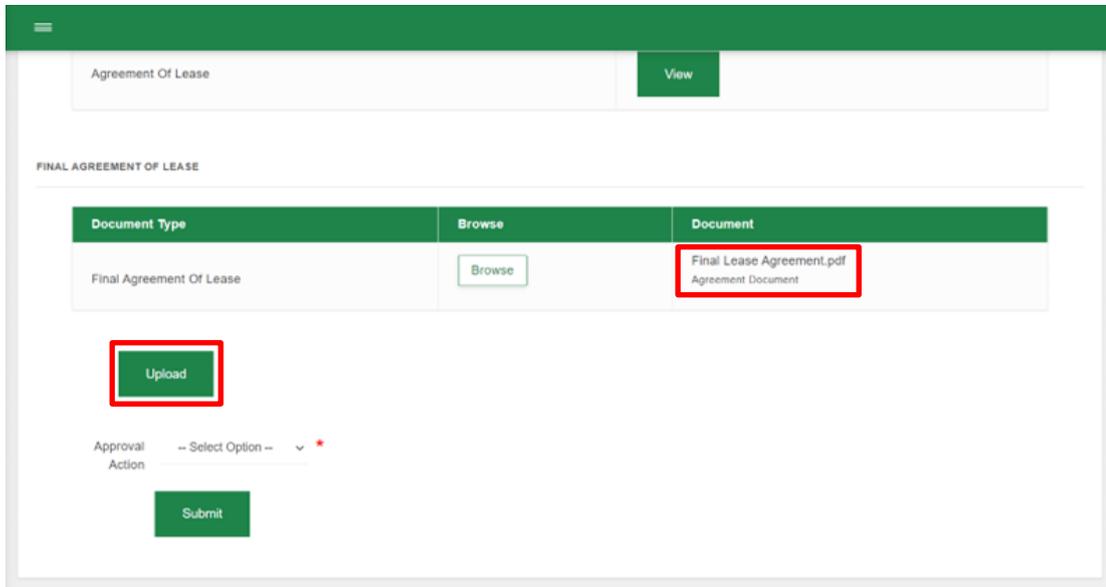
Approval Action: -- Select Option *

[Submit](#)

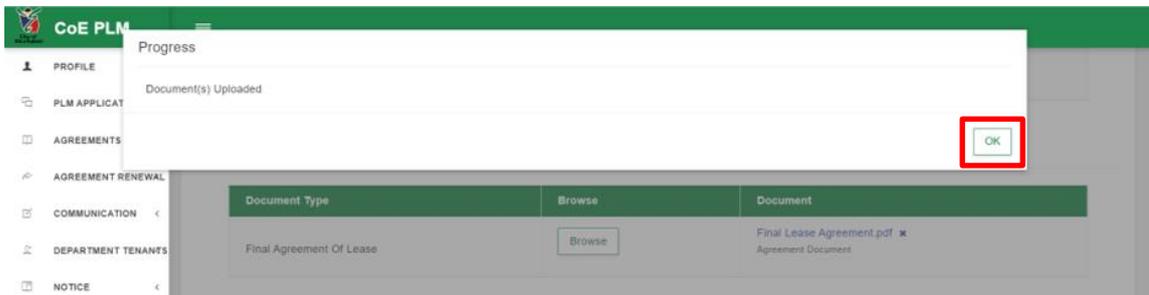
Final Agreement of Lease



Selecting Document from Computer Files



Document Attached



Progress Popup – Documents Uploaded

Agreement Of Lease View

FINAL AGREEMENT OF LEASE

| Document Type | Browse | Document |
|--------------------------|---------------------------------------|---|
| Final Agreement Of Lease | <input type="button" value="Browse"/> | Final Lease Agreement.pdf Agreement Document |

Approval Action: -- Select Option --

Uploaded Document

Agreement Of Lease View

FINAL AGREEMENT OF LEASE

| Document Type | Browse | Document |
|--------------------------|---------------------------------------|---|
| Final Agreement Of Lease | <input type="button" value="Browse"/> | Final Lease Agreement.pdf Agreement Document |

Approval Action: Approve

Finalize Agreement of Lease

Navigate



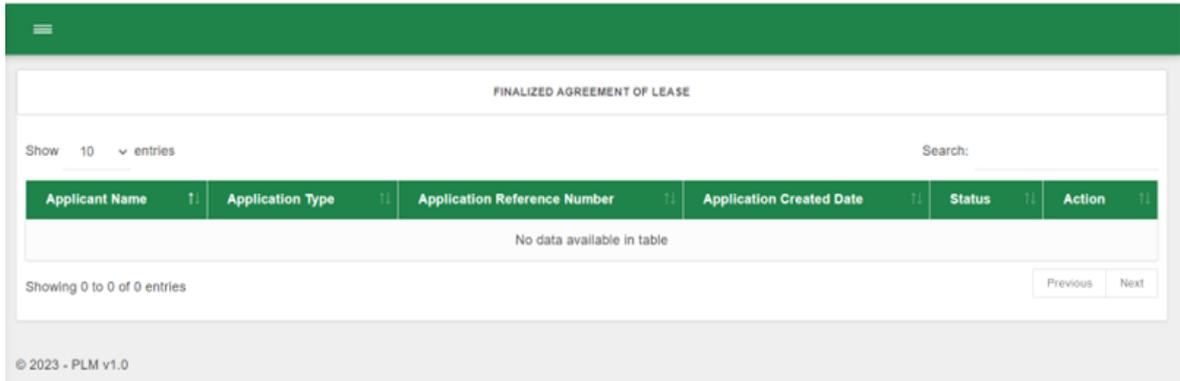
On this screen:

- A confirmation popup box will display, **Are you sure you want to submit the following agreement?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Finalized Agreement of Lease** page.

Screen



Confirmation Popup



Finalized Agreement of Lease Page

You have now successfully completed this sub-section

19 TENANT SERVING NOTICE



After completing this sub-section, you will be able to assist the tenant in serving notice of the lease termination.

