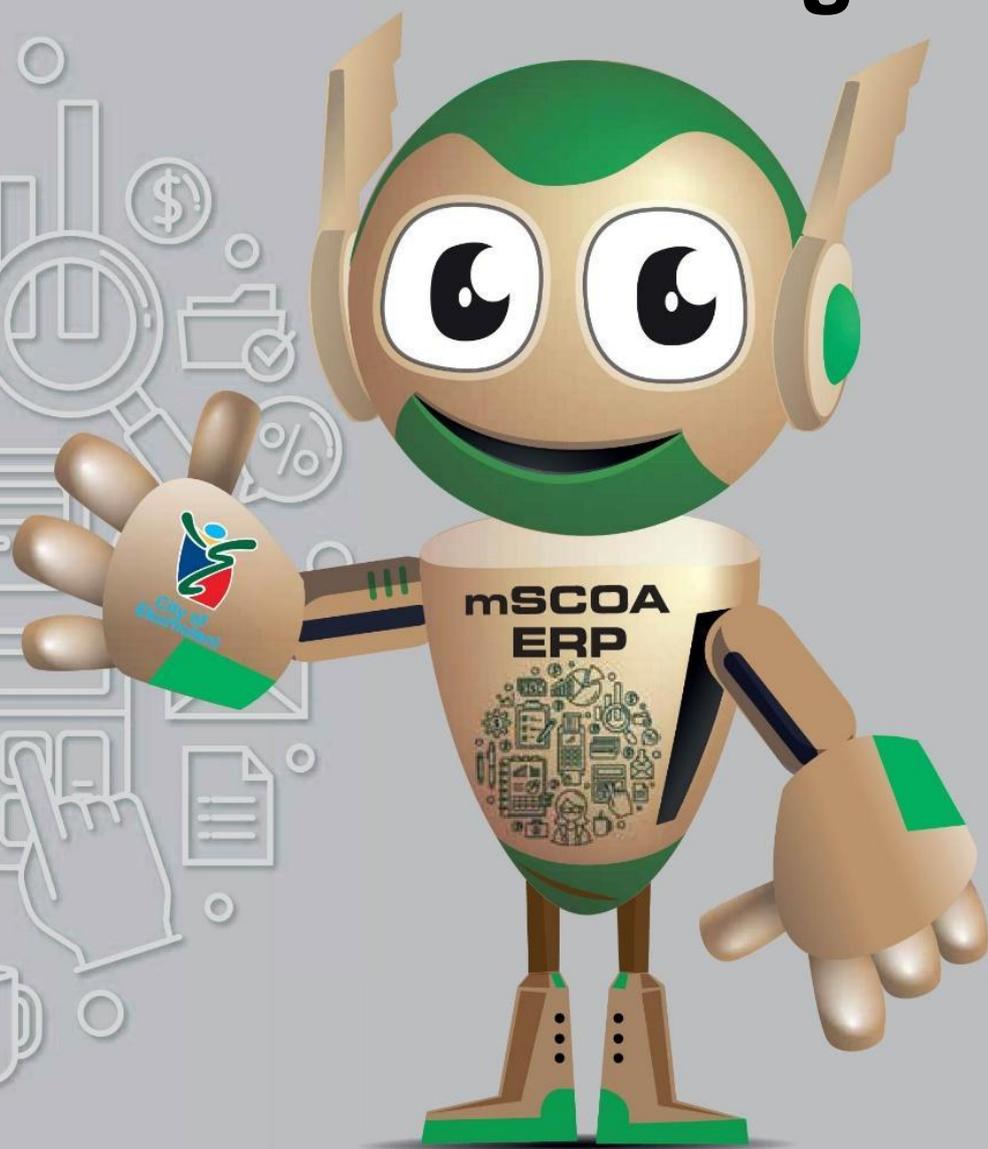


ERP Functional USER MANUAL

Training Manual

Property Lease Management Revenue Manager



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.

