ERP Functional
USER MANUAL

Training Manual

Property Lease Management

Property Manager

mSCOA COMPLIANT
STANDARD CHART OF ACCOUNTS

OUR JOURNEY
TO A SMART DIGITAL CITY

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1 OVERVIEW

1.1 INTRODUCTION

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

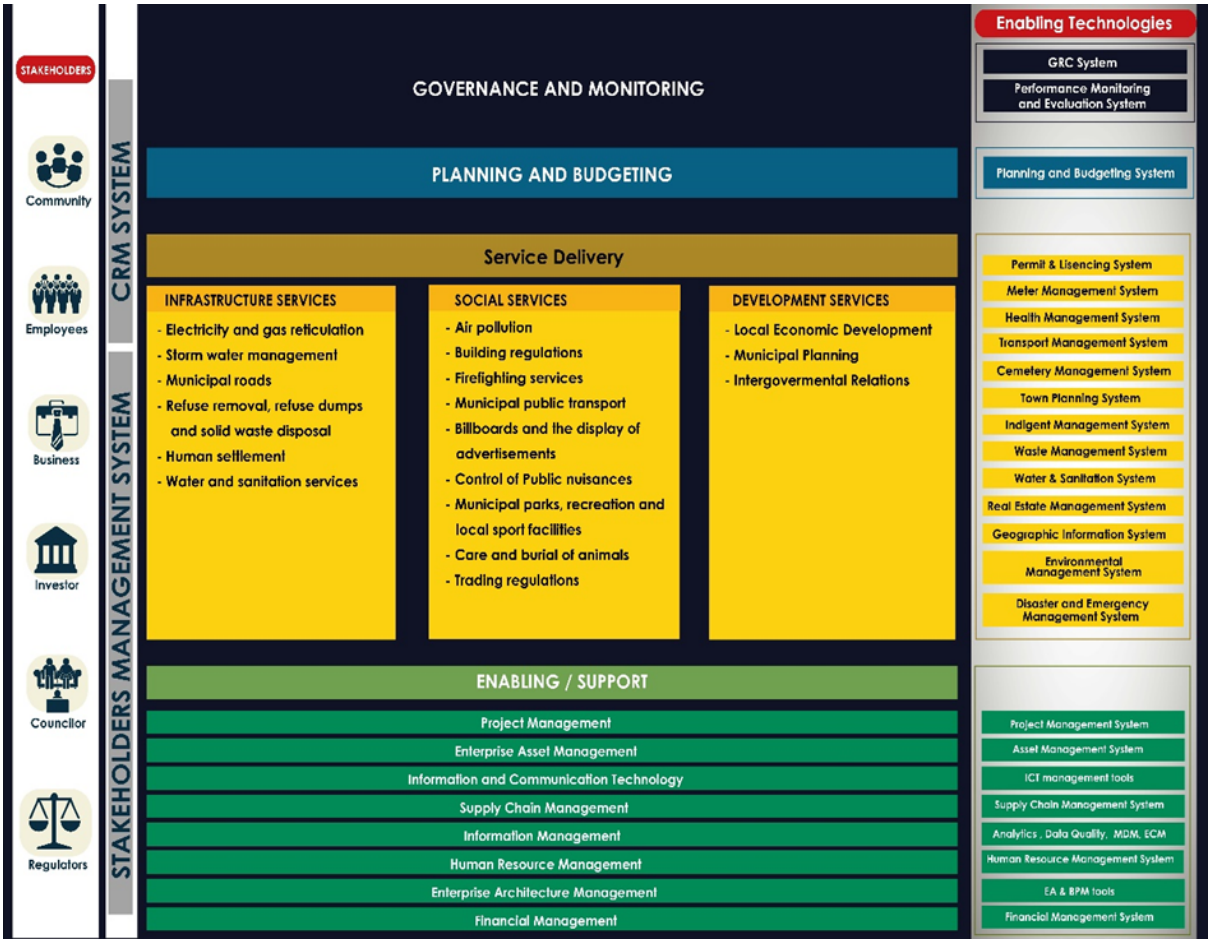


Figure 1: City Model

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

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

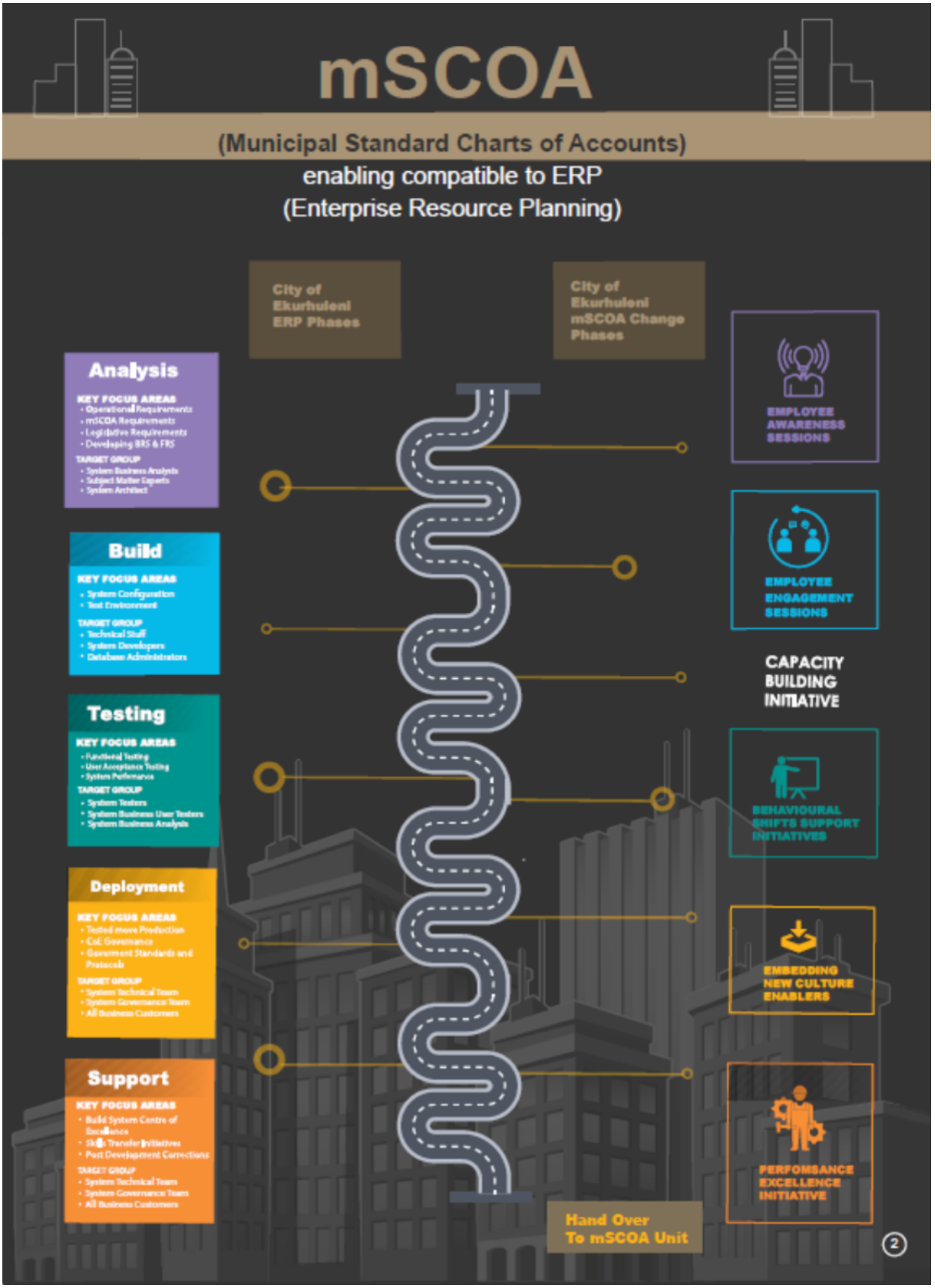
Strategy capability is responsible for all planning and budget related capability for the CoE municipality. Evaluating existing business unit strategy based on the company's strategy and eliminate unwanted/unnecessary resources/elements and re-consider necessary resources to meet the overall company's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

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

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

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

• 1.2 mSCOA ERP


mSCOA
(Municipal Standard Charts of Accounts)
enabling compatible to ERP
(Enterprise Resource Planning)
City of Ekurhuleni ERP Phases
City of Ekurhuleni mSCOA Change Phases