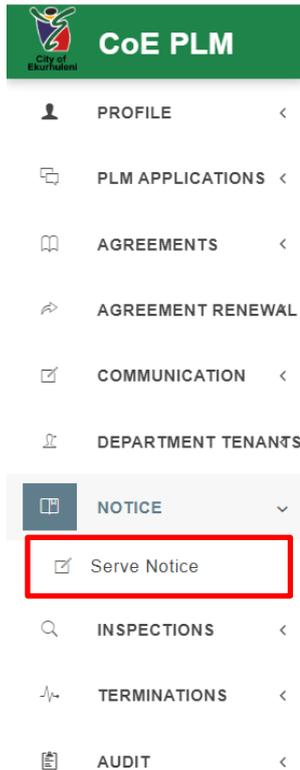
Navigate



On this screen:

- Click **Notice** dropdown arrow on the navigation panel.
- Click **Serve Notice**
- You will be navigated to the **Serve Agreement Termination Notice** page.

Screen



Navigation Panel and Dashboard

Navigate

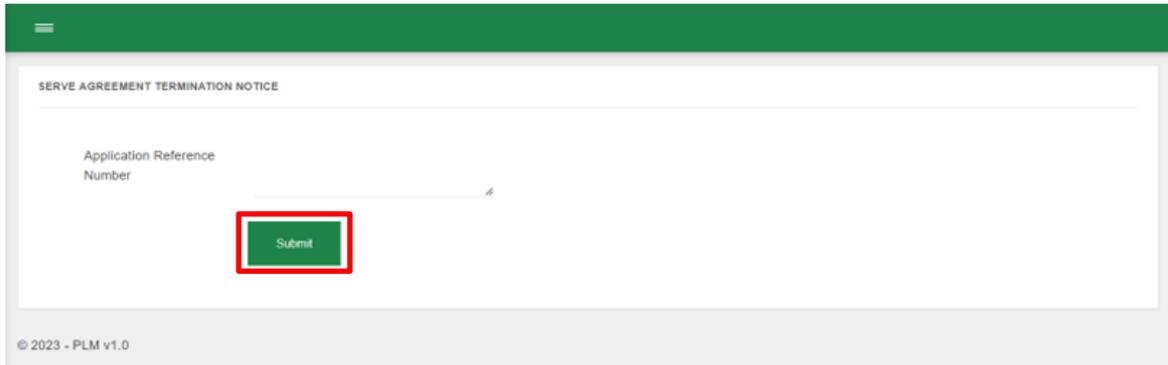


On this screen:

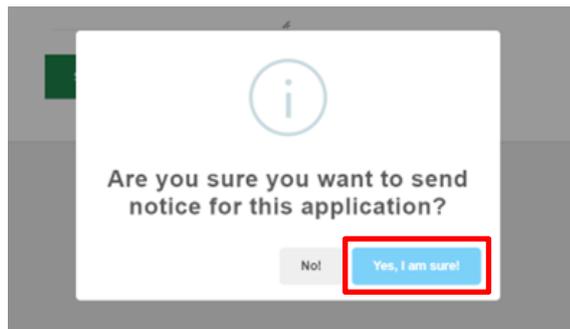
- Input the **Application Reference Number**

- Click **Submit**
- A confirmation popup box will display, **Are you sure you want to send notice for this application?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the respective page.

Screen



Serve Agreement Termination Notice Page



Confirmation Popup



Please select full calendar month. (The Notice Date has to be the last day of the full calendar month)

Navigate



On this screen:

- Select the **Notice Date** from the **Calendar**
- A confirmation popup box will display, **Are you sure you want to send notice for this application?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Serve Agreement Termination Notice** page, with a **Success** notification displayed.
- Click **Ok** to remove popup.

Screen

EVALUATING APPLICATION

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|-----------------|------------------------|------------------------------|------------------------|--------------|----------------------|
| Siyanda Ngxongo | Individual Application | HSD2023020800001 | 2023/02/08 2:17:50 PM | Active Lease | View |

Showing 1 to 1 of 1 entries

Notice Date

© 2023 - PLM v1.0

Serve Agreement Termination Notice

Are you sure you want to send notice for this application?

Confirmation Popup

Success!

Success Notification



The Lease Agreement will move to the Noticed Agreements queue for the next step.

You have now successfully completed this sub-section

20 NOTICED AGREEMENTS



After completing this sub-section, you will be able to action the noticed agreement.

Navigate



On this screen:

- Click **Noticed Agreements** on the Dashboard.
- You will be navigated to the **Noticed Agreement Terminations** page.

OR

- Click **Terminations** dropdown arrow on the navigation panel.
- Click **Terminate Agreement**
- You will be navigated to the **Noticed Agreement Terminations** page.

Screen

CoE PLM

HUMAN SETTLEMENT DASHBOARD - HOUSING LIAISON OFFICER
Tuesday, February 21, 2023 - 11:13:59

| | | | |
|------------------|---------------------|------------------|-------------------|
| 53 | 45 | 8 | 9 |
| All Applications | Master Applications | New Applications | Signed Agreements |

PERSONALIZED DASHBOARD CARDS

| | | | |
|--|---|---|--|
| 15 Recieved / 13 Completed Renewal Reccomend... 2 | 11 Recieved / 8 Completed Renewal Acceptance 3 | 8 Recieved / 8 Completed Renewal Documents 0 | 12 Recieved / 10 Completed Generate Agreement 2 |
| 6 Recieved / 6 Completed Agreement Signature 0 | 12 Recieved / 6 Completed Finalized Agreements 6 | 4 Recieved / 4 Completed Update Agreement 0 | 14 Recieved / 11 Completed Noticed Agreements 3 |

Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Terminate Agreement** button on the line item of choice.

- You will be navigated to the respective page.

