ERP Functional USER MANUAL

Training Manual
Property Lease Management
Human Settlement
Regional Manager

mSCOA ERP

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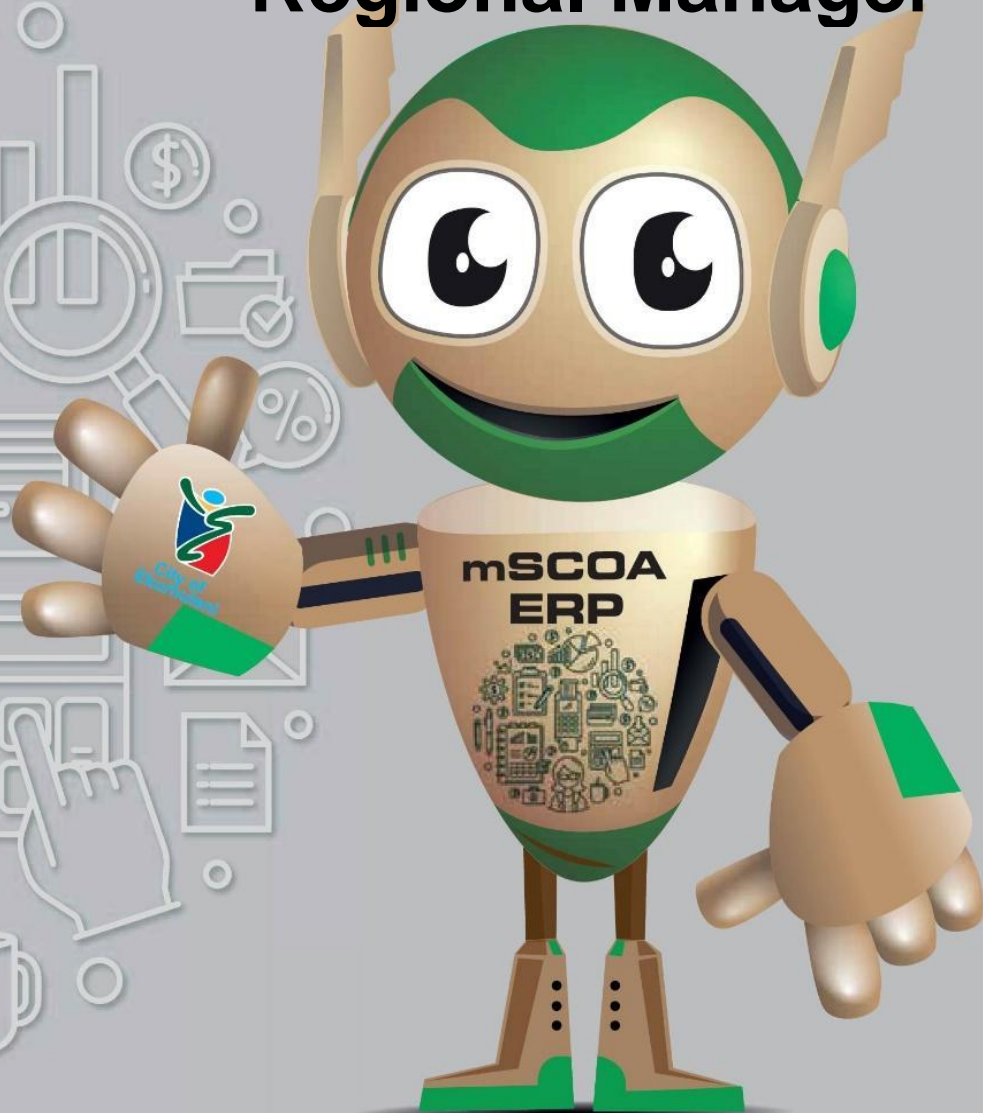
OUR JOURNEY TO A SMART DIGITAL CITY

