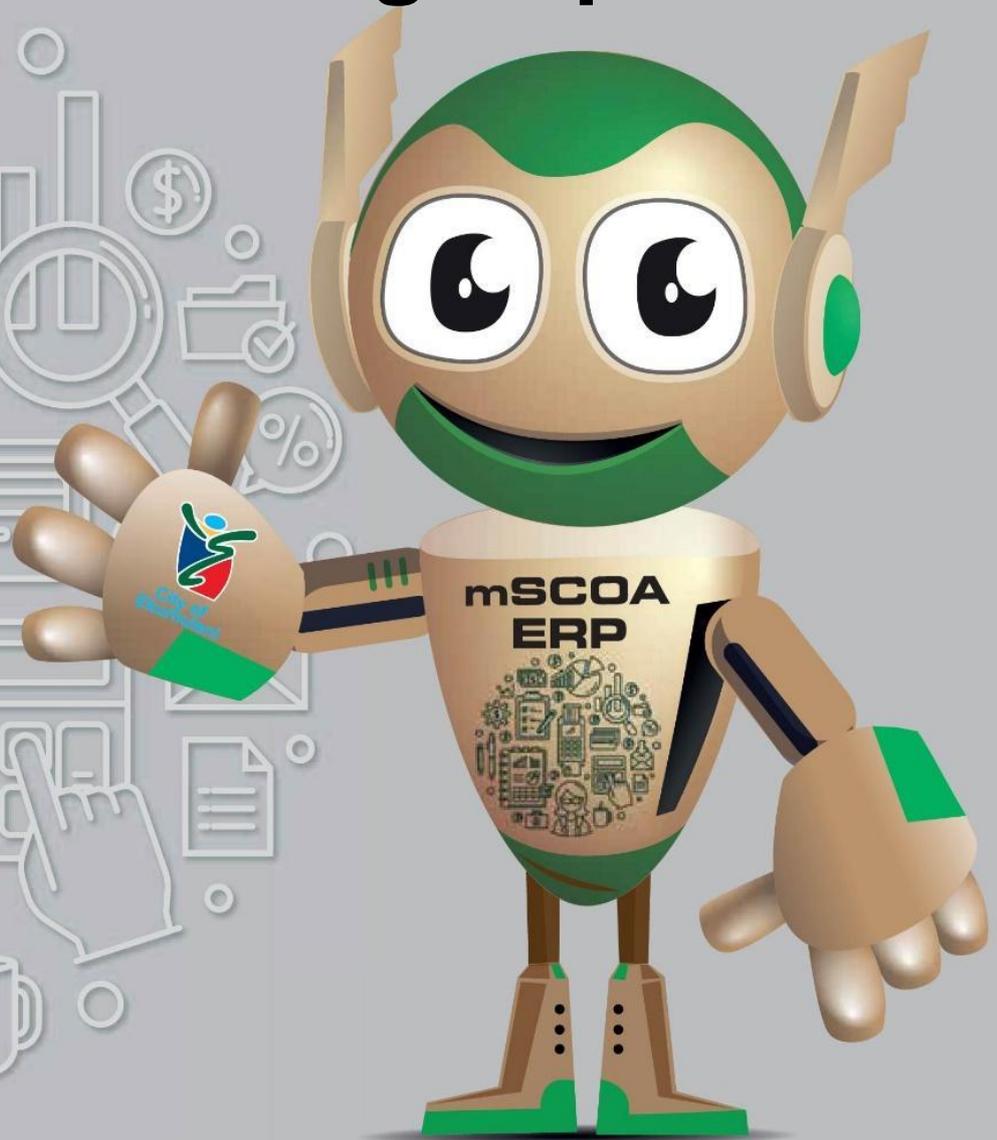


ERP Functional USER MANUAL

Training Manual

Property Lease Management Housing Supervisor



OUR JOURNEY
TO A SMART DIGITAL CITY



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1 OVERVIEW

1.1 INTRODUCTION

City of Ekurhuleni (COE) has a mandate to promote the Smart City concept for transformation, growth, development and ensure that all Ekurhuleni's citizens derive sustainable benefit from technology development. The Information and Communication Technology (ICT) department has a responsibility to ensure that ICT goals are aligned to and support the City's mission and strategic objectives of becoming 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.