Screen

| Applicant Name | Application Type | Application Reference Number | Application Created Date | Status | Action |
|-----------------|------------------------|------------------------------|--------------------------|--------------------------------------|---------------------|
| ryan poonsamy | Individual Application | HSD2022112300002 | 2022/11/23 | Applicant Vacated The Unit | Terminate Agreement |
| shevek poonsamy | Individual Application | HSD2023010500004 | 2023/01/05 | In Awaiting Vacating Confirmation | Terminate Agreement |
| shevek poonsamy | Individual Application | HSD2023010500005 | 2023/01/05 | Property Lease Application Completed | Terminate Agreement |
| Siyanda Ngxongo | Individual Application | HSD2023020800001 | 2023/02/08 | Property Lease Application Completed | Terminate Agreement |

Noticed Agreement Terminations Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate



On this screen:

- The **Notice Date** will be displayed.
- Select the **Termination Date** from the **Calendar**
- Select the **Termination Reason** from the dropdown list, as **Tenant Notice**
- Click **Submit**

Screen

EVALUATING APPLICATION

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|-----------------|------------------------|------------------------------|------------------------|--------------|----------------------|
| Siyanda Ngxongo | Individual Application | HSD2023020800001 | 2023/02/08 2:17:50 PM | Active Lease | View |

Showing 1 to 1 of 1 entries Previous 1 Next

Notice Date 2023-03-31

Termination Date yyyy/mm/dd *

Termination Reason -- Select Option -- *

[Submit](#)

© 2023 - PLM v1.0

Notice Agreement Terminations

EVALUATING APPLICATION

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|-----------------|------------------------|------------------------------|------------------------|--------------|----------------------|
| Siyanda Ngxongo | Individual Application | HSD2023020800001 | 2023/02/08 2:17:50 PM | Active Lease | View |

Showing 1 to 1 of 1 entries Previous 1 Next

Notice Date 2023-03-31

Termination Date 2023/03/31 *

Termination Reason Tenant Notice *

[Submit](#)

© 2023 - PLM v1.0

Notice Agreement Terminations

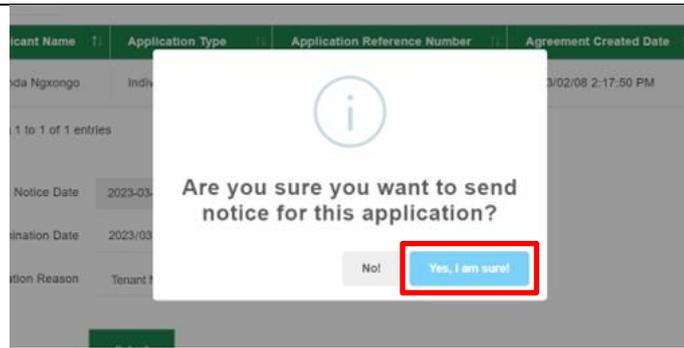
Navigate



On this screen:

- A confirmation popup box will display, **Are you sure you want to send notice for this application?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Notice Agreement Terminations** page.

Screen



Confirmation Popup

NOTICED AGREEMENT TERMINATIONS

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Application Created Date | Status | Action |
|-----------------|------------------------|------------------------------|--------------------------|--------------------------------------|-------------------------------------|
| ryan poonsamy | Individual Application | HSD2022112300002 | 2022/11/23 | Applicant Vacated The Unit | Terminate Agreement |
| shevek poonsamy | Individual Application | HSD2023010500004 | 2023/01/05 | In Awaiting Vacating Confirmation | Terminate Agreement |
| shevek poonsamy | Individual Application | HSD2023010500005 | 2023/01/05 | Property Lease Application Completed | Terminate Agreement |

Showing 1 to 3 of 3 entries Previous 1 Next

© 2023 - PLM v1.0

Noticed Agreement Terminations Page

You have now successfully completed this sub-section

21 CONDUCT UNIT INSPECTION



After completing this sub-section, you will be able to conduct a unit inspection.



Post Inspections are conducted:

- When a Tenant is Serving Notice
- Under Agreement of Lease Termination.

Navigate



On this screen:

- Click **Post Inspection** on the Dashboard.
- You will be navigated to the **In Awaiting Exit Inspection** page.

OR

- Click **Inspections** dropdown arrow on the navigation panel.
- Click **Post-Inspection**
- You will be navigated to the **In Awaiting Exit Inspection** page.

Screen

The screenshot shows the CoE PLM dashboard interface. On the left is a navigation panel with a search bar and a list of menu items: PROFILE, PLM APPLICATIONS, AGREEMENTS, AGREEMENT RENEWAL, COMMUNICATION, DEPARTMENT TENANTS, NOTICE, INSPECTIONS, Post-Inspection (highlighted with a red box), TERMINATIONS, and AUDIT. The main area displays 'PERSONALIZED DASHBOARD CARDS' in a 3x4 grid. The bottom-right card, 'Post Inspection', is highlighted with a red box and shows 17 Recieved and 10 Completed. Other cards include 'Renewal Reccomend...', 'Renewal Acceptance', 'Renewal Documents', 'Generate Agreement', 'Agreement Signature', 'Finalized Agreements', 'Update Agreement', and 'Noticed Agreements'.

Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Exit Inspection** button on the line item of choice.
- You will be navigated to the respective page.

Screen

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|-----------------|------------------------|------------------------------|------------------------|-----------------------------|-----------------|
| Nicole poonsamy | Individual Application | HSD2023011000001 | 2023/01/10 3:51:22 PM | In Awaiting Exit Inspection | Exit Inspection |
| shevek poonsamy | Individual Application | HSD2023010500005 | 2023/01/05 2:06:05 PM | In Awaiting Exit Inspection | Exit Inspection |
| shevek poonsamy | Individual Application | HSD2023010600001 | 2023/01/06 9:21:48 AM | In Awaiting Exit Inspection | Exit Inspection |
| shevek poonsamy | Individual Application | HSD2023010600002 | 2023/01/06 9:26:02 AM | In Awaiting Exit Inspection | Exit Inspection |
| Siyanda Ngxongo | Individual Application | HSD2023010500003 | 2023/01/05 12:54:04 PM | In Awaiting Exit Inspection | Exit Inspection |
| Siyanda Ngxongo | Individual Application | HSD2023020800001 | 2023/02/08 2:17:50 PM | In Awaiting Exit Inspection | Exit Inspection |

In Awaiting Exit Inspection Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate



On this screen:

- Under **Conduct Exit Inspection Template** sub-section, click on the **Download** button, to download the **Post-Inspection Template**.
- Select the template from your downloaded computer file for viewing and print.