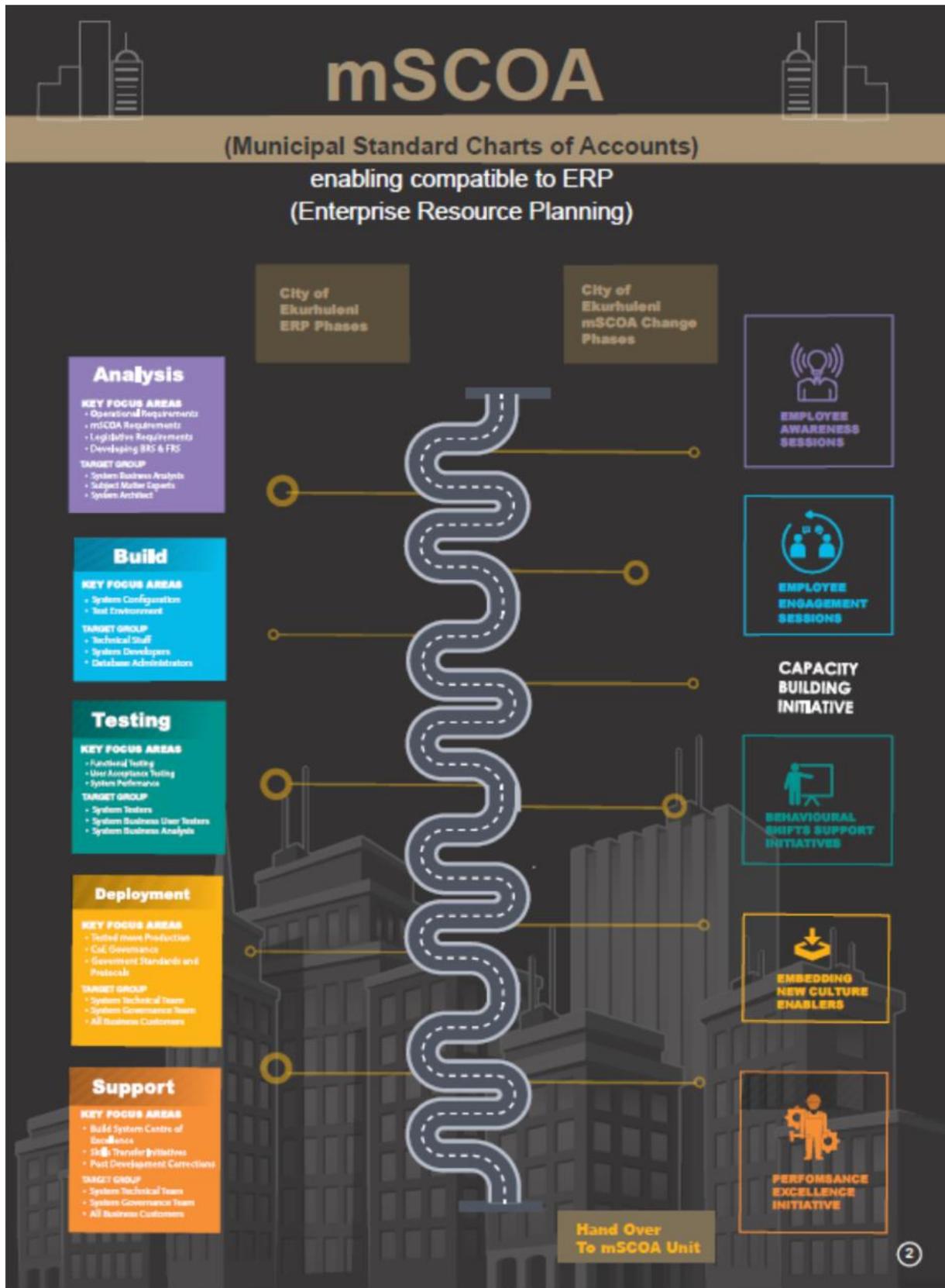
Strategy capability is responsible for all planning and budget related capability for the CoE municipality. Evaluating existing business unit strategy based on the company's strategy and eliminate unwanted/unnecessary resources/elements and re-consider necessary resources to meet the overall company's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