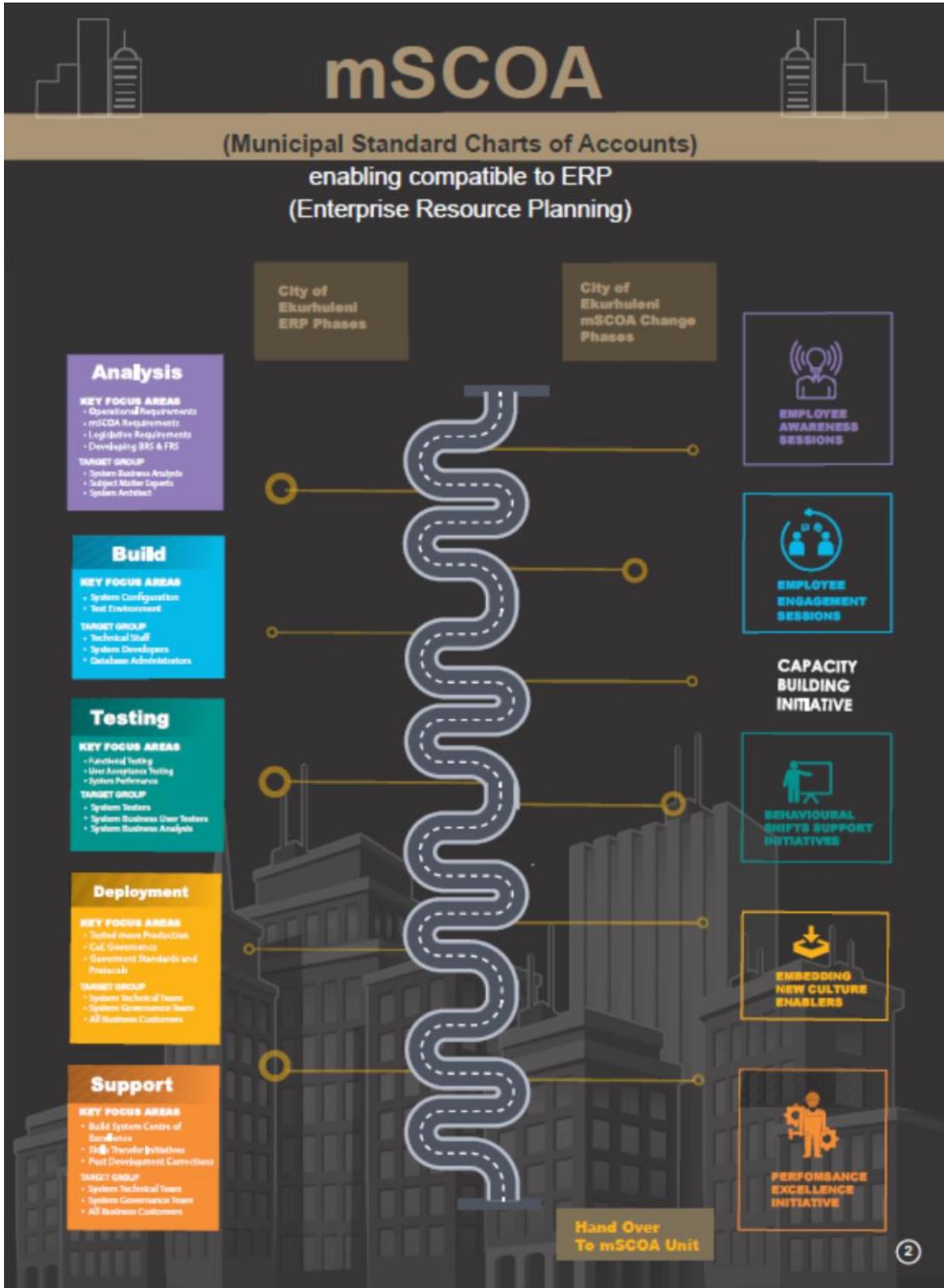
Strategy capability is responsible for all planning and budget related capability for the CoE municipality. Evaluating existing business unit strategy based on the company's strategy and eliminate unwanted/unnecessary resources/elements and re-consider necessary resources to meet the overall company's 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 EHC, which is an entity owned by the city, its mandate is to manage the leasing of city owned flats, which are for social housing to people earning between R3500 and R15 000. EHC does not have any system to support their leasing function. Most of the processes are still managed manually using spreadsheets which has negative effect on operations and the reporting thereof. There is a need to implement a fully integrated system, that will support the Property Lease Management capability end to end for EHC.

3 LEARNING REQUIREMENTS

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

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

This User Guide is intended for the following audience:

- Housing Supervisor

4 LEARNING EXPECTATIONS

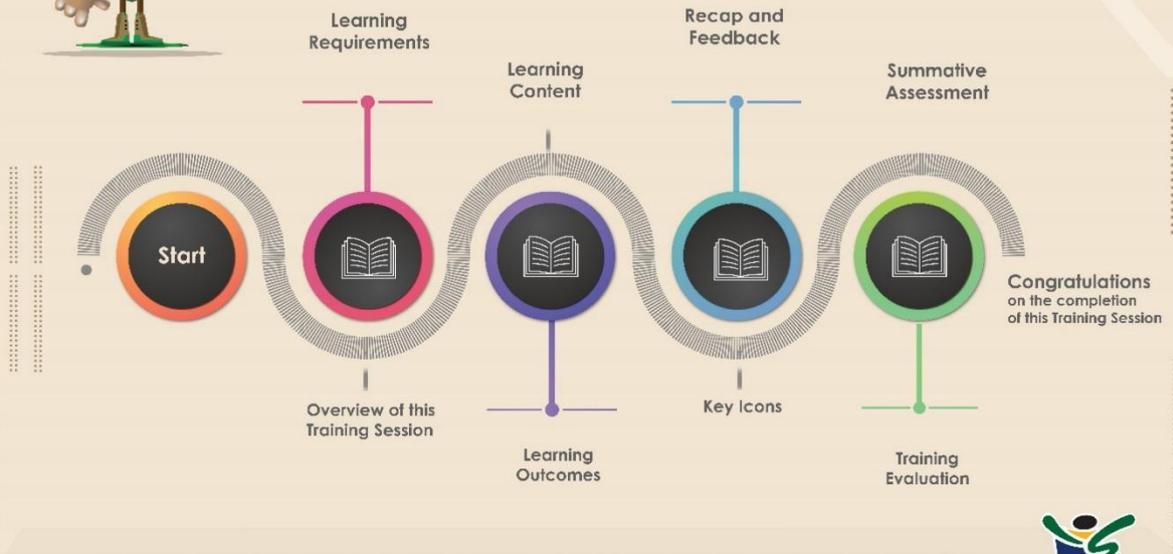
Understand System Concepts:

- System Login
- Schedule Unit Inspection
- Conduct Unit Inspection
- Conduct Unit Vacated Inspection

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	SCHEDULING A UNIT INSPECTION
3	CONDUCTING UNIT INSPECTION
4	CONDUCT UNIT VACATED INSPECTION
5	CONFIRM TENANT VACATED

7 LEARNING OUTCOMES

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

- Navigate the Property Lease Management system (PLM).
- 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 as the Revenue Officer.