Screen

EVALUATING APPLICATION

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Agreement End Date | Status | Action |
|-----------------|------------------------|------------------------------|------------------------|-----------------------------|----------------------|
| Siyanda Ngxongo | Individual Application | HSD2023020800001 | 2023/03/31 12:00:00 AM | In Awaiting Exit Inspection | View |

Showing 1 to 1 of 1 entries Previous 1 Next

CONDUCT EXIT INSPECTION TEMPLATE

| Document Type | Link | Description |
|--------------------------|--------------------------|---|
| Post-Inspection Template | Download | Post-Inspection Uploaded On 2022-10-03 13:43:58 |

UPLOAD COMPLETED EXIT INSPECTION

| Document Type | Browse | Document |
|---------------|--------|----------|
|---------------|--------|----------|

Post Inspection

UNIT INSPECTION CHECKLIST.pdf 1 / 1 100% +

Ekurhuleni
METROPOLITAN MUNICIPALITY

INSPECTION CHECK LIST

FLAT/UNIT NO.: _____

COMPLEX: _____

| ITEMS | GOOD/POOR | REMARKS |
|-----------------------|-----------|---------|
| WALLS | | |
| DOORS & HANDLES | | |
| CURTAIN RAILS | | |
| FLOORS | | |
| PLUGS/SWITCHES/LIGHTS | | |
| TAPS | | |
| GLOBES | | |
| BATH | | |
| HAND BASIN | | |
| KITCHEN SINK | | |

Post-Inspection Template



After completing the Inspection Check List, it will need to be uploaded and saved on the PLM system.

Navigate

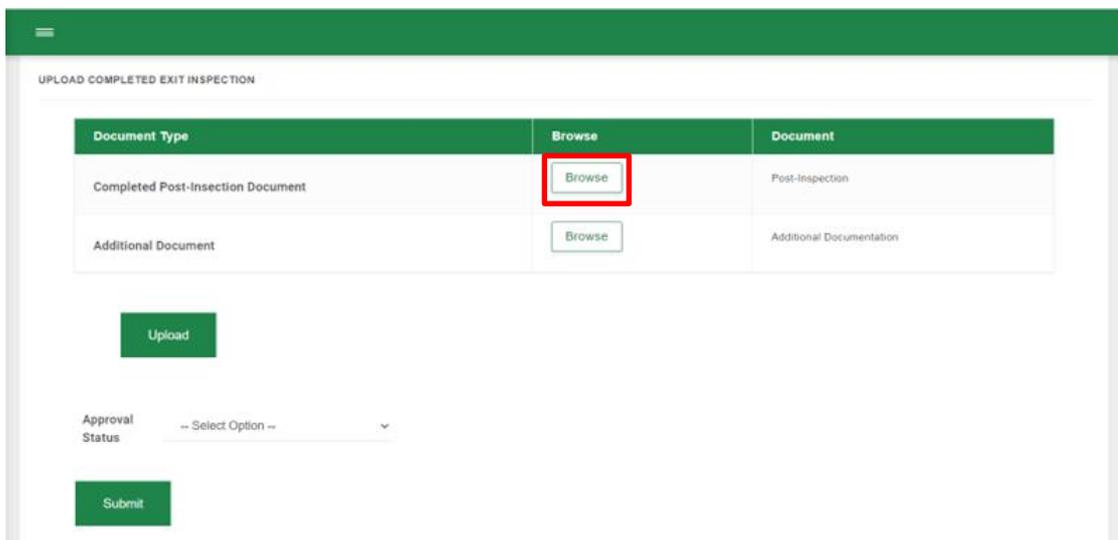


On this screen:

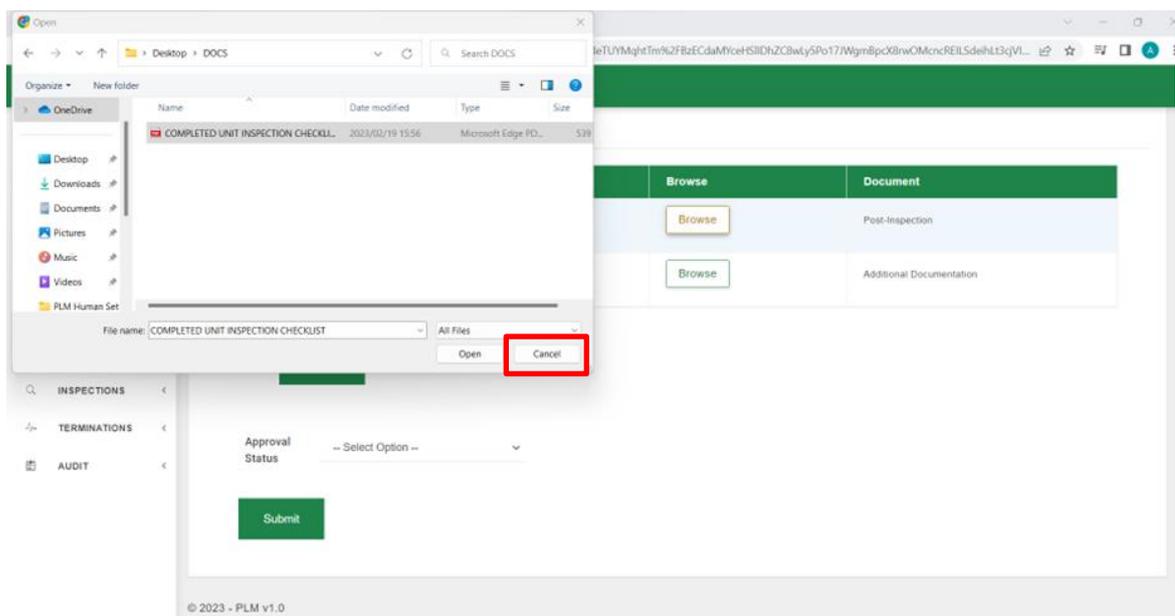
- Click on the **Browse** button.
- Select the necessary document from your computer files.