- Revenue Manager

4 LEARNING EXPECTATIONS

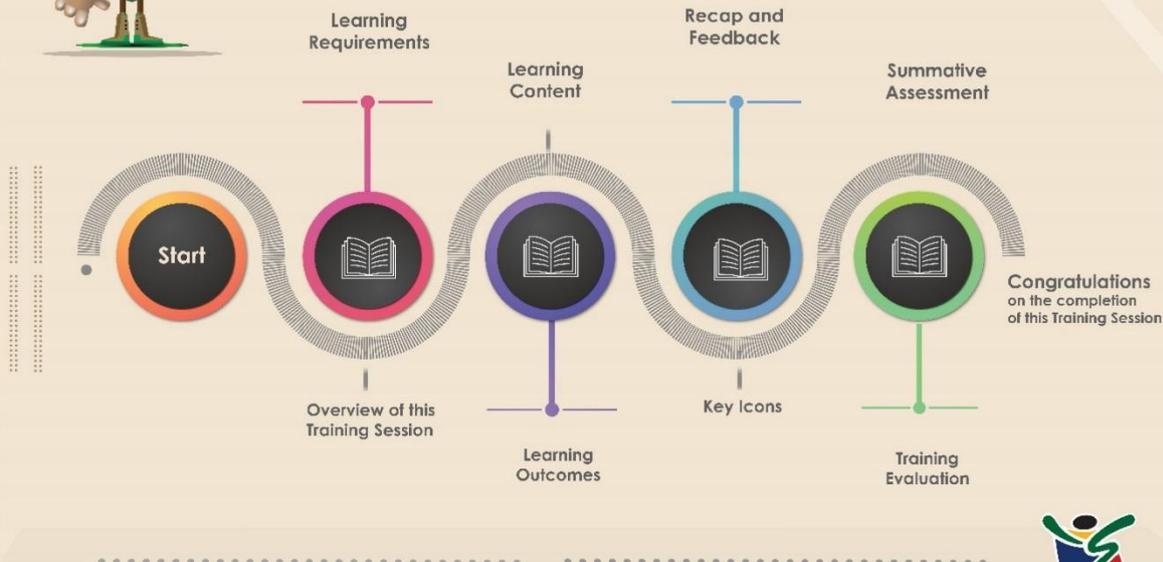
Understand System Concepts:

- System Login
- Approve Signed 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	APPROVE SIGNED LEASE AGREEMENT
3	APPROVE LEASE RENEWAL

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 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
- You will be navigated to the **Property Lease Agreements** page.

Screen

Sign in

username or e-mail

[Forgot your password?](#)

SIGN IN

City of Ekurhuleni

Welcome Back!

To Login into Property Lease Management System please complete the form with Username and Password

REGISTER >>

Sign In Page

CoE PLM

PROPERTY LEASE AGREEMENTS

Show 10 entries

Search:

Applicant Name	Application Type	Application Reference Number	Application Created Date	Status	Action
Shevek Poonsamy	Individual Application	EHC2022081100001	2022/08/11 12:12:44 PM	In Awaiting Managers Signature	Signature
Shevek Poonsamy	Individual Application	EHC2022081100002	2022/08/11 2:45:35 PM	In Awaiting Managers Signature	Signature
Thandi Zondo	Individual Application	EHC2022072100001	2022/07/21 11:54:05 AM	In Awaiting Managers Signature	Signature

Showing 1 to 3 of 3 entries

Previous 1 Next

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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 signed lease agreement is approved by the Property Manager, you are required to check and validate the signed lease agreement, as the second manager.



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

The screenshot displays the 'CoE PLM' interface. On the left, a navigation menu includes 'PROFILE', 'AGREEMENTS', 'RENEWALS', 'COMMUNICATION', 'USER MANUAL', and 'AUDIT'. The 'AGREEMENTS' menu is expanded, and 'Lease Agreement' is highlighted with a red box. The main content area is titled 'PROPERTY LEASE AGREEMENTS' and shows a table with the following data:

Applicant Name	Application Type	Application Reference Number	Application Created Date	Status	Action
Shevek Poosamy	Individual Application	EHC2022081100001	2022/08/11 12:12:44 PM	In Awaiting Managers Signature	Signature
Shevek Poosamy	Individual Application	EHC2022081100002	2022/08/11 2:45:35 PM	In Awaiting Managers Signature	Signature
Thandi Zondo	Individual Application	EHC2022072100001	2022/07/21 11:54:05 AM	In Awaiting Managers Signature	Signature

At the bottom of the table, it says 'Showing 1 to 3 of 3 entries'. The 'Signature' button for the Thandi Zondo application is highlighted with a red box.