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



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

Navigate



On this screen:

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

Screen



CoE PLM Landing Page - Profile

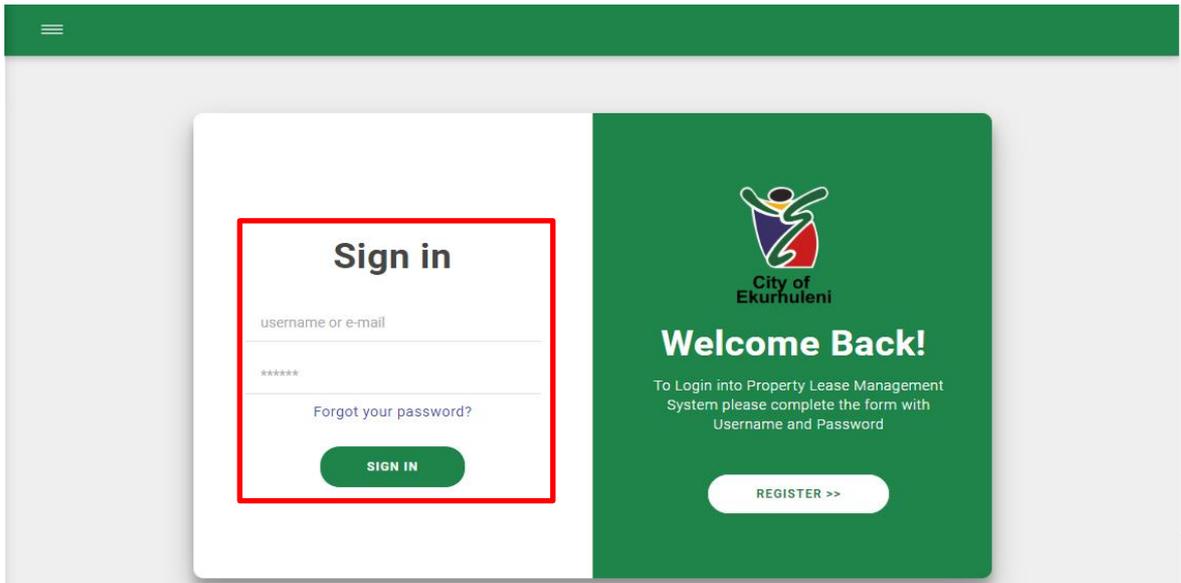
Navigate



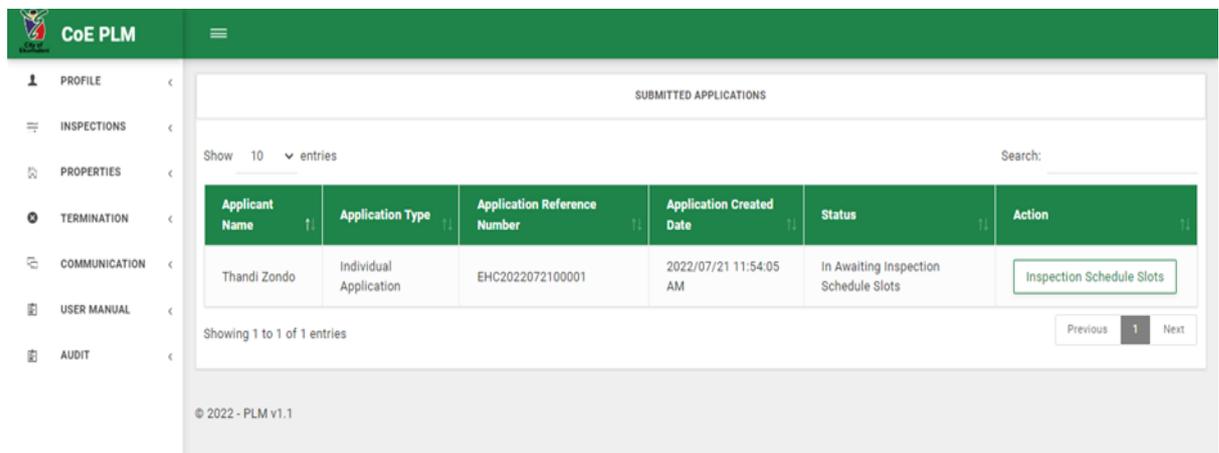
On this screen:

- Enter your active directory **Username** and **Password**
- Click on the **Sign In** button
- You will be navigated to the **Submitted Applications** page.

Screen



Sign In Page



Submitted Applications Page

You have now successfully completed this sub-section

10 SCHEDULING A UNIT INSPECTION



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



Once the customer has attended training, the Housing Supervisor will need to schedule available days for the inspection to be conducted with the customer/tenant.



The application status will be In Awaiting Inspection Schedule Slots.

Navigate

On this screen:



- Once logged in, you will be on the **Submitted Applications** page.

OR

- Select **Inspection** under the **Inspections** item on the navigation panel.
- You will be navigated to the **Submitted Applications** page.
- Click the **Inspection Schedule Slots** button on the application of choice.
- You will be navigated to the **Schedule Inspection** page.

Screen

The screenshot shows the CoE PLM system interface. The left navigation panel has 'Inspection' highlighted under the 'INSPECTIONS' category. The main content area displays a table of 'SUBMITTED APPLICATIONS' with one entry for Thandi Zondo. The 'Action' column for this entry contains a button labeled 'Inspection Schedule Slots', which is highlighted with a red box. The table has the following data:

Applicant Name	Application Type	Application Reference Number	Application Created Date	Status	Action
Thandi Zondo	Individual Application	EHC2022072100001	2022/07/21 11:54:05 AM	In Awaiting Inspection Schedule Slots	Inspection Schedule Slots

Invite Clients For Training Page

Navigate



On this screen:

- Under **Application Details** sub-section, clicking on the **View** button gives you access to view information on the application, such as:
 - Application Details
 - Applicant Details
 - History
 - Documents

Screen

Instructions

Select the day and hours of your availability.
Then click "Add timeslots".
To delete schedule click the "row" on the schedule table.