Analysis
KEY FOCUS AREAS
• Operational Requirements
• mSCOA Requirements
• Legislative Requirements
• Developing BRS & FRS
TARGET GROUP
• System Business Analysts
• Subject Matter Experts
• System Architect
Build
KEY FOCUS AREAS
• System Configuration
• Test Environment
TARGET GROUP
• Technical Staff
• System Developers
• Database Administrators
Testing
KEY FOCUS AREAS
• Functional Testing
• User Acceptance Testing
• System Performance
TARGET GROUP
• System Testers
• System Business User Testers
• System Business Analysts
Deployment
KEY FOCUS AREAS
• Tested move Production
• CoE Governance
• Government Standards and Protocols
TARGET GROUP
• System Technical Team
• System Governance Team
• All Business Customers
Support
KEY FOCUS AREAS
• Build System Centre of Excellence
• Skills Transfer Initiatives
• Post Development Corrections
TARGET GROUP
• System Technical Team
• System Governance Team
• All Business Customers
EMPLOYEE AWARENESS SESSIONS
EMPLOYEE ENGAGEMENT SESSIONS
CAPACITY BUILDING INITIATIVE
BEHAVIOURAL SHIFTS SUPPORT INITIATIVES
EMBEDDING NEW CULTURE ENABLERS
PERFOMSANCE EXCELLENCE INITIATIVE
Hand Over To mSCOA Unit
2

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:

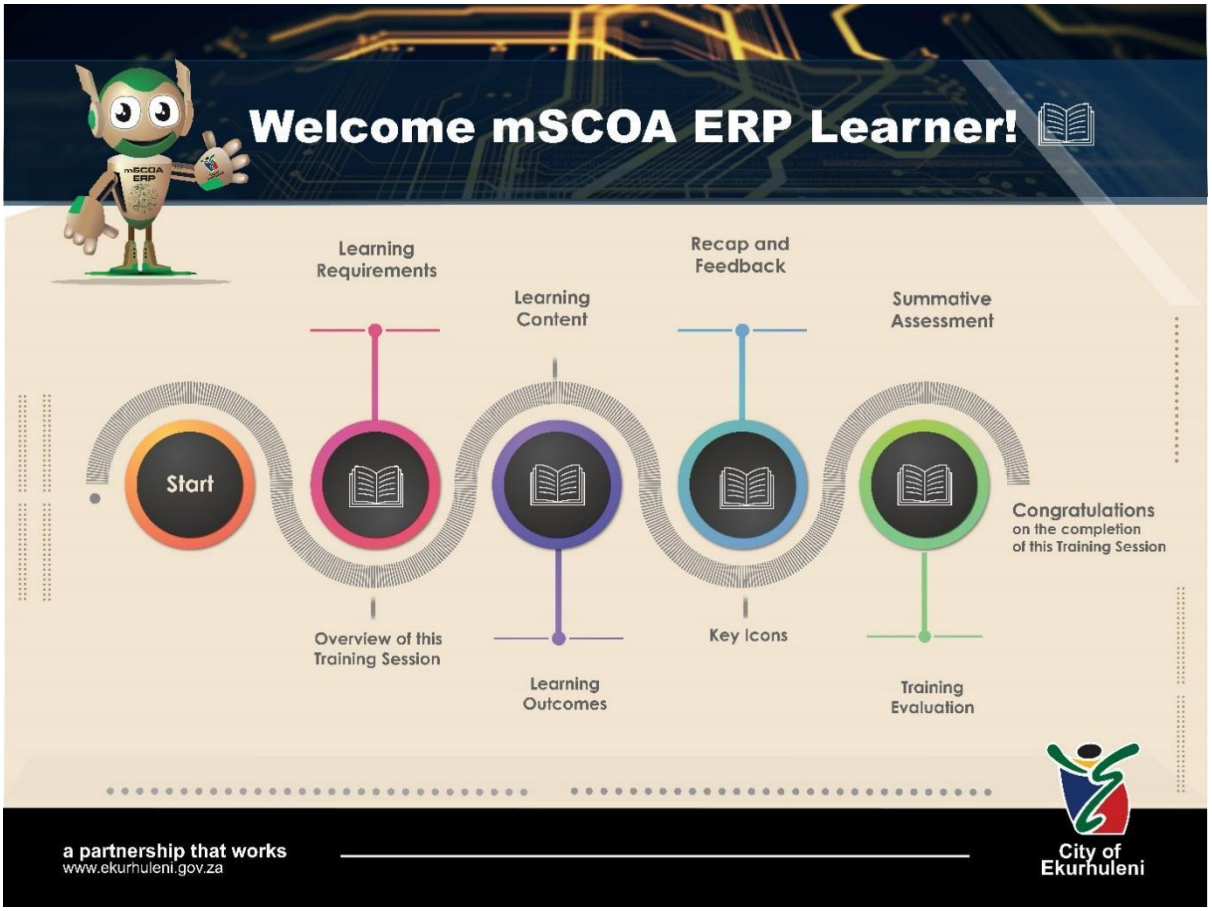
- Property Manager

4 LEARNING EXPECTATIONS

Understand System Concepts:

- System Login
- Approve Signed Lease Agreement

5 LEARNING JOURNEY



6 KEY AREAS OF LEARNING

1	LOGIN TO PLM
2	APPROVE SIGNED LEASE AGREEMENT
3	SECOND LEASE RENEWAL RECOMMENDATION

7 LEARNING OUTCOMES

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

- Navigate the Property Lease Agreement 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

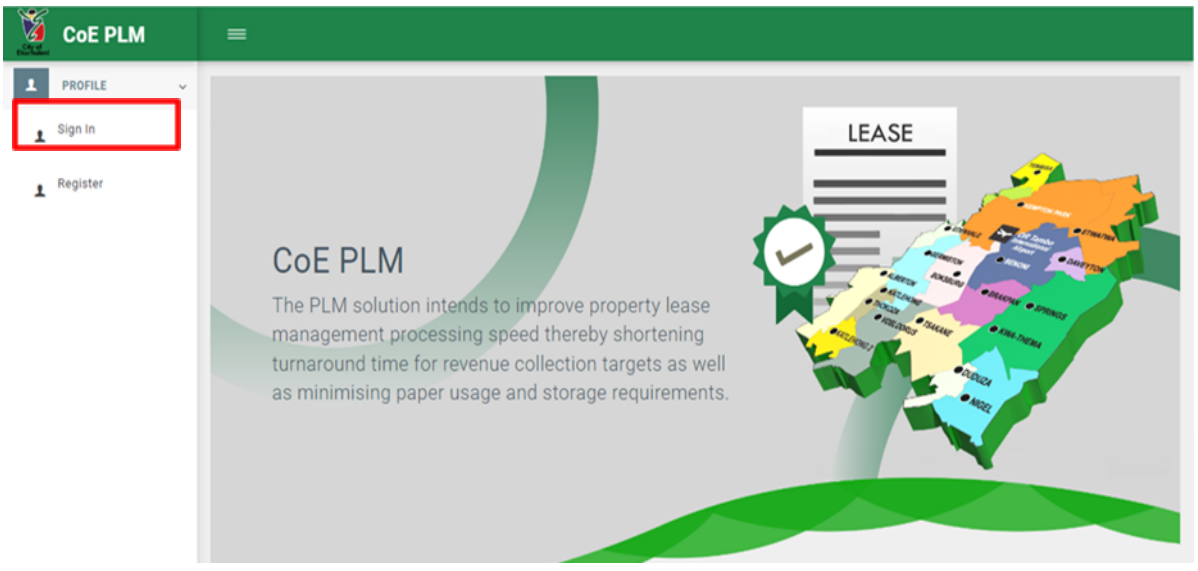
	After completing this sub-section, you will be able to successfully login to Property Lease Management as the Revenue Officer.
	The process begins when you as the Property Manager opens the Google chrome web browser and inputs the following link in the browser search pane: https://propertylease.ekurhuleni.gov.za , 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