TABLE OF CONTENTS

1 OVERVIEW

● 1.1 INTRODUCTION

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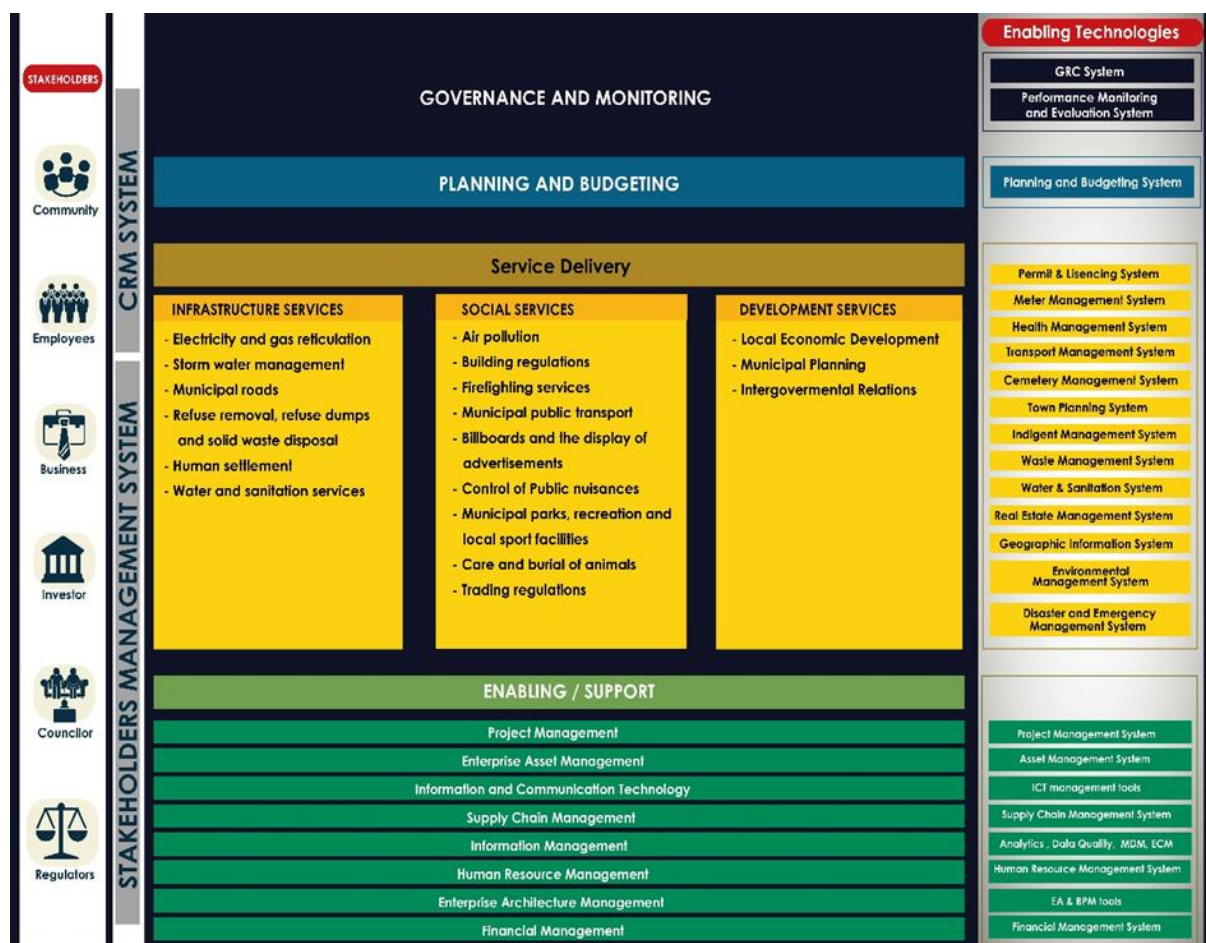