APPLICATION DETAILS

Applicant	Application Type	Application Reference No.	Application Created Date	Status	Action
Thandi Zondo	Individual Application	EHC2022072100001	2022/07/21 11:54:05 AM	In Awaiting Inspection Schedule Slots	View

Application Details



To delete a date scheduled or timeslot, click on the  Delete button.

Navigate



On this screen:

- Under the **Unit Inspection Slots** sub-section, your **First Name** and **Surname** will be displayed in the relevant fields.
- In order to capture the **Day Available**, you will need to click on the **Calendar** and make a selection.
- Select the **Hours Available** by ticking the time checkbox(es).
- Tick on the **Add Timeslots** button
- All **Entries** will be displayed in the table on the right.
- To capture another day with timeslots, follow the same process mentioned above.

- Once all entries are reflecting, click **Submit**.
- You will be re-directed to the **Submitted Applications** page.

Screen

Unit Inspection Slot

First Name: Mamoepi

Surname: RMM

Day Available * 2022/08/15

Hours Available *

- 08H00 To 09H00
- 09H00 To 10H00
- 10H00 To 11H00
- 11H00 To 12H00
- 12H00 To 13H00
- 13H00 To 14H00
- 14H00 To 15H00
- 15H00 To 16H00
- 16H00 To 17H00

Cancel Add Timeslots Submit

Unit Inspection Slots

Unit Inspection Slot

First Name: Mamoepi

Surname: RMM

Day Available * yyyy/mm/dd

Hours Available *

- 08H00 To 09H00
- 09H00 To 10H00
- 10H00 To 11H00
- 11H00 To 12H00
- 12H00 To 13H00
- 13H00 To 14H00
- 14H00 To 15H00
- 15H00 To 16H00
- 16H00 To 17H00

Show 10 entries

Date To Schedule	Time Slot	Action
2022/08/15	10H00 To 11H00	
2022/08/15	11H00 To 12H00	
2022/08/15	14H00 To 15H00	

Showing 1 to 3 of 3 entries

Previous 1 Next

Cancel Add Timeslots Submit

Entries Displayed on the Right

SUBMITTED APPLICATIONS

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

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Submitted Applications Page



- The Customer will be notified that their application is due for a unit inspection.
- The application will be moved to the Customer's queue.

You have now successfully completed this sub-section

11 CONDUCTING UNIT INSPECTION



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

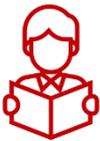


- Once you the customer has agreed to meet with you to conduct the unit inspection, you are required to download the inspection template from the PLM system.
- Complete the inspection form manually onsite and thereafter upload the Inspection report on the system.



The application status will be Conduct Unit Inspection.

Navigate



On this screen:

- Under the **Submitted Applications** list, click **Conduct Unit Inspection** button, on the application of choice.
- You will be navigated to the **Unit Inspection** page.

Screen

SUBMITTED APPLICATIONS

Show 10 entries Search:

Applicant Name	Application Type	Application Reference Number	Application Created Date	Status	Action
Thandi Zondo	Individual Application	EHC2022072100001	2022/07/21 11:54:05 AM	Conduct Unit Inspection	Conduct Unit Inspection

Showing 1 to 1 of 1 entries Previous 1 Next

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Submitted Applications Page

Navigate



On this screen:

- Under **Application Details** sub-section, clicking on the **View** button gives you access to view information on the application, such as:

- Application Details
- Applicant Details
- History
- Documents

- Click on the **Download** button, to download the Unit Inspection Template.
- Select the template from your downloaded computer file for viewing and print.

Screen

The screenshot shows a web interface for evaluating applications. At the top, there is a green header with a menu icon. Below it, the title 'EVALUATING APPLICATION' is displayed. A search bar and a 'Show 10 entries' dropdown are visible. The main content is a table with the following columns: Reference Number, Applicant Type, Status, Captured Date, Customer Name, and Action. A single entry is shown with Reference Number EHC2022072100001, Applicant Type Individual Application, Status Conduct Unit Inspection, Captured Date 2022/07/21 11:54:05 AM, and Customer Name Thandi Zondo. The 'View' button in the Action column is highlighted with a red box. Below the table, it says 'Showing 1 to 1 of 1 entries' and has 'Previous', '1', and 'Next' navigation buttons. Underneath, there is a section titled 'CONDUCT UNIT INSPECTION TEMPLATE' with a table containing Document Type, Link, and Description. The 'Download' button in the Link column is highlighted with a red box.

Conduct Unit Inspection Template

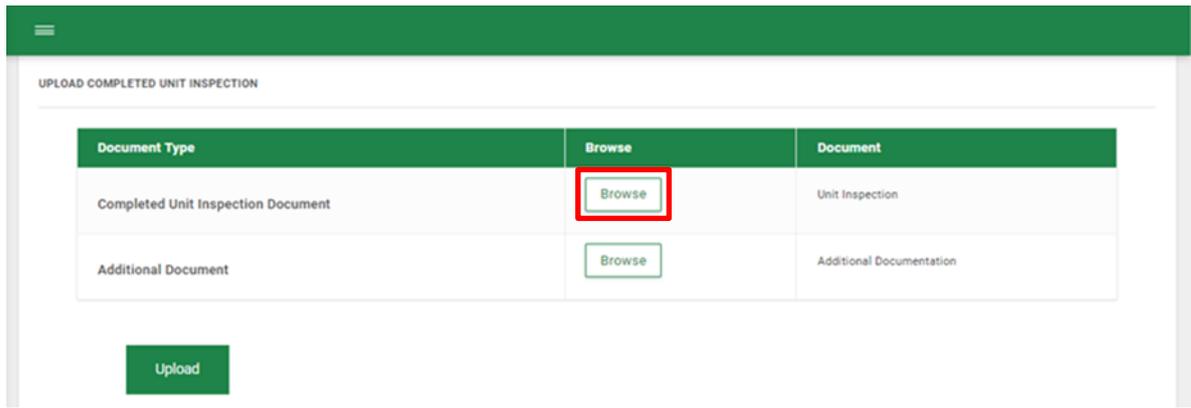
Navigate

On this screen:

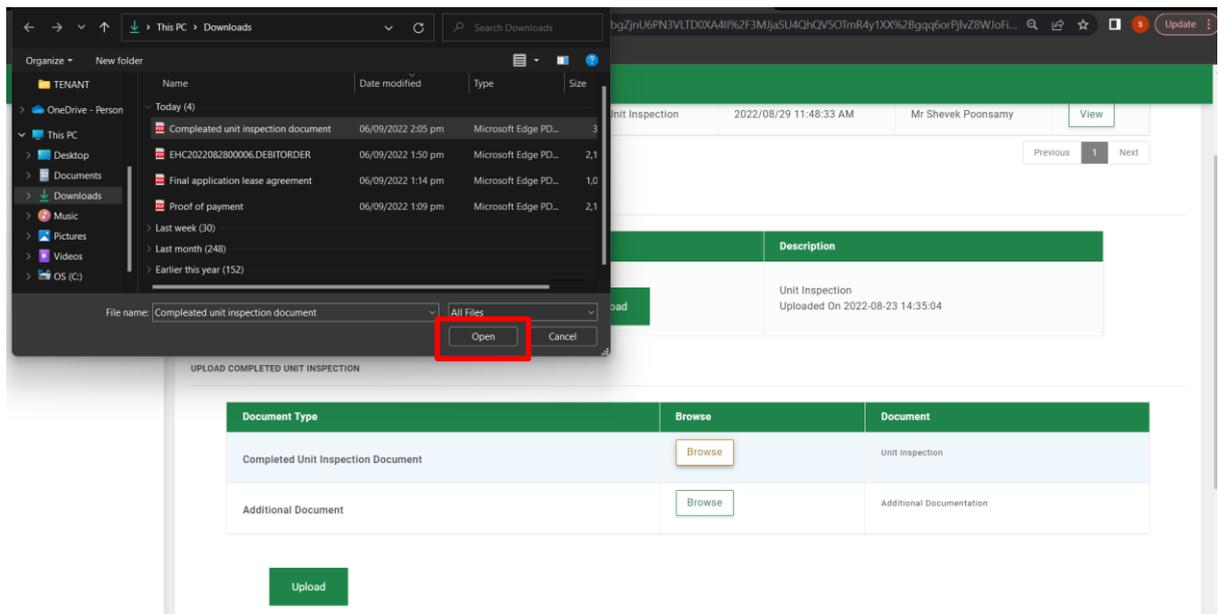
- Click on the **Browse** button, to upload the **Completed Unit Inspection Document**.
- Select the necessary document from your computer files.
- Click on the **Open** button
- The document will be attached, under the **Document** column.
- Click **Upload** to proceed with the upload.
- A popup notification will display: **Document(s) Uploaded**.
- Click **Ok** to remove popup box.
- The document name will change from black text to blue.