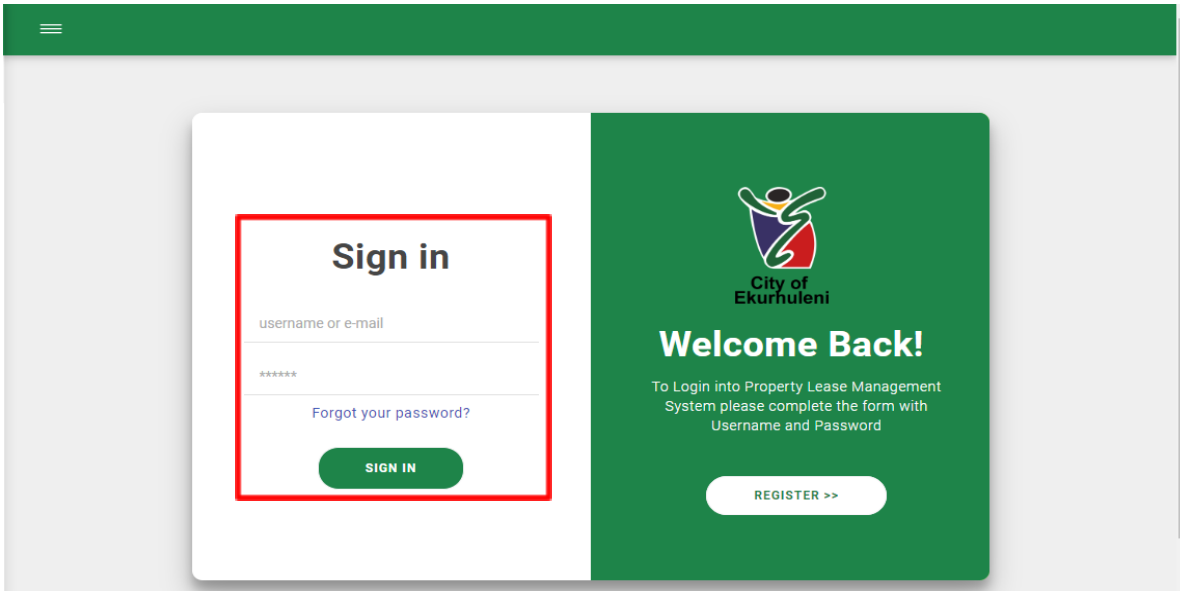
Coe PLM Landing Page - Profile

Navigate

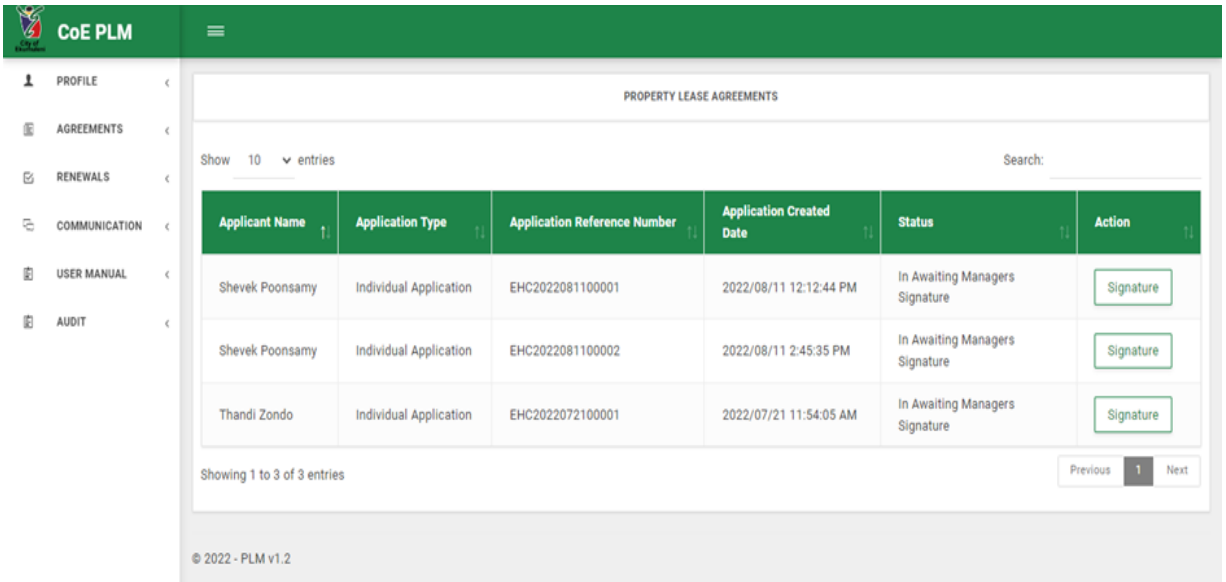
On this screen:

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

Screen



Sign In Page



Property Lease Agreements Page

You have now successfully completed this sub-section

10 APPROVE SIGNED LEASE AGREEMENT

	After completing this sub-section, you will be able to approve the signed lease agreement.
	Once the applicant has signed the lease agreement, you are required to check and validate the signed lease agreement.
	The application status will be “In Awaiting Managers Signature”.

Navigate

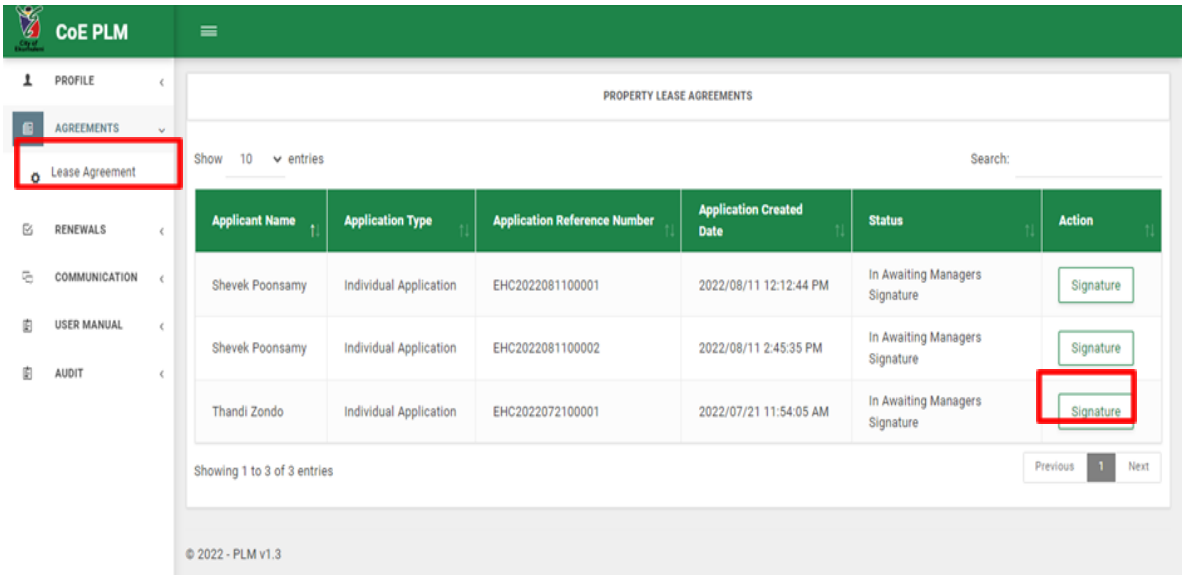
On this screen:

- Once logged in, you will be on the **Property Lease Agreements** page.