- Click on the **Open** button.
- The document will be attached. (The document name will reflect next to the browse button)
- Click **Upload** to proceed with the upload.
- A popup notification will display: **Document(s) Uploaded.**
- Click **Ok** to remove popup box.
- The document name will change from black text to blue.
- Repeat the above process to upload an **Additional Document** (Optional).

Screen



Upload Completed Post-Inspection Document



Selecting Document from Computer Files

UPLOAD COMPLETED EXIT INSPECTION

| Document Type | Browse | Document |
|------------------------------------|---------------------------------------|--|
| Completed Post-Inspection Document | <input type="button" value="Browse"/> | COMPLETED UNIT INSPECTION CHECKLIST.pdf Post-Inspection |
| Additional Document | <input type="button" value="Browse"/> | Additional Documentation |

Approval Status -- Select Option --

Document Attached

CoE PLM

Progress

Document(s) Uploaded

Additional Document Additional Documentation

Progress Popup – Documents Uploaded

UPLOAD COMPLETED EXIT INSPECTION

| Document Type | Browse | Document |
|------------------------------------|---------------------------------------|--|
| Completed Post-Inspection Document | <input type="button" value="Browse"/> | COMPLETED UNIT INSPECTION CHECKLIST.pdf Post-Inspection |
| Additional Document | <input type="button" value="Browse"/> | Additional Documentation |

Approval Status -- Select Option --

Uploaded Document



There are 3 types of Inspection Outcomes:

1. Habitable – Minor Defects, meaning maintenance can be conducted while continuing with the leasing process of the unit.
2. Habitable – No Defects, meaning there is no need for maintenance and can continue with the leasing process.
3. Not Habitable, meaning the unit is not suitable for living and maintenance will need to be conducted in the unit it is suitable for the tenant to view again. The application will be In Awaiting Maintenance Job Sheet.

Navigate



On this screen:

- Select **Approval Status** (eg. Habitable – No Defects)
- Click **Submit**
- A confirmation popup box will display, **Are you sure you want to submit the following document approval?**, Click **Yes, I am sure!** to acknowledge.

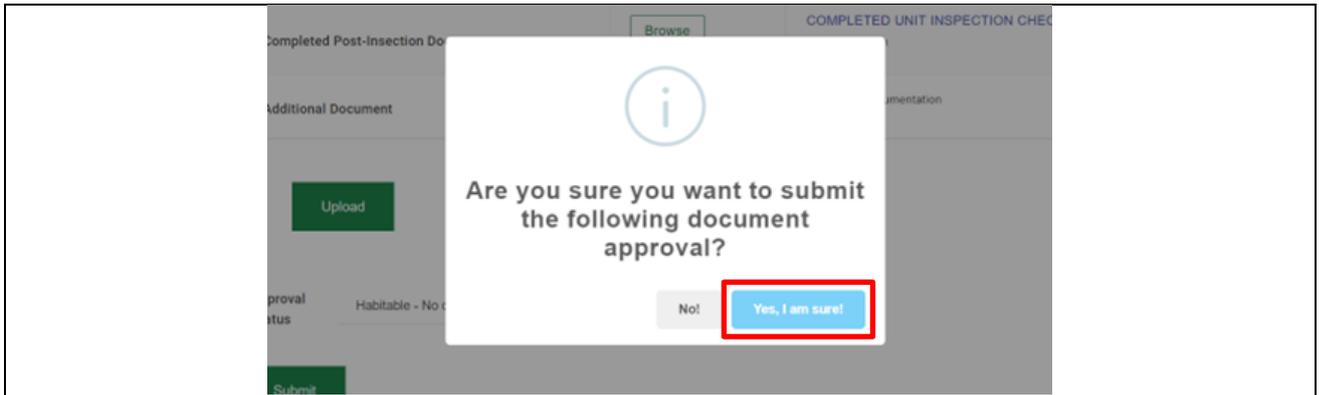
Screen

| Document Type | Browse | Document |
|------------------------------------|---------------------------------------|--|
| Completed Post-Inspection Document | <input type="button" value="Browse"/> | COMPLETED UNIT INSPECTION CHECKLIST.pdf x Post-Inspection |
| Additional Document | <input type="button" value="Browse"/> | Additional Documentation |

Approval Status: Habitable - No defects

© 2023 - PLM v1.0

Post Inspection



Confirmation Popup



Once the Completed Inspection Check List has been submitted, the next step of the Termination process is Pending Take-Off.

You have now successfully completed this sub-section

22 CONDUCT UNIT VACATED INSPECTION



After completing this sub-section, you will be able to conduct a unit vacated inspection.



- Unit Vacated Inspections are conducted when a tenant is serving Notice or under Agreement of Lease Termination.
- You are required to conduct a unit inspection of whether the tenant has vacated the unit or not and log it on the PLM system.

Navigate



On this screen:

- Click **Pending Take-Off** on the Dashboard.
- You will be navigated to the **Awaiting Take-Off Confirmation** page.

OR

- Click **Terminations** dropdown arrow on the navigation panel.
- Click **Pending Take-Off**
- You will be navigated to the **Awaiting Take-Off Confirmation** page.