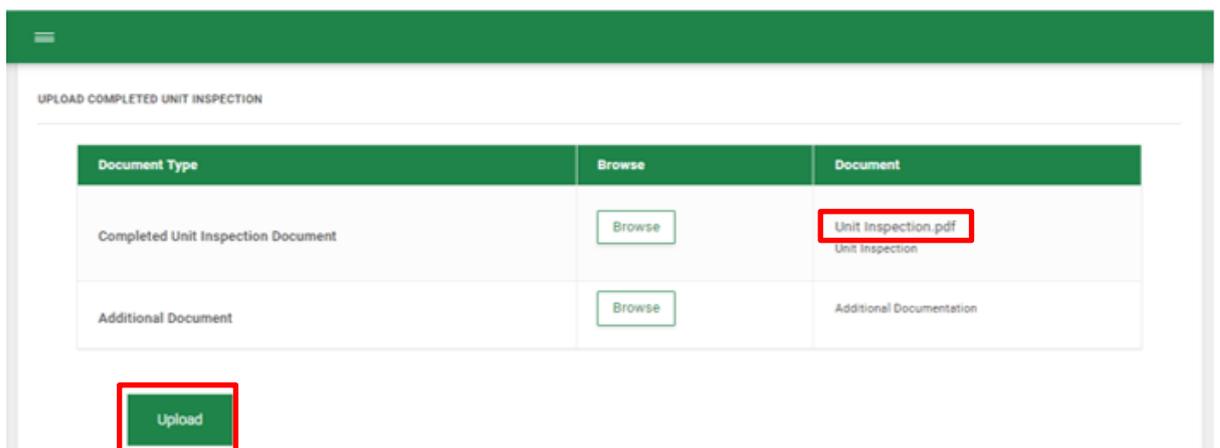
Screen



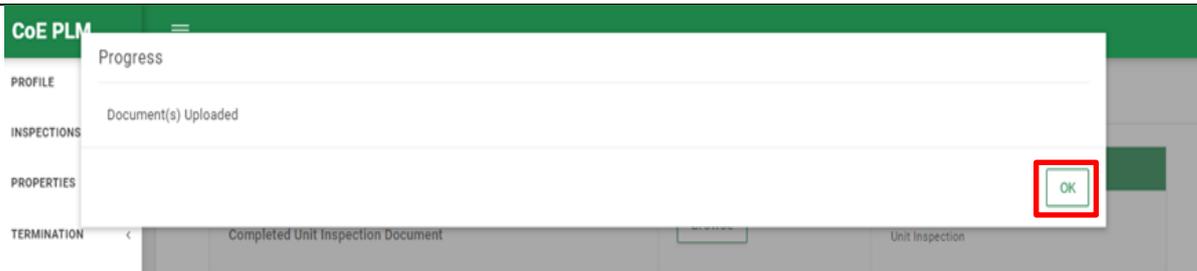
Upload Completed Unit Inspection Page



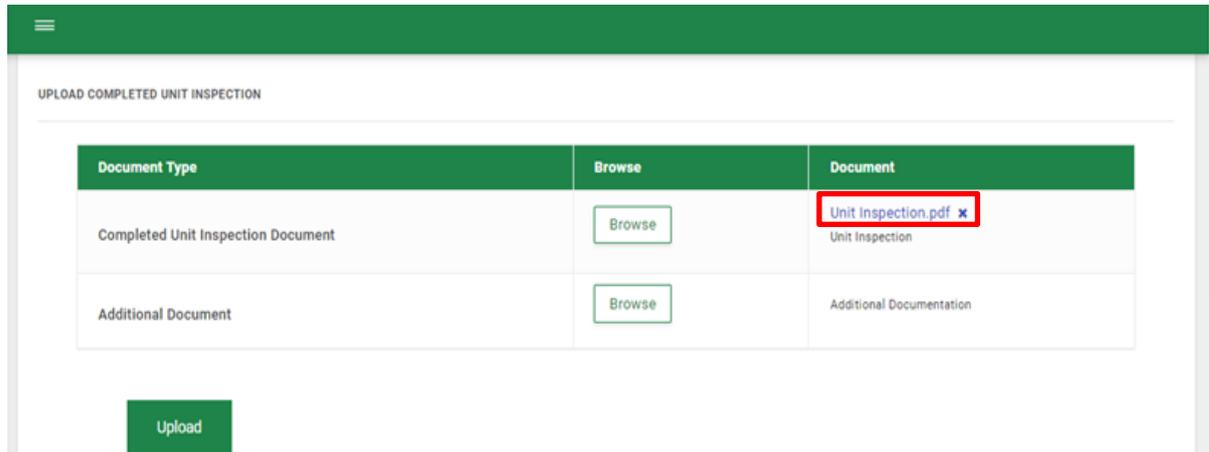
Selecting Document from Computer Files



Documents Attached



Progress Popup – Documents Uploaded



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 an **Outcome** (eg. Habitable – No Defects)
- Click **Submit**
- A confirmation popup box will display, **Are you sure you want to submit this unit inspection?**, Click **Yes, I am sure!** to acknowledge.
- You will be re-directed to the **Submitted Applications** page.

Screen

Outcome*

-- Select Option --

Submit

-- Select Option --
 Habitable - Minor defects
 Habitable - No defects
 Not Habitable

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Selecting an Inspection Outcome

Are you sure you want to submit this unit inspection?

No! Yes, I am sure!

Confirmation Popup

SUBMITTED APPLICATIONS

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 v1.1

Submitted Applications Page



- The Customer will be notified of the status: In Awaiting Tenant Update Details.
- The application will move to the Letting Officer's work queue.

You have now successfully completed this sub-section

12 CONDUCT UNIT VACATED INSPECTION



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



Once the Revenue Officer has validated the lease termination and account, you are required to conduct a unit inspection of whether the tenant has vacated the unit or not.



The application status will be Application Lease Termination Approved.

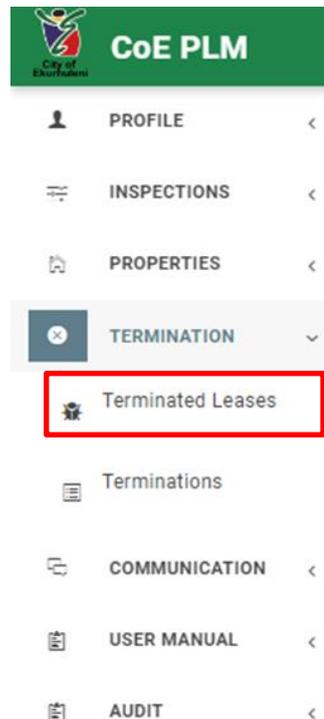
Navigate



On this screen:

- Click **Termination** dropdown arrow on the navigation panel.
- Click **Terminated Leases**
- You will be navigated to the **Terminated Lease Applications** page.

Screen



Navigation Panel

Navigate



On this screen:

- Click **Confirm Move-Out** button on the application of choice.
- You will be navigated to the relevant page.

Screen

Lease Reference No.	Tenant Name	Application Type	Lease Date	Status	Action
EHC2022072100001	Thandi Zondo	Individual Application	2022/08/11 2:26:15 PM	Application Lease Termination Approved	Confirm Move-Out

Showing 1 to 1 of 1 entries

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Tenants Application Termination Page

Navigate



On this screen:

- Under **Evaluating Application** sub-section, clicking on the **View** button, enables you to view the following information, such as:
 - Application Details
 - Applicant Details
 - History
 - Documents
- Under **Tenant Lease Details** sub-section, clicking on the **View** button, enables you to view the following information, such as:
 - Applicant Details
 - Lease Information
 - Tenants Details
 - Applicant History
 - Occupant History
 - Documents
- You will also have an overview of the **Terminate to Confirm**, such as:
 - Termination Date
 - Reason for Termination
 - Captured Date

- Termination By

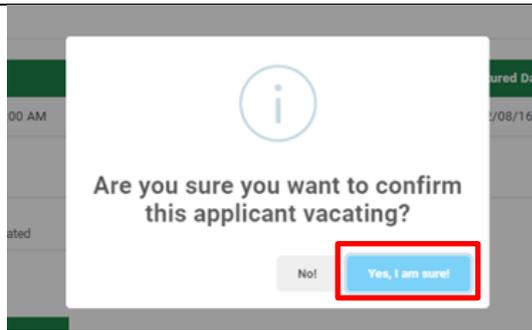
- Select a **Tenant Vacated** option from the dropdown list (eg. Vacated).
- Click on the **Submit** button
- A confirmation popup box will display, **Are you sure you want to confirm this applicant vacating?** Click **Yes, I am sure!** to acknowledge.
- You will be re-directed to the **Terminated Lease Applications** page.