OR

- Select **Lease Agreement** under the **Agreements** item on the navigation panel.
- You will be navigated to the **Property Lease Agreements** page.
- Click the **Signature** button on the application of choice.
- You will be navigated to the **Generate Lease Agreements** page.

Screen



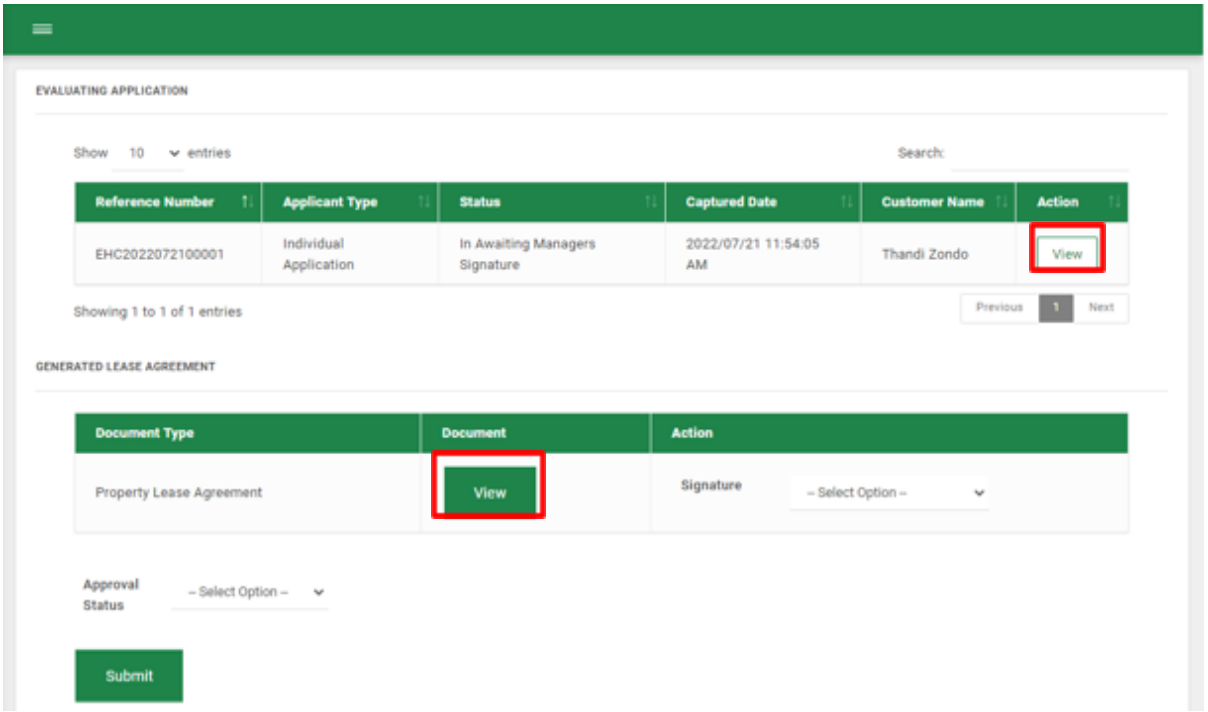
Property Lease Agreements Page

Navigate

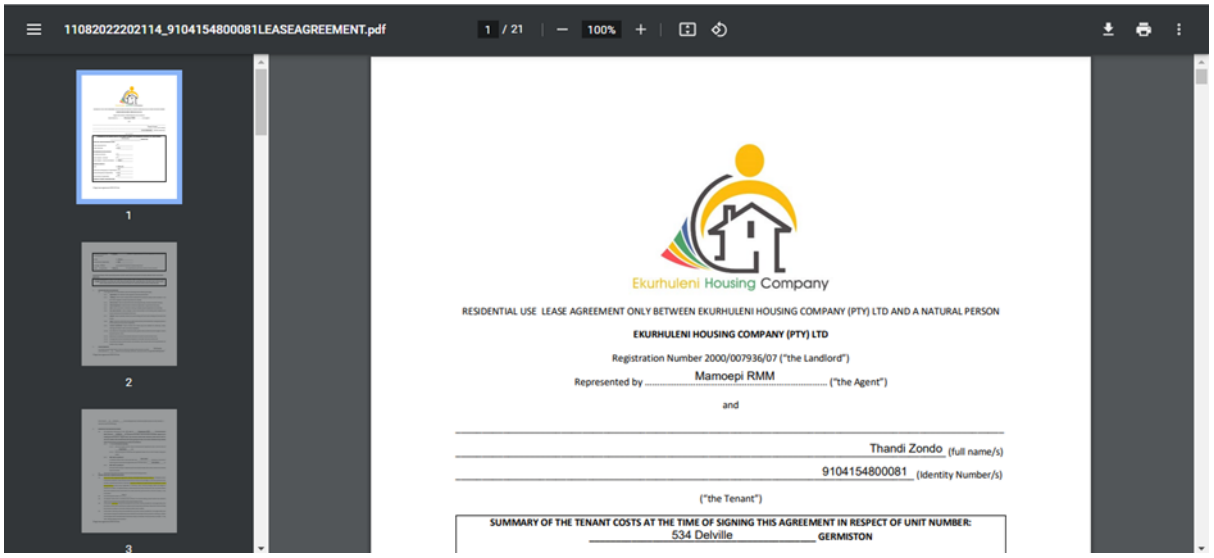
On this screen:

- Under **Evaluating Application** 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 **View** button under the **Document** column.
- The **Property Lease Agreement** will be downloaded to your computer files for your viewing.
- After viewing the Lease, select the **Approve** option next to **Signature**.
- Select **Approval Status**
- Click on the **Submit** button.
- A confirmation popup box will display, **Are you sure you want to submit this lease agreement?** Click **Yes, I am sure!** to acknowledge.
- You will be re-directed to the **Property Lease Agreement** page.