Screen

The screenshot shows the CoE PLM dashboard. On the left is a navigation panel with the following items: PROFILE, PLM APPLICATIONS, AGREEMENTS, AGREEMENT RENEWAL, COMMUNICATION, DEPARTMENT TENANTS, NOTICE, INSPECTIONS, and TERMINATIONS. Under TERMINATIONS, there are sub-items: Noticed Agreements, Pending Take-Off (highlighted with a red box), and Terminate Agreement. The main dashboard area is titled 'PERSONALIZED DASHBOARD CARDS' and contains a grid of cards. The bottom-left card is highlighted with a red box and shows: 10 Received, 6 Completed, and Pending Take-Off 4. Other cards include Renewal Reccomend... 2, Renewal Acceptance 3, Renewal Documents 0, Generate Agreement 2, Agreement Signature 0, Finalized Agreements 6, Update Agreement 0, and Noticed Agreements 3.

Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Confirmation** button on the line item of choice.
- You will be navigated to the respective page.

Screen

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|-----------------|------------------------|------------------------------|------------------------|-----------------------------------|--------------|
| shevek poonsamy | Individual Application | HSD2023010500001 | 2023/01/05 7:38:02 AM | In Awaiting Vacating Confirmation | Confirmation |
| shevek poonsamy | Individual Application | HSD2023010500002 | 2023/01/05 12:50:22 PM | In Awaiting Vacating Confirmation | Confirmation |
| shevek poonsamy | Individual Application | HSD2023010500004 | 2023/01/05 12:59:48 PM | In Awaiting Vacating Confirmation | Confirmation |
| Siyanda Ngxongo | Individual Application | HSD2023020800001 | 2023/02/08 2:17:50 PM | In Awaiting Vacating Confirmation | Confirmation |

Awaiting Take-Off Confirmation Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents
- If the tenant has not vacated the premises, they will still be billed.

Navigate



On this screen:

- Select **Tenant Vacated** from the dropdown
- Click **Submit**

Screen

EVALUATING APPLICATION

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Agreement End Date | Status | Action |
|----------------|------------------------|------------------------------|------------------------|-----------------------------------|----------------------|
| Siyanda Nxongo | Individual Application | HSD2023020800001 | 2023/03/31 12:00:00 AM | In Awaiting Vacating Confirmation | View |

Showing 1 to 1 of 1 entries

VACATING APPLICANT ACTION

Tenant -- Select Option --
 Vacated

Submit

Unit Vacated Inspection

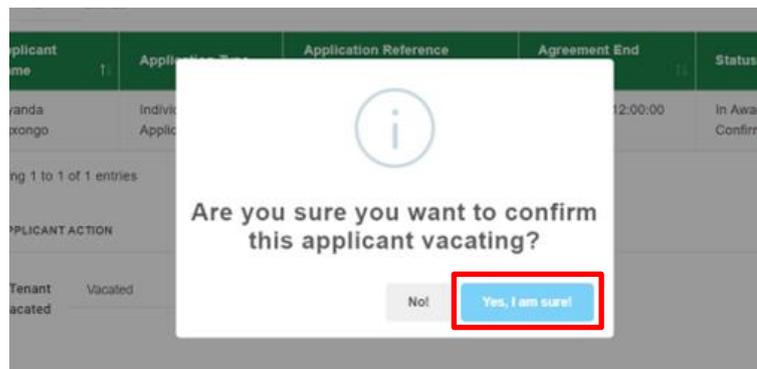
Navigate



On this screen:

- A confirmation popup box will display, **Are you sure you want to confirm this applicant vacating?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Awaiting Take-Off Confirmation** page.

Screen



Confirmation Popup

ion

AWAITING TAKE-OFF CONFIRMATION

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|-----------------|------------------------|------------------------------|------------------------|-----------------------------------|------------------------------|
| shevek poonsamy | Individual Application | HSD2023010500001 | 2023/01/05 7:38:02 AM | In Awaiting Vacating Confirmation | Confirmation |
| shevek poonsamy | Individual Application | HSD2023010500002 | 2023/01/05 12:50:22 PM | In Awaiting Vacating Confirmation | Confirmation |
| shevek poonsamy | Individual Application | HSD2023010500004 | 2023/01/05 12:59:48 PM | In Awaiting Vacating Confirmation | Confirmation |

Showing 1 to 3 of 3 entries Previous **1** Next

© 2023 - PLM v1.0

Awaiting Take-Off Confirmation Page

You have now successfully completed this sub-section

23 AGREEMENT OF LEASE TERMINATION



After completing this sub-section, you will be able to send a notice for an agreement of lease termination.

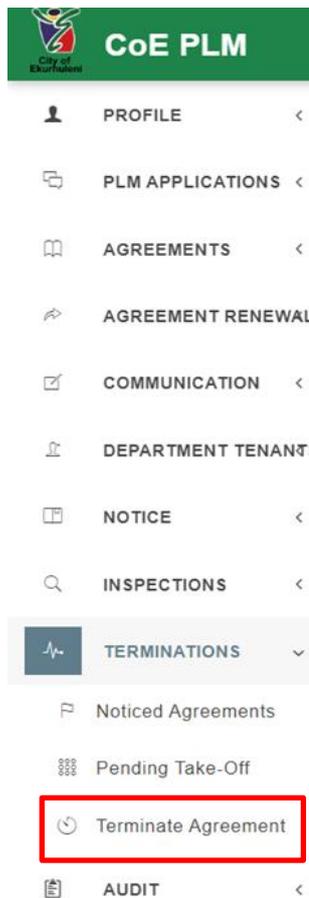
Navigate



On this screen:

- Click **Terminations** dropdown arrow on the navigation panel.
- Click **Terminate Agreement**
- You will be navigated to the **Agreement of Lease Termination** page.

Screen



Navigation Panel

Navigate

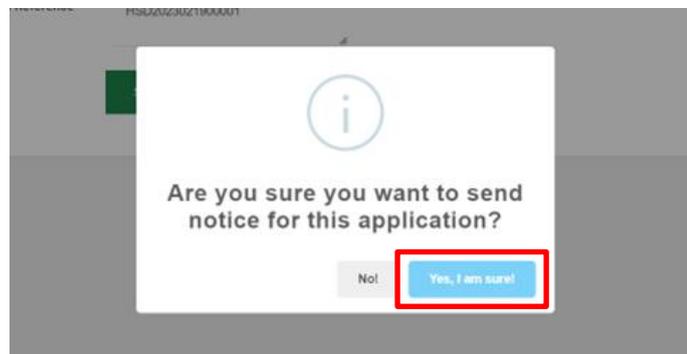


On this screen:

- Input the **Application Reference Number**
- Click **Submit**
- A confirmation popup box will display, **Are you sure you want to send notice for this application?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the respective page.