Screen

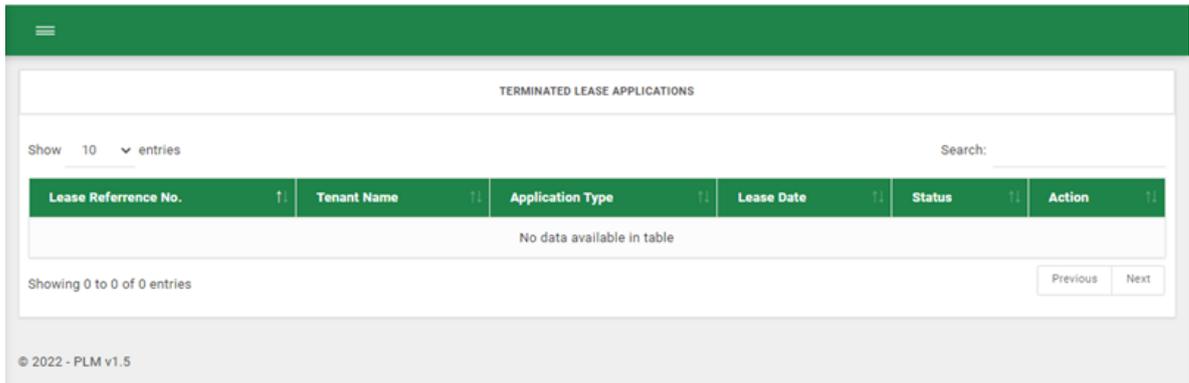
The screenshot displays the 'VACATING APPLICANT' page. It features several sections:

- EVALUATING APPLICATION:** A table with columns: Reference Number, Applicant Type, Status, Captured Date, Applicant Name, and Action. A 'View' button is highlighted in red.
- TENANT LEASE DETAILS:** A table with columns: Lease Ref No., Applicant Type, Status, Captured Date, Applicant Name, and Action. A 'View' button is highlighted in red.
- TERMINATION TO CONFIRM:** A table with columns: Termination Date, Reason For Termination, Captured Date, and Terminateion By.
- VACATING APPLICANT ACTION:** A dropdown menu for 'Tenant' with 'Vacated' selected, and a 'Submit' button, both highlighted in red.

Vacating Applicant Page



Confirmation Popup



Terminated Lease Applications Page



The termination process will end here, and the customer will be notified that their application has been approved for termination.

You have now successfully completed this sub-section

13 CONFIRM TENANT VACATED



After completing this sub-section, you will be able to confirm that the tenant vacated the unit.



Once the Letting Officer has captured an eviction committee, you are required to confirm if the tenant has vacated the unit or not.



The application status will be Application Lease Termination Approved.

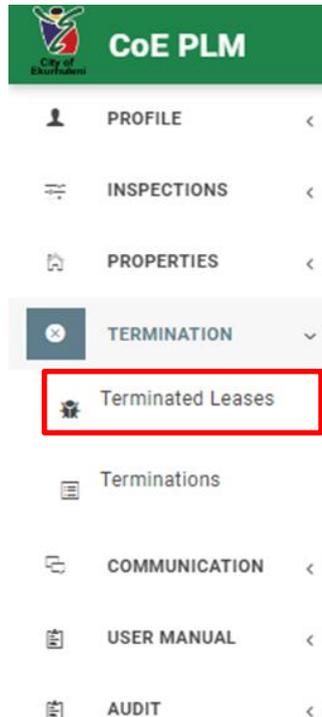
Navigate



On this screen:

- Click **Termination** dropdown arrow on the navigation panel.
- Click **Terminated Leases**
- You will be navigated to the **Terminated Lease Applications** page.

Screen



Navigation Panel

Navigate



On this screen:

- Click **Confirm Move-Out** button on the application of choice.
- You will be navigated to the relevant page.

Screen

Lease Reference No.	Tenant Name	Application Type	Lease Date	Status	Action
EHC2022072100001	Thandi Zondo	Individual Application	2022/08/11 2:26:15 PM	Application Lease Termination Approved	Confirm Move-Out

Showing 1 to 1 of 1 entries

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Tenants Application Termination Page