Figure 1: City Model

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.
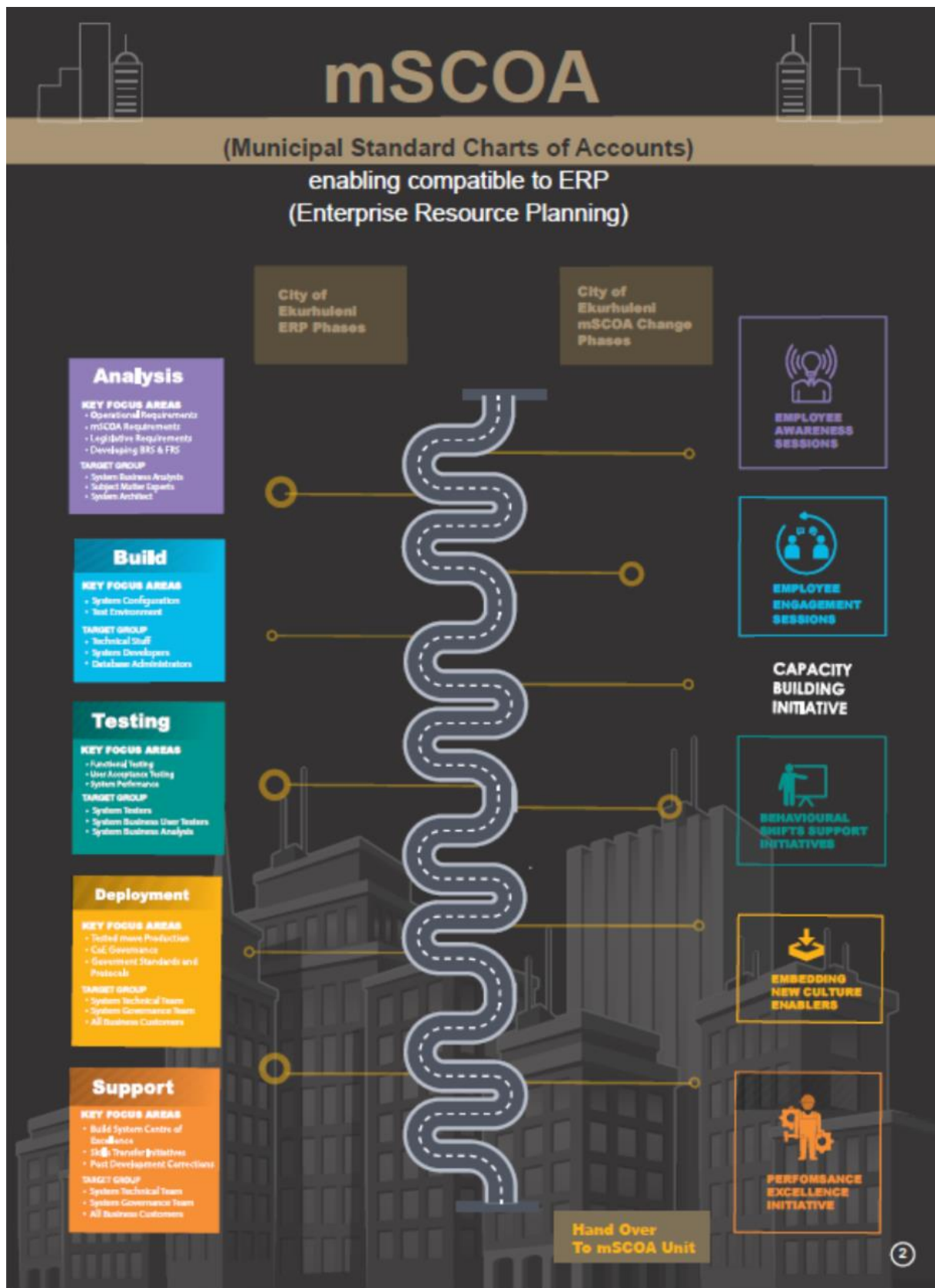
2 GENERAL SYSTEM INFORMATION