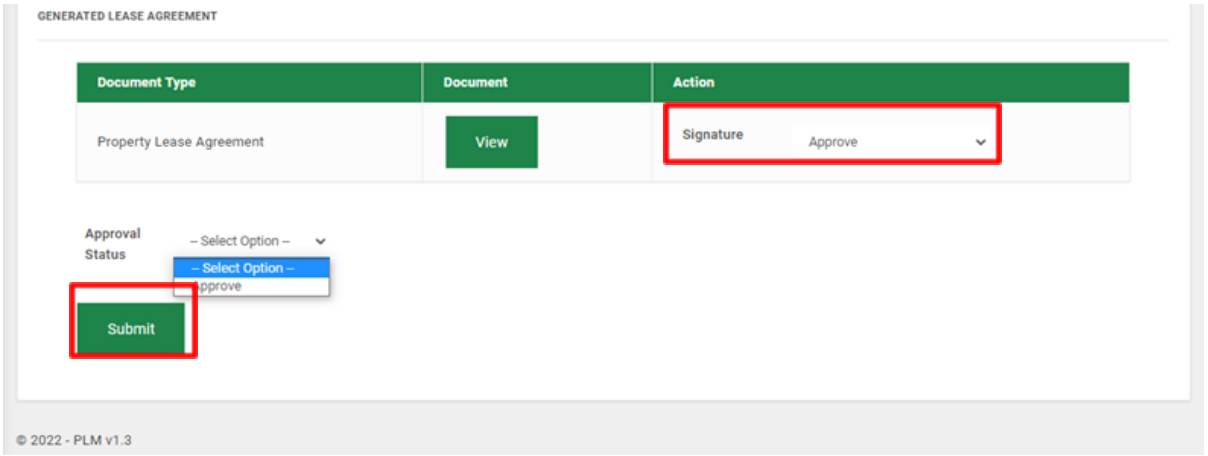
Screen



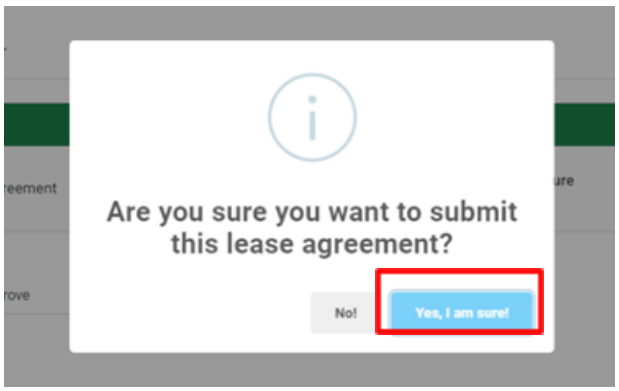
Generate Lease Agreement Page



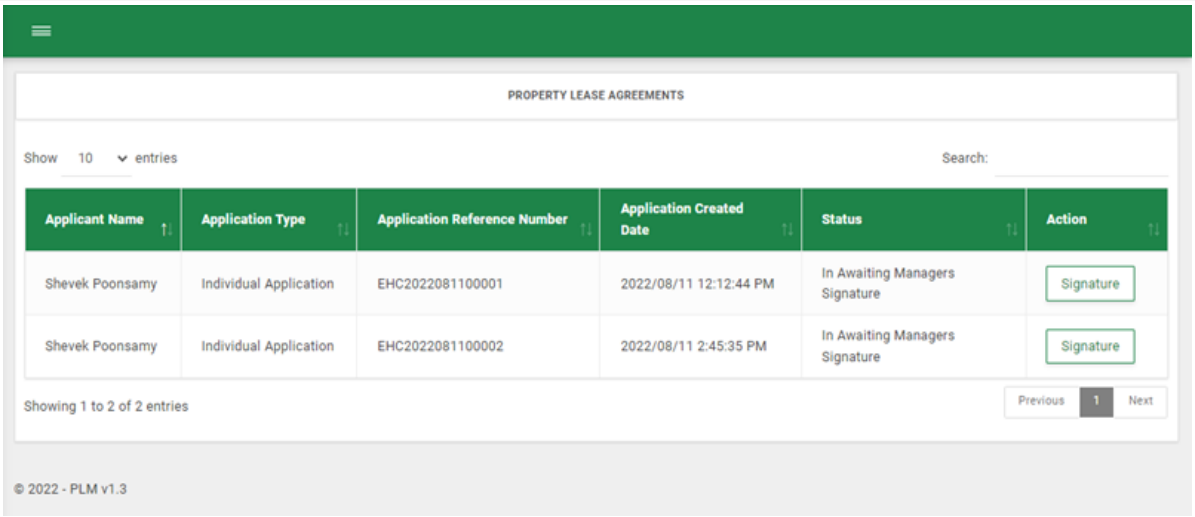
Lease Agreement



Final Approval Status



Confirmation Popup



Property Lease Agreements Page

You have now successfully completed this sub-section

11 SECOND LEASE RENEWAL RECOMMENDATION

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

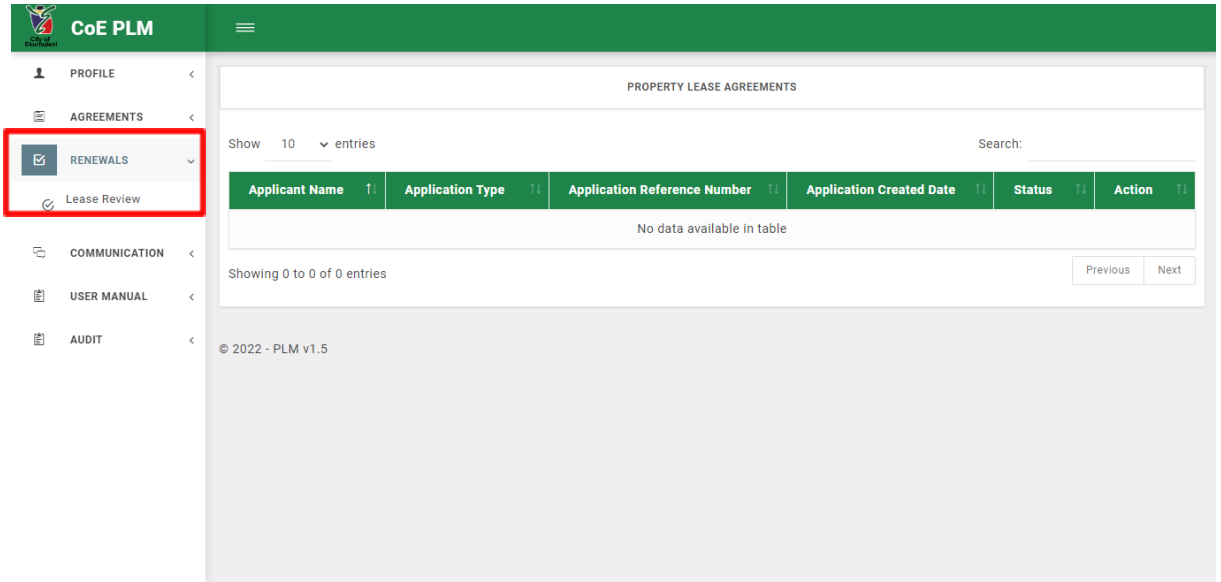
The renewal will take place when the tenant's lease is due to lapse in the next 3 months