Navigate



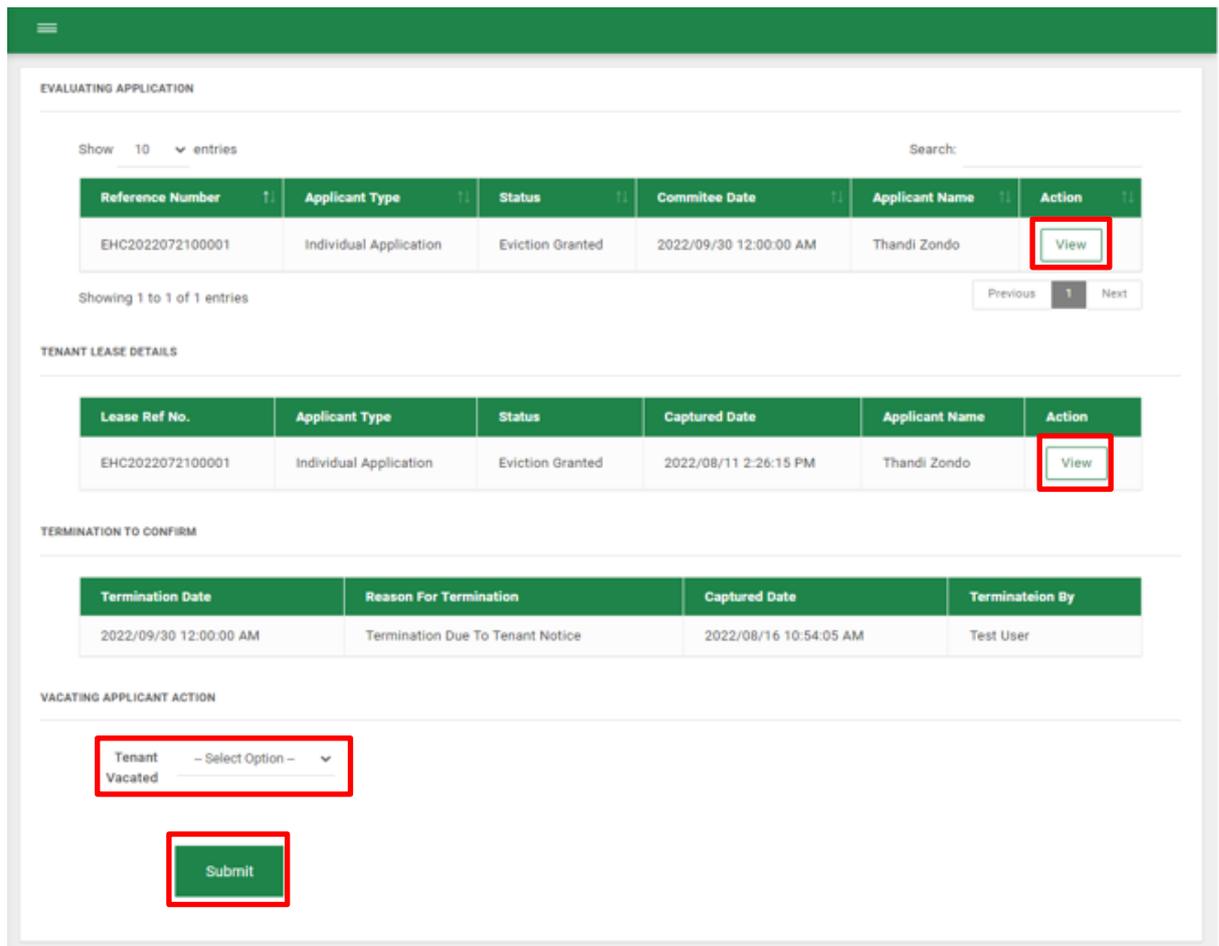
On this screen:

- Under **Evaluating Application** sub-section, clicking on the **View** button, enables you to view the following information, such as:
 - Application Details
 - Applicant Details
 - History
 - Documents
- Under **Tenant Lease Details** sub-section, clicking on the **View** button, enables you to view the following information, such as:
 - Applicant Details
 - Lease Information
 - Tenants Details
 - Applicant History
 - Occupant History
 - Documents
- You will also have an overview of the **Terminate to Confirm**, such as:
 - Termination Date
 - Reason for Termination
 - Captured Date

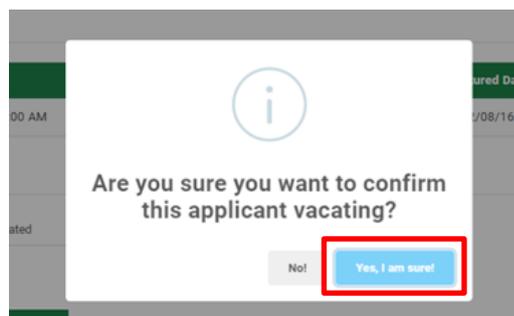
- Termination By

- Select a **Tenant Vacated** option from the dropdown list (eg. Vacated).
- Click on the **Submit** button
- 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 re-directed to the **Terminated Lease Applications** page.

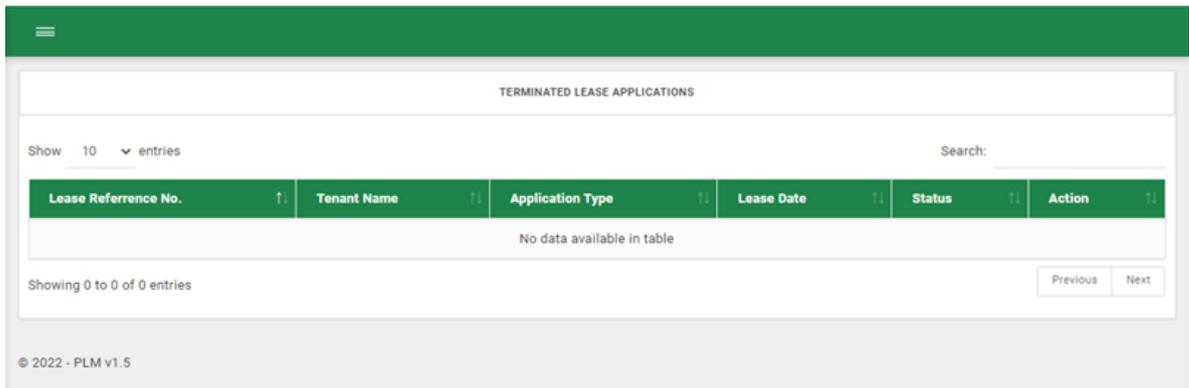
Screen



Vacating Applicant Page



Confirmation Popup



Terminated Lease Applications Page



The termination process will end here, and the customer will be notified that their application has been approved for termination.

You have now successfully completed this sub-section

14 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 allows you to find what you are looking for.
	The View button allows you to view the attached/generated document.
 USER MANUAL <	Clicking on the User Manual item on the navigation panel, gives to access to view the guidelines of how to navigate the PLM system.

15 ASSESSMENTS OF SPECIFIC LEARNING OUTCOMES

Description of Learning Outcomes		
Were you able to?	Yes Tick ✓	No Tick ✓
LOGIN TO PLM		
SCHEDULING A UNIT INSPECTION		
CONDUCTING UNIT INSPECTION		
CONDUCT UNIT VACATED INSPECTION		
CONFIRM TENANT VACATED		

16 NEXT STEPS

You will be required to complete the following:

	Training Evaluation
	Assessment



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