Property Letting is one of the revenue generating streams within 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 system.
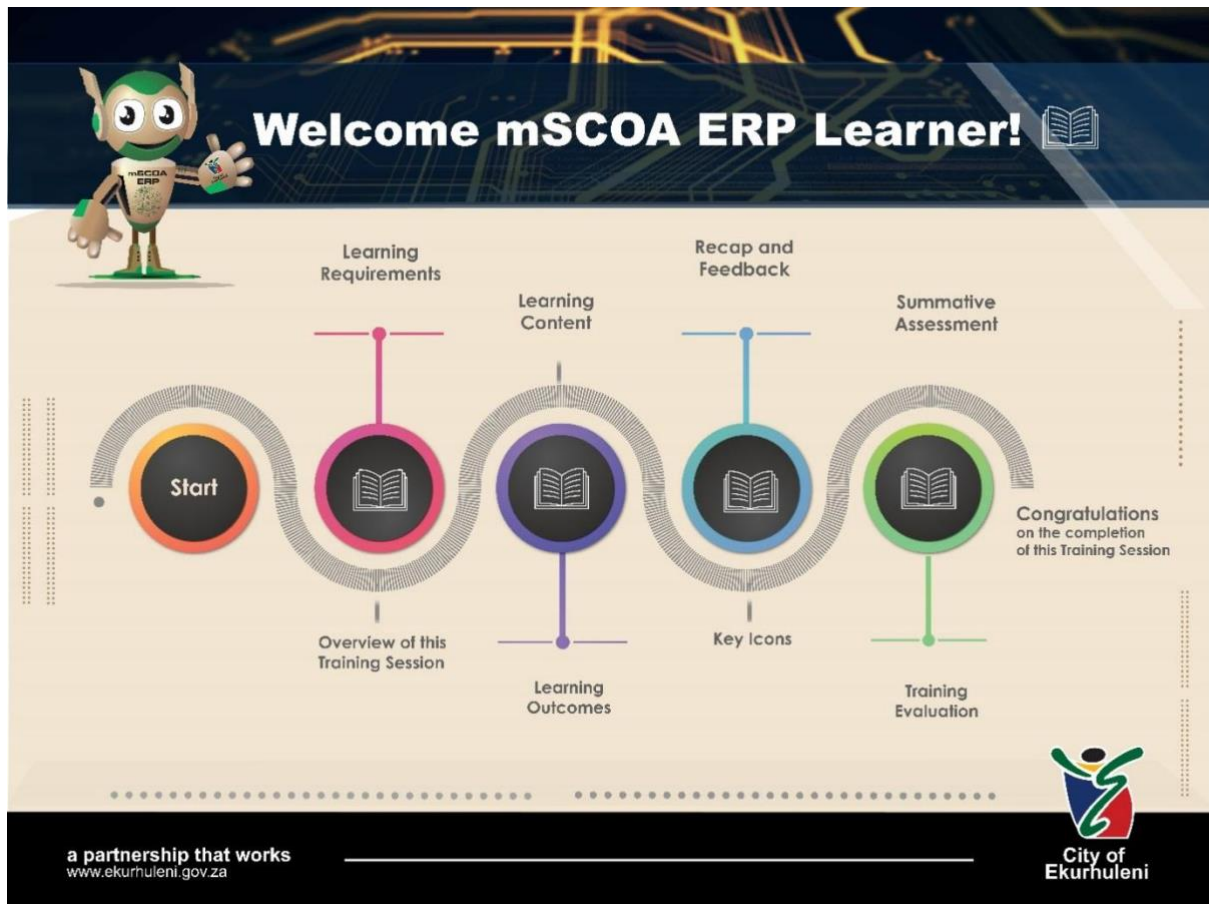

This User Guide is intended for the following audience:

● Regional Manager

4 LEARNING EXPECTATIONS

Understand System Concepts:

● System Login
● Approve Lease Renewal
● Approve Agreement of Lease

6 KEY AREAS OF LEARNING

1	LOGIN TO PLM
2	APPROVE LEASE RENEWAL
3	APPROVING AN AGREEMENT OF LEASE
4	SENDING OUT A COMMUNICATION
5	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 Regional Manager opens 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 APPROVE LEASE RENEWAL

After completing this sub-section, you will be able to review and action the lease renewal.

- Tenant lease is due to lapse in the next 3 months, and the tenant qualifies for renewal or extension.