Navigate

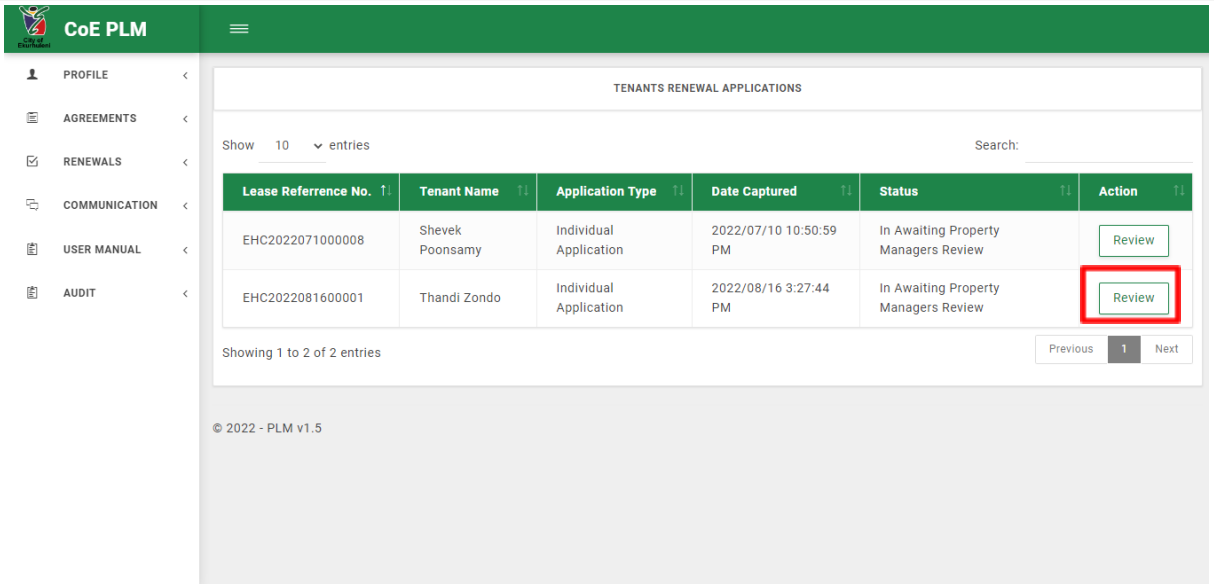
On this screen:

- Click **Renewals** dropdown arrow on the navigation panel.
- Click on the **Lease Review** item.
- You will be navigated to the **Tenants Renewal Applications** page.
- Select **Review** on the application of choice
- You will be navigated to the **Evaluating Application** page.