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**.

Screen

EVALUATING APPLICATION

Show 10 entries Search:

Reference Number	Applicant Type	Status	Captured Date	Customer Name	Action
EHC2022072100001	Individual Application	In Awaiting Managers Signature	2022/07/21 11:54:05 AM	Thandi Zondo	View

Showing 1 to 1 of 1 entries Previous 1 Next

GENERATED LEASE AGREEMENT

Document Type	Document	Action
Property Lease Agreement	View	Signature <input type="text" value="- Select Option -"/>

Generate Lease Agreement Page

12082022102453_9104154800081LEASEAGREEMENT.pdf 1 / 21 100%

Ekurhuleni Housing Company

RESIDENTIAL USE LEASE AGREEMENT ONLY BETWEEN EKURHULENI HOUSING COMPANY (PTY) LTD AND A NATURAL PERSON

EKURHULENI HOUSING COMPANY (PTY) LTD

Registration Number 2000/007936/07 ("the Landlord")

Represented by Mamoepli RMM ("the Agent")

and

Thandi Zondo (full name/s)

9104154800081 (Identity Number/s)

("the Tenant")

Lease Agreement

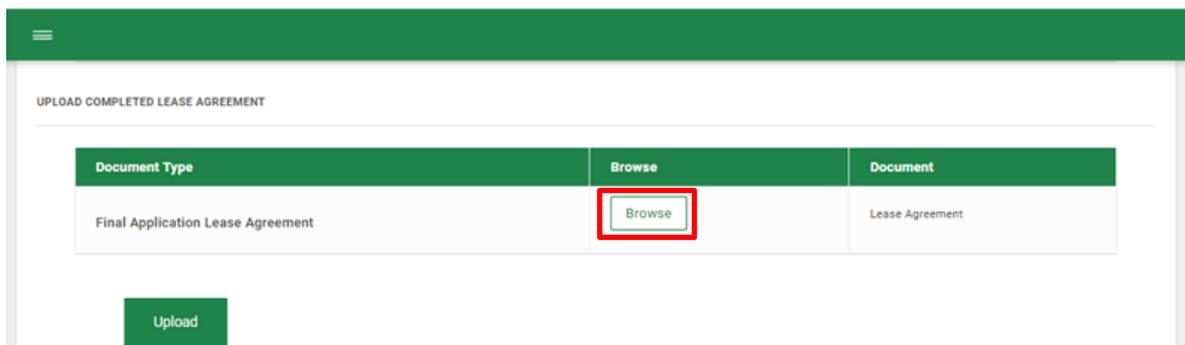
Navigate



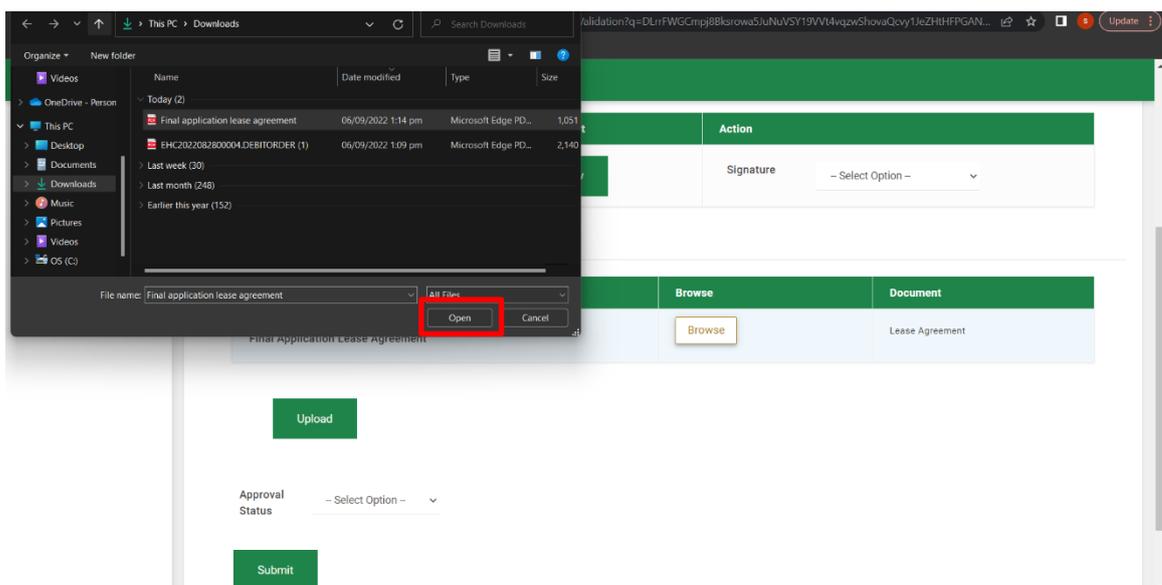
On this screen:

- Click on the **Browse** button, to upload the **Completed Lease Agreement**.
- 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 Lease Agreement



Selecting Document from Computer Files

UPLOAD COMPLETED LEASE AGREEMENT

Document Type	Browse	Document
Final Application Lease Agreement	<input type="button" value="Browse"/>	Final lease agreement.pdf Lease Agreement

Document Attached

CoE PLM

Progress

PROFILE

AGREEMENTS Document(s) Uploaded

RENEWALS

COMMUNICATION <

Final Application Lease Agreement Lease Agreement

Progress Popup – Documents Uploaded

UPLOAD COMPLETED LEASE AGREEMENT

Document Type	Browse	Document
Final Application Lease Agreement	<input type="button" value="Browse"/>	Final lease agreement.pdf x Lease Agreement

Uploaded Completed Lease Agreement

Navigate



On this screen:

- 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

Approval Status

- Select Option -

- Select Option -

Approve

Submit

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Final Approval Status

Browse

Are you sure you want to submit this lease agreement?

No! Yes, I am sure!

Confirmation Popup

PROPERTY LEASE AGREEMENTS

Show 10 entries Search:

Applicant Name	Application Type	Application Reference Number	Application Created Date	Status	Action
Shevek Poonsamy	Individual Application	EHC2022081100001	2022/08/11 12:12:44 PM	In Awaiting Managers Signature	Signature
Shevek Poonsamy	Individual Application	EHC2022081100002	2022/08/11 2:45:35 PM	In Awaiting Managers Signature	Signature

Showing 1 to 2 of 2 entries

Previous 1 Next

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Property Lease Agreements Page



The customer will receive a notification that the application is awaiting debit order authority.

The application will move to the customer's queue.

You have now successfully completed this sub-section

11 APPROVE LEASE RENEWAL



After completing this sub-section, you will be able to review and approve 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

CoE PLM

PROPERTY LEASE AGREEMENTS

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 v1.5

Property Lease Applications

CoE PLM

TENANTS RENEWAL APPLICATIONS

Show 10 entries Search:

Lease Reference No.	Tenant Name	Application Type	Date Captured	Status	Action
EHC2022081600001	Thandi Zondo	Individual Application	2022/08/16 3:27:44 PM	In Awaiting Revenue Managers Review	Review

Showing 1 to 1 of 1 entries

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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

CoE PLM

PROPERTY MANAGERS ACTION

Managers Comment	Action Comment	Action Date
Renew	Recommendation Secondend By Property Manager	2022/08/17 2:04:32 PM

Outcome: -- Select Option --

Managers Comment:

Submit

Evaluating Application

CoE PLM

PROPERTY MANAGERS ACTION

Managers Comment	Action Comment	Action Date
Renew	Recomendation Secondded By Property Manager	2022/08/17 2:04:32 PM

Outcome: Approve

Managers Comment:

Submit

Evaluating Application

CoE PLM

PROPERTY MANAGERS ACTION

Managers Comment	Action Comment	Action Date
Renew		2022/08/17 2:04:32 PM

Outcome: Approve

Managers Comment:

Submit

Are you sure you want to submit this application for renewal?

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

Pop-up notification

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.
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.

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		
APPROVE LEASE RENEWAL		

14 NEXT STEPS

You will be required to complete the following:

	Training Evaluation
	Assessment



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