- For you to review the lease renewal, the status must be "In Awaiting Agreement Recommendation Approval".
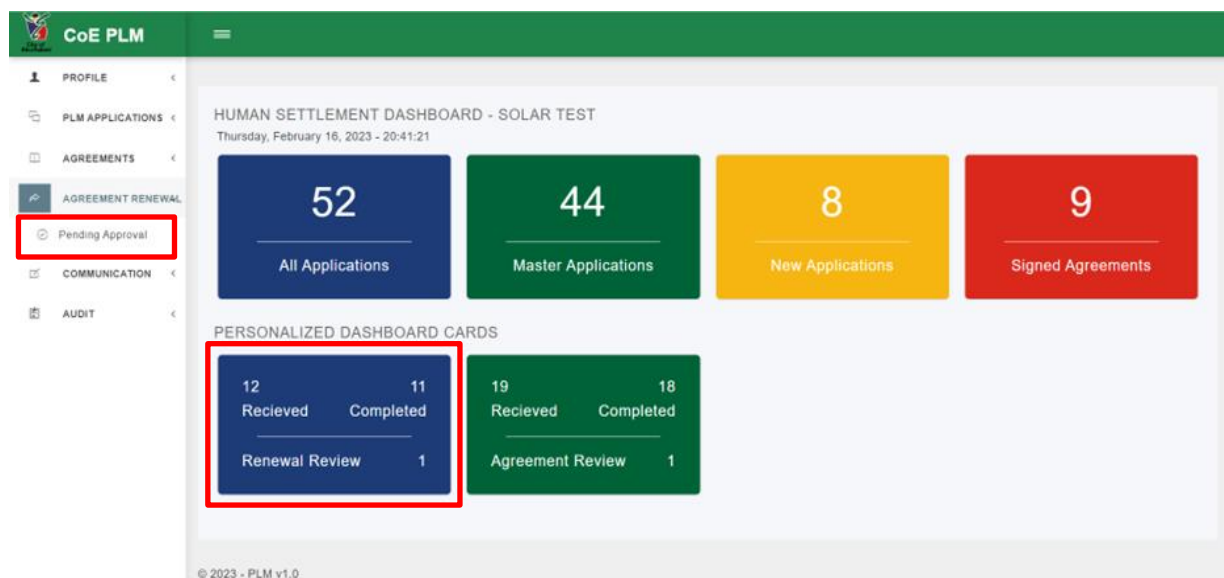
Navigate

On this screen:

- Click **Renewal Review** on the Dashboard.

- You will be navigated to the **Awaiting Recommendation Approval** page.

OR

- Click **Agreement Renewal** dropdown arrow on the navigation panel.

- Click **Pending Approval**

- You will be navigated to the **Awaiting Recommendation Approval** page.

Screen

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.

AWAITING RECOMMENDATION APPROVAL

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 Recommendation Approval	Review
shevek poonsamy	Individual Application	HSD2022100700006	2022/10/07 4:28:12 PM	In Awaiting Agreement Recommendation Approval	Review
Siyanda Ngxongo	Individual Application	HSD2022082900008	2022/08/29 2:44:01 PM	In Awaiting Agreement Recommendation Approval	Review

Showing 1 to 3 of 3 entries   Previous 1 Next

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Awaiting Recommendation Approval 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
	• You are also able to view the Agreement Renewal Recommendation/s sub-sections.

Navigate

	On this screen:
	• Select the **Outcome** as **Approved**
	• Input **Comments** in the text field provided.
	• Click on the **Submit** button

Screen

Approve Lease Renewal

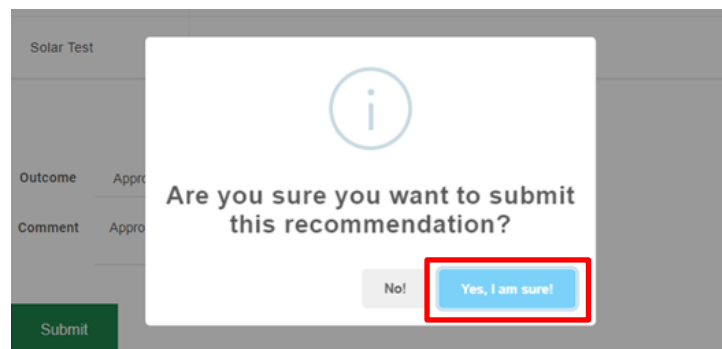

Approve Lease Renewal

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 Recommendation Approval** page.