Screen

Application of Lease Termination Page



Confirmation Popup



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate



On this screen:

- Select the **Termination Date** from the **Calendar**
- Select the **Termination Reason** from the dropdown list
- Click **Submit**

Screen

EVALUATING APPLICATION

Show 10 entries Search:

| Applicant Name | Application Type | Application Reference Number | Agreement Created Date | Status | Action |
|--------------------|------------------------|------------------------------|------------------------|--------------|----------------------|
| Phumzile Buthelezi | Individual Application | HSD2023021900001 | 2023/02/19 8:21:22 PM | Active Lease | View |

Showing 1 to 1 of 1 entries

Previous 1 Next

Termination Date *

Termination Reason *

© 2023 - PLM v1.0

Agreement to Terminate Lease

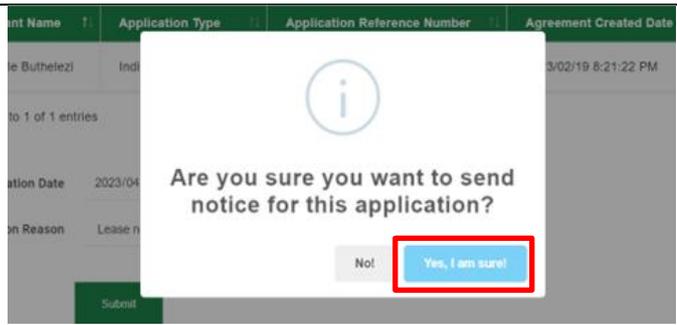
Navigate



On this screen:

- A confirmation popup box will display, **Are you sure you want to send notice for this application?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Agreement of Lease Termination** page, with a **Success** notification displayed.
- Click **Ok** to remove popup.

Screen



Confirmation Popup



Success Notification

You have now successfully completed this sub-section

24 SENDING OUT A COMMUNICATION



After completing this sub-section, you will be able to send out communications to tenants.



Communication can be sent to:

- An Individual Tenant
- Per Complex

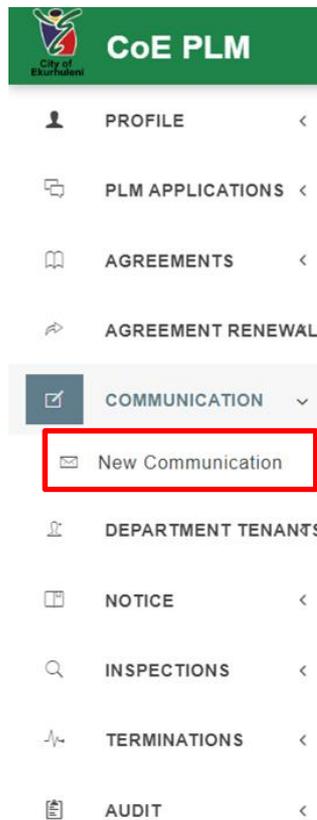
Navigate



On this screen:

- Click **Communications** dropdown arrow on the navigation panel.
- Click **New Communication**
- You will be navigated to the **New Communication** page.

Screen



Navigation Panel



- Clicking on the **Communication Type** radio button enables additional fields to appear.
- **Communication Method** is automatically defaulted with all 3 ticked, however you can select which method of communication you prefer.

Navigate



On this screen:

- Select the **Communication Type** radio button of choice.
- Tick/ Untick **Communication Method**
- Based on the **Communication Type**, you have to select the **To Tenant** name/ **Per Complex** name.
- Capture the **Message Title**
- Capture the **Message Body**
- Click **Send Message**

Screen

New Communication

Send Tenant Communication

Communication Type Individual Per Complex

Send Message/s

New Communication Page

New Communication

Send Tenant Communication

Communication Type Individual Per Complex

Communication Method SMS *
 EMAIL
 POSTAL

To Tenant Select Tenant Name v *

Message Title *

Message Body *

Send Message/s

New Communication

New Communication

Send Tenant Communication

Communication Type Individual Per Complex

Communication Method SMS EMAIL POSTAL

To Tenant Phumzile Buthelezi

Message Title Test

Message Body Test

Send Message/s

New Communication

Navigate



On this screen:

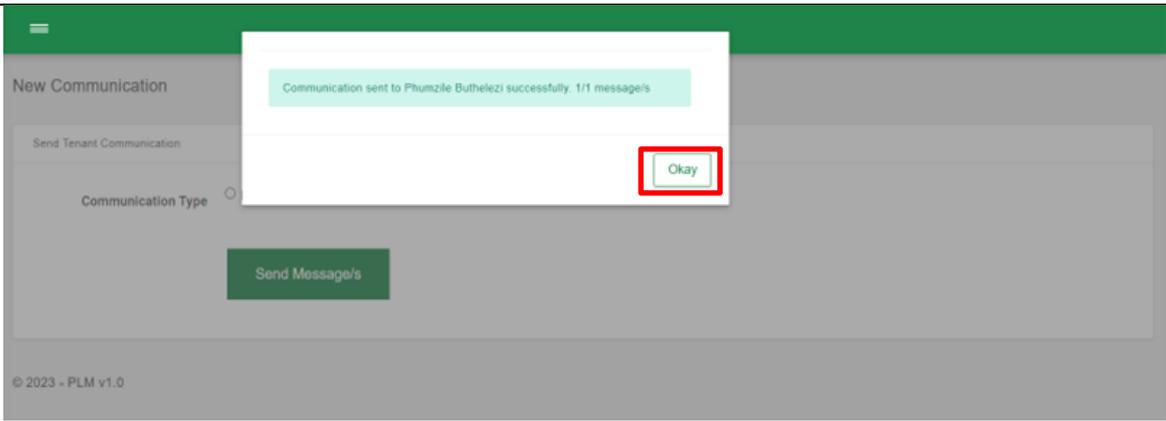
- A confirmation popup box will display, **Are you sure you want to send this message?** Click **Yes, I am sure!** to acknowledge.
- A **Communication Sent** notification will display.
- Click **Ok** to remove popup.