Screen



Property Lease Application



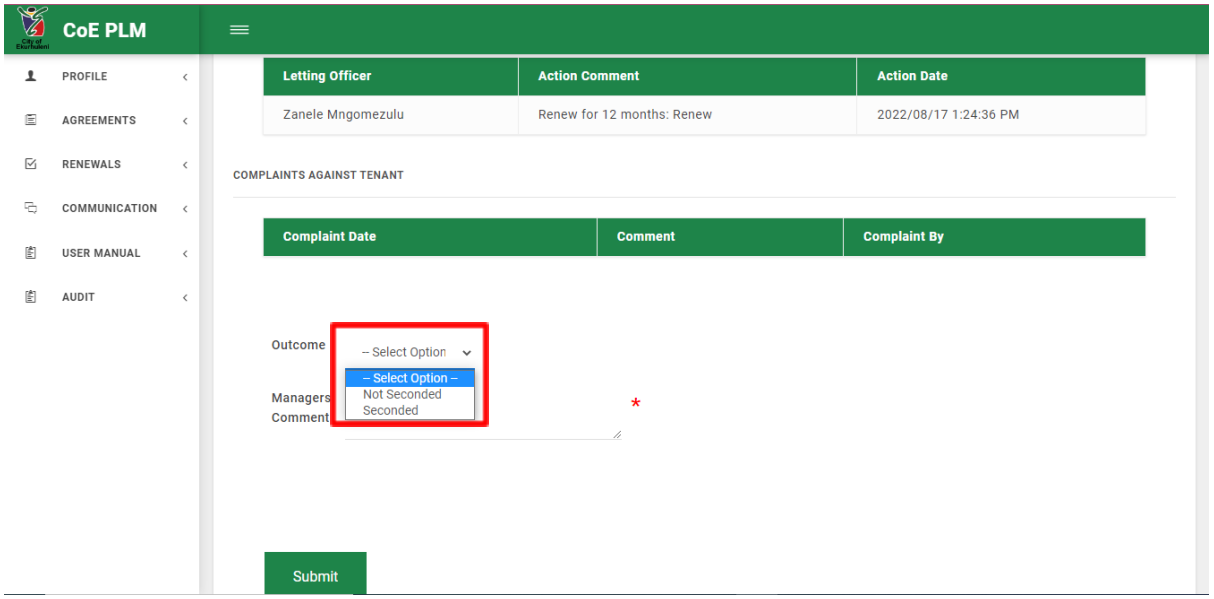
Tenants Renewal Applications

Navigate

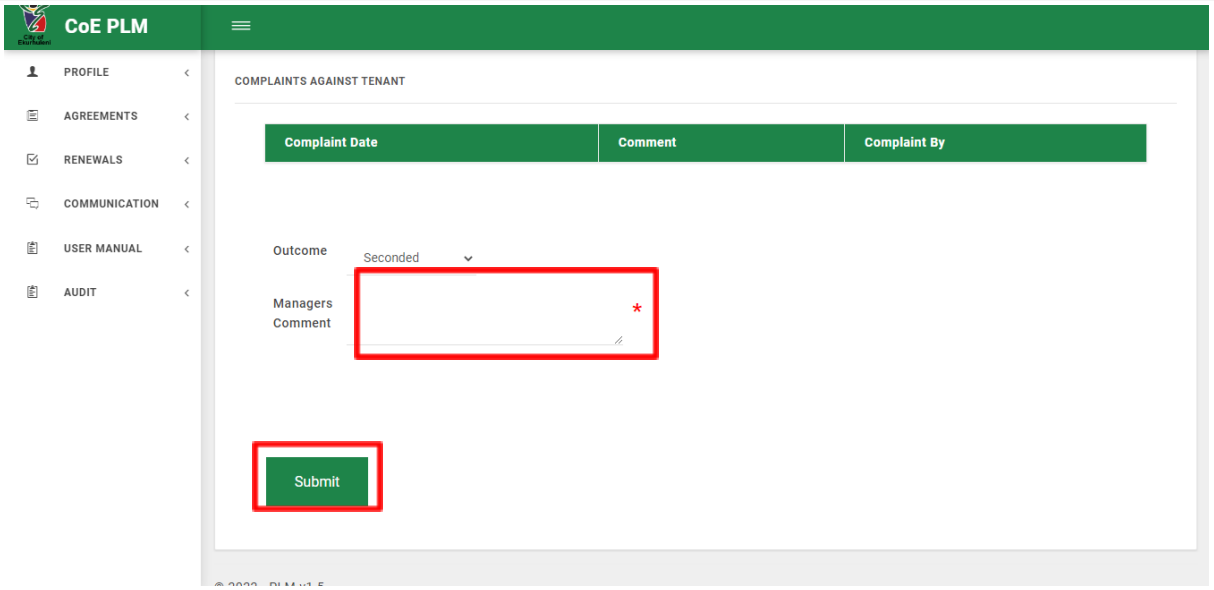
On this screen:

- Select the **Outcome** of choice
- Input a **comment**
- Click the **Submit** button
- A pop-up confirmation will be displayed
- Click **Yes, I am sure**
- You will be redirected to the **Tenants Renewal Applications** page

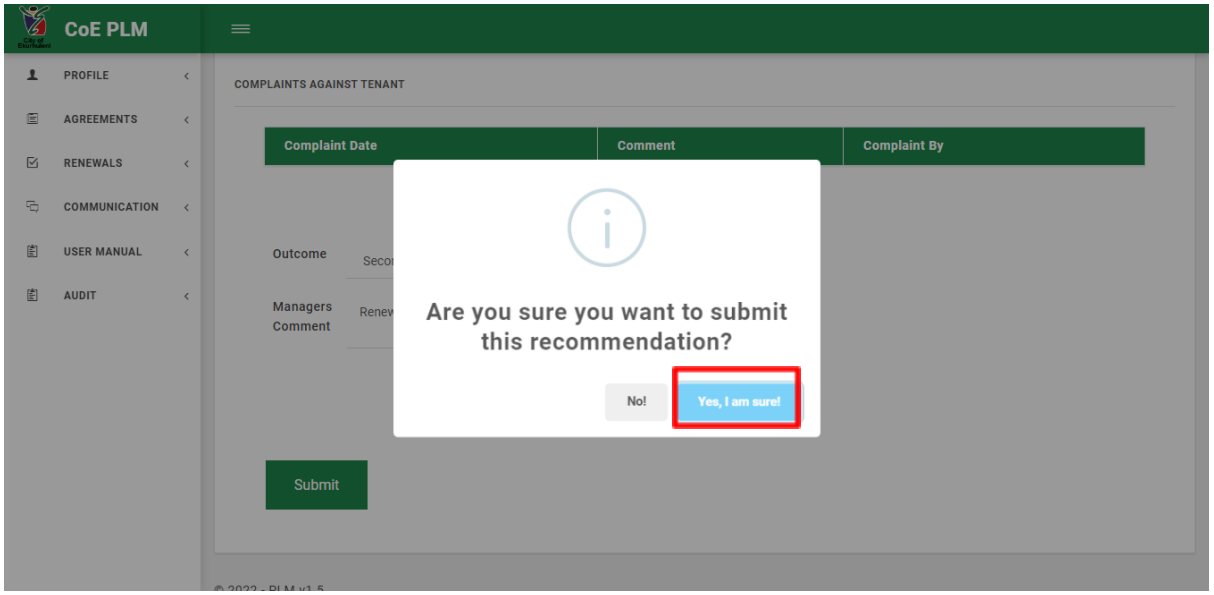
Screen



Evaluating Application



Evaluating Application



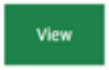
Pop-up notification

- The application will move to the Revenue Manager's work queue.

You have now successfully completed this sub-section

12 HELPFUL HINTS

- Be able to find useful guidelines throughout the application:

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

13 ASSESSMENTS OF SPECIFIC LEARNING OUTCOMES

Description of Learning Outcomes		
Were you able to?	**Yes Tick ✓**	**No Tick ✓**
LOGIN TO PLM		
APPROVE SIGNED LEASE AGREEMENT		
SECOND LEASE RENEWAL RECOMMENDATION		

14 NEXT STEPS

You will be required to complete the following:

	Training Evaluation
	Assessment

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