Screen

Confirmation Popup

Awaiting Recommendation Approval Page

	• The lease will leave your work queue and will be sent to the Housing Liaison Officer. • The tenant will be notified of the renewal and will receive an OTP.

You have now successfully completed this sub-section

11 APPROVING AN AGREEMENT OF LEASE

	After completing this sub-section, you will be able to approve the agreement of lease.
	In order for you to approve the agreement of lease, the status must be "In Awaiting Lease Agreement Approval".

Navigate

	On this screen: • Click **Agreement Review** on the Dashboard. • You will be navigated to the **Awaiting Agreement Approval** page. OR • Click **Agreements** dropdown arrow on the navigation panel. • Click **Agreement Approval** • You will be navigated to the **Awaiting Agreement Approval** page.

Screen

Navigation Panel and Dashboard

Navigate

	On this screen:
	• Click **View Agreement** button on the line item of choice.
	• You will be navigated to the respective page.

Screen

AWAITING AGREEMENT APPROVAL

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 Lease Agreement Approval	View Agreement
shevek poonsamy	Individual Application	HSD2022102700011	2022/10/27 2:47:25 PM	In Awaiting Lease Agreement Approval	View Agreement
Simelokwethu Nhleko	Individual Application	HSD2022101400001	2022/10/14 9:45:10 AM	In Awaiting Lease Agreement Approval	View Agreement

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

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Awaiting Agreement Approval 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
	• Rejected Outcome:
	- Requires the user to input a reason for rejection in the Comments field - Sends Notification to the Housing Liaison Officer and Senior Housing Specialist about the rejection. - Routes the Lease Agreement to the Housing Liaison Officer's Agreement Update queue.

Navigate

	On this screen:
	• Under **Generated Lease Agreement** 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**
	• 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 Lease Agreement Approval	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	Action	
Agreement Of Lease	View	Signature	-- Select Option -- ∨ *

Approving a Lease Agreement

Agreement of Lease

Approving a Lease Agreement

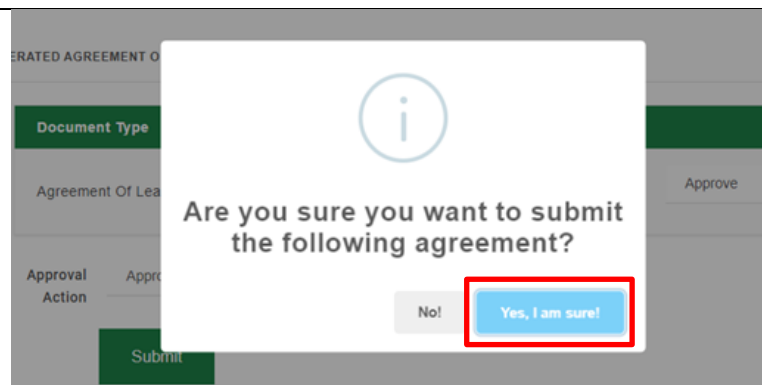

Approving a Lease Agreement

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 Approval** page.

Screen

Confirmation Popup

Awaiting Agreement Approval Page

| | The Lease Agreement will move to the Housing Liaison Officer's work queue for the Applicant's signature. |

You have now successfully completed this sub-section

12 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

CoE PLM

- PROFILE
- PLM APPLICATIONS
- AGREEMENTS
- AGREEMENT RENEWAL
- COMMUNICATION
  - New Communication
- AUDIT
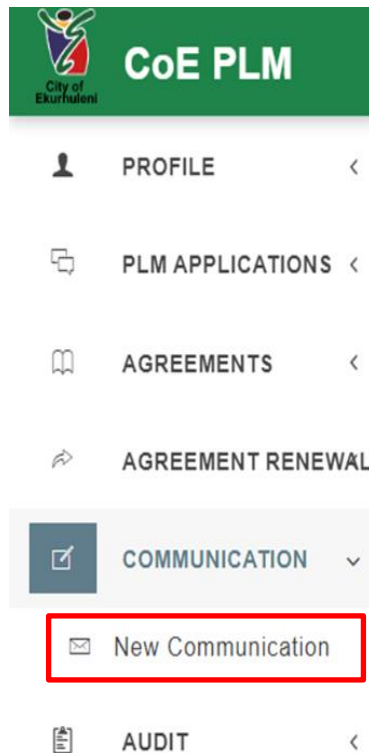
Navigation Panel

💡	- 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.