Screen

Are you sure you want to send this message?

No! Yes, I am sure!

Confirmation Popup



Communication Sent Notification

You have now successfully completed this sub-section

25 LOG OFF



After completing this sub-section, you will be able to logout of the PLM system.

Navigate



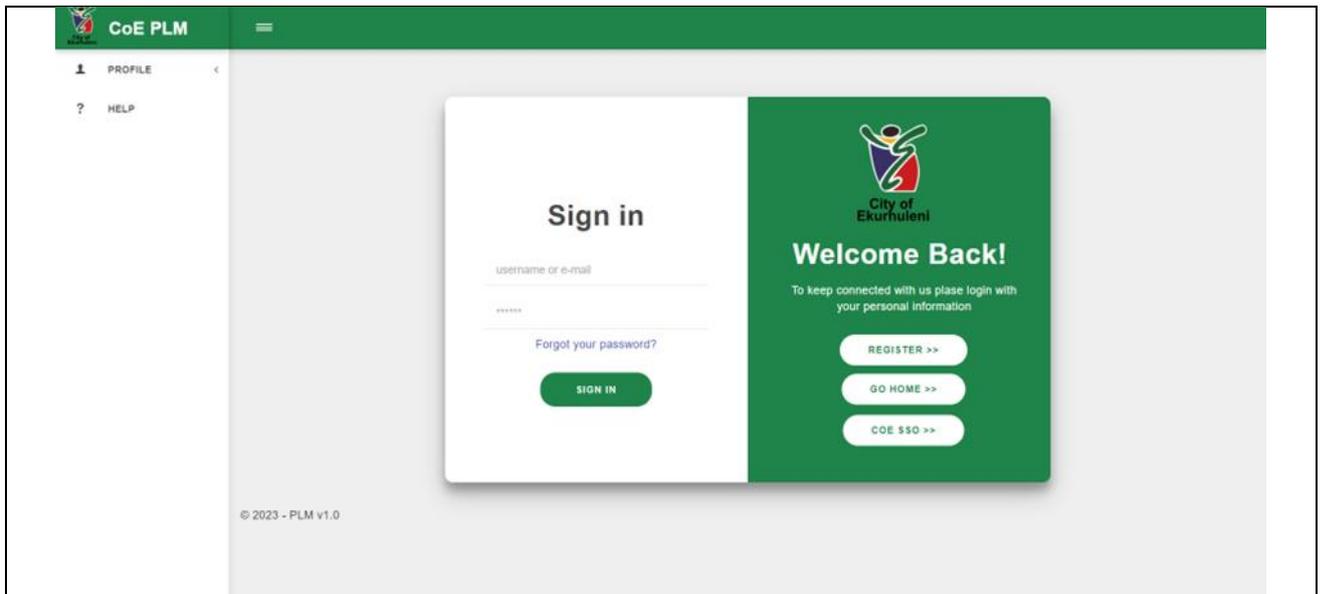
On this screen:

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

Screen

The screenshot shows the CoE PLM navigation panel. At the top, there is a green header with the CoE PLM logo and the text 'CoE PLM'. Below the header, there is a user profile section with a person icon, the text 'PROFILE', and a dropdown arrow. Underneath, the user's name 'SOLARTEST12' is displayed. The 'LOG OFF' option is highlighted with a red box. Below this, there is a list of navigation items, each with an icon and a dropdown arrow: 'PLM APPLICATIONS', 'AGREEMENTS', 'AGREEMENT RENEWAL', 'COMMUNICATION', 'DEPARTMENT TENANTS', 'NOTICE', 'INSPECTIONS', 'TERMINATIONS', and 'AUDIT'.

Navigation Panel



Sign In Page

You have now successfully completed this sub-section

26 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. |
| Search: <input type="text"/> | The Search functionality enables you to filter the table with the results of 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. |

27 ASSESSMENTS OF SPECIFIC LEARNING OUTCOMES

| Description of Learning Outcomes | | |
|-------------------------------------|------------------|-----------------|
| Were you able to? | Yes Tick ✓ | No Tick ✓ |
| LOGIN TO PLM | | |
| SUBMITTING A LEASE APPLICATION FORM | | |
| ADDING AN OCCUPANT TO THE LEASE | | |
| TRANSFERRING A LEASE | | |
| RECOMMENDING FOR LEASE RENEWAL | | |
| ACCEPTING A LEASE RENEWAL | | |
| RENEW LEASE | | |
| GENERATING A LEASE AGREEMENT | | |
| SIGNING AN AGREEMENT OF LEASE | | |
| FINALIZE LEASE AGREEMENT | | |
| TENANT SERVING NOTICE | | |
| NOTICED AGREEMENTS | | |
| CONDUCT UNIT INSPECTION | | |
| CONDUCT UNIT VACATED INSPECTION | | |
| AGREEMENT OF LEASE TERMINATION | | |
| SENDING OUT A COMMUNICATION | | |
| LOG OFF | | |

28 NEXT STEPS

You will be required to complete the following:

| | |
|---|---------------------|
|  | Training Evaluation |
|  | Assessment |



© 2020 City of Ekurhuleni

All rights reserved

Published by:
Communications and Brand Management
Department
Private Bag X1069,
Germiston,
1400,
South Africa

Find us on:

- 🌐 www.ekurhuleni.gov.za
- 🐦 @CoE_Ekurhuleni
- 🐦 @CoE_Call_Centre
- 📘 www.facebook.com/CityOfEkurhuleni

Ekurhuleni Call Centre: 0860 54 3000
Helpline: 011 458 091110177