<table>
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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**

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</table>

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<td>

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 ⌄   *

Message Tittle   *

Message Body   *

Send Message/s

New Communication

</td>
</tr>
</table>

New Communication

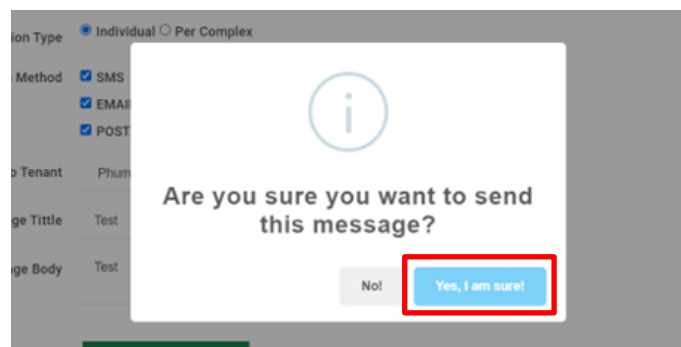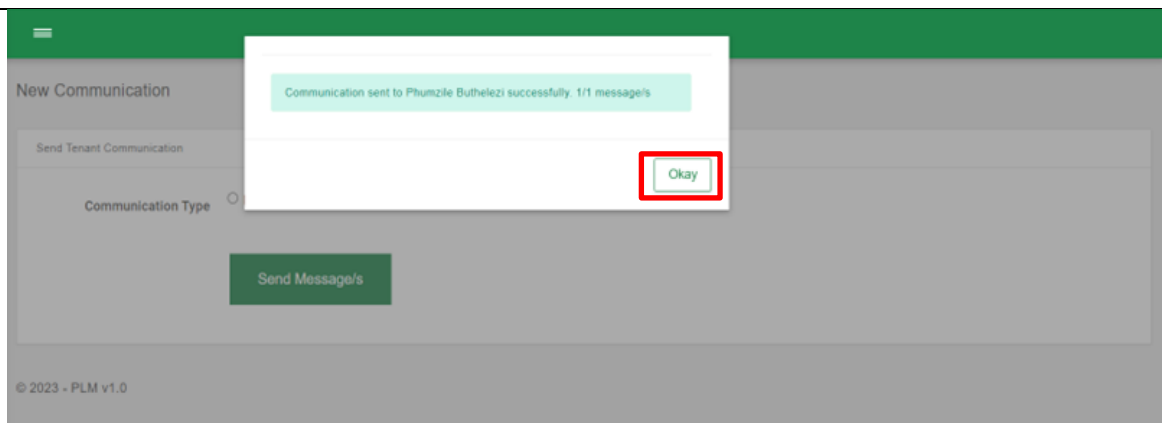| Navigate |
| --- |

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

Confirmation Popup

Communication Sent Notification

You have now successfully completed this sub-section

13 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

Navigation Panel

Sign In Page

You have now successfully completed this sub-section
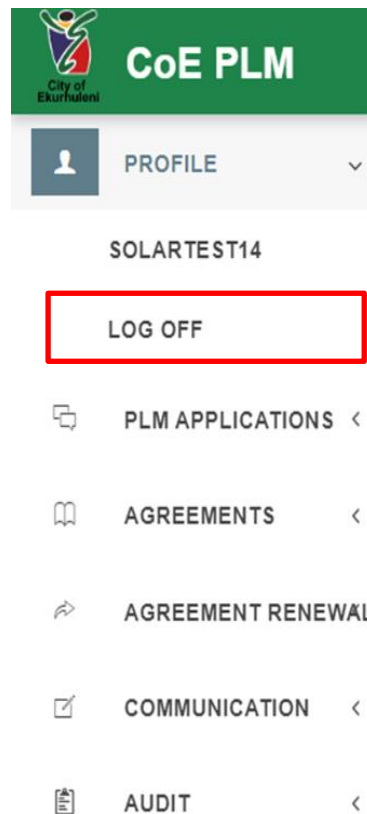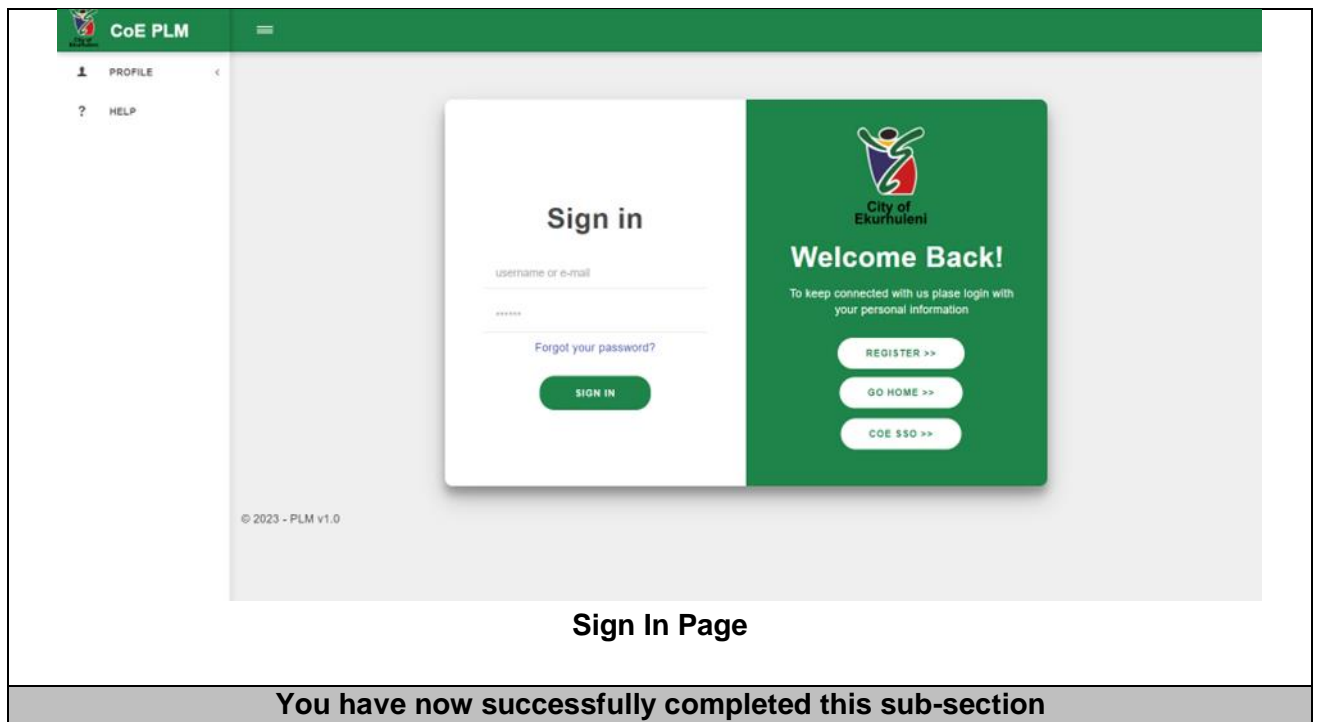
14 HELPFUL HINTS

- Be able to find useful guidelines throughout the application:

Screen	Navigate
CoE PLM	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.
Browse	The Browse button allows you to search your computer to find the relevant document that you would like to upload.
Search:	The Search functionality enables you to filter the table with the results of what you are looking for.
View	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.

15 ASSESSMENTS OF SPECIFIC LEARNING OUTCOMES

Description of Learning Outcomes		
Were you able to?	**Yes Tick** ✓	**No Tick** ✓
LOGIN TO PLM		
APPROVE LEASE RENEWAL		
APPROVING AN AGREEMENT OF LEASE		
SENDING OUT A COMMUNICATION		
LOG OFF		

16 NEXT STEPS

You will be required to complete the following:

	Training Evaluation
	Assessment