

# <u>Login</u>

Once the system has been installed on your computer you will find an MD Assets icon on your desktop, double click on this icon to gain access to the system.



Once the icon has been clicked the following window will appear on your screen:

	Username: Password: Server: Local Server
Asset Mana	Login Exit Remember Username Forcat Password?
v 7.56	o <b>s</b>

To gain access to the system, a unique username and password needs to be assigned to you by the administrator. Unique user accounts allow the administrator to award privileges to certain users as well as record changes made to the system by each user.

**User name field** – here you will need to type in your username that your administrator has Supplied you.

**Password field** – here you will need to type in your password. Once you have inserted your details, click on the **Login** button.



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#### Asset Management System User Manual

If you login successfully the following screen will appear, click go button to proceed.



If you receive a "Server Error" message, check your internet connection and try again.

### Login failure

In the event that the incorrect login details are entered, the system will warn you and the following window will appear.

If you forget your password, click on the forget password link in blue and the system will send the password through email.



### Forgot password

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The system will request your email address, type in your email address and click send button to submit. If the system recognizes your email address you will receive your password immediately, however if an incorrect email address is typed in, your password reset will not be successful.

🗘 Send password to Email				×
	Forgot Password			
- Send Password				
Email		Send	Cancel	

Once your password has been changed, you will be able to log in successfully.





### Landing page

After login successfully, the system will take you directly to the landing page.

C> Starting Page	je - MD Assets - Denio Municip	olty   Active Period: 381905	(2018-11-01 - 2018-11	-30)   Vew Period: 181	905 (2018-11-01 - 2018	I-11-30)		- 0 ×
👔 Hone 🚺 20 🙀 Project 🚺 Asset Reguter	🍇 Maintananca 🛛 🔌	jinurance 🛛 🔊 Meter	n 🛐 Functions	Verification	🖉 Attachments	📋 Reports & Exports		External So
Landing My Profile Dashbaard Verification								
TEST Demo Municipality CLIENT Server Address : 129,232,155,98 systemo2							/ Munya y dete : No expiry d s : Active	No income state
		ME	Asse	t MANAGE	R			
🗼 Main Debug 🚥 Period 🔅 Settings 🧳 Changelog 🚓 Lookups								

## User profile

#### How to access user profile

The user should click on my profile button, then click on user Profile button on the system and the following window will appear. This is where the user can update his/her user profile and change password.

Q.	Starting Page - MD Assets - Demo Municipality   Active
Home IDP	🙀 Project 🚺 Asset Register 🚴 Maintenance 💐 Insurance
Landing My Profile Dashbov Verification	
😯 User Profile	×
UI	PDATE USER PROFILE
Existing User	
Name	Cindy
SurName	Munyai
Email	c.munyai@m-demand.co.za
Tel No	0129913122
Location	MD Office
Profile Picture	NO IMAGE AVAILABLE Change
User Name	Cindy
Password	Change Password
	Update Cancel

The user has access to update the profile and upload a profile picture.

The password option will be greyed out, but once you click on change password the system will give you access to type your new password.

### Invalid user profile

The following message will appear if the user does not key in the characters required by the system. Click ok and enter the correct password required or correct information.





🕻 User Profile		$\times$
U	PDATE USER PROFILE	
Existing User		
Name	ΥΥΥ	
SurName	Π	
Email	RRR	
Tel No	Update user profile X	
Location	Invalid Email	
Profile Picture	OK	
	NO IMAGE AVAILABLE Change	
User Name	Cindy	
Password	****** Change Password	
	Update Cancel	

The following message will pop up if the user's profile has been updated. Click ok to continue.

User Profile	×
Profile updated	
ОК	]

### **Dashboard verification**

#### How to access Dashboard verification

The user should click on dash board verification in the system, Wait for the system to load the dashboard data, the system might take a moment to depending on the user's internet speed connection. Click yes to continue.

Assets de								- a ×
🚹 Home 🚺 IDP 🙀 Project 🚺 Asset Registe	r 🚑 Maintenance 🎽	Insurance 🛛 💦 Meters	Functions	Verification	Attachments	📋 Reports & Exports	🕷 mscoa	📀 External Go
Landing My Profile Dashboard Verification								
D 123 (Dashboards contains rounded values)								
	Warning				x			
	Click Yes' to load the	rces referenced in this file may ha data source content as is. trusted data source content.	arm your computer. Was	s this file obtained fro	m a trusted source?			
		Yes	No					
		È						
		We are busy fetching There is a lot of asset depending on your co this can take a momen	innection speed					

The main dashboard shows counts and the total number of assets tracked. This is the main window where the user will be able to navigate to the rest of the system. The user can see the total number of all assets, e.g. verified assets, new found assets and assets by category (count)

See below picture(s).

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Home 🚺 IDP	🙀 Project	S Asset Register	Aaintenance	🦄 Insurance	🔊 Meters	Functions	Verification	Attachments	📋 Reports & Exports	🎇 mSCOA	وي ا	ixternal G
anding My Profile Dashb	ooard											
Verific	ation											
🖉 🕤 💷 (Dashboa	rds contains rounded value	es)										
verview T												
erification Progress	Counts / Sums / Sta											
Verified	Assets	Ve	rified	Carry Val		NewFounds						
All Assets Not Verified		71 •	22.54%	16 15 )	R157K		782					
60	Daily Verification Pro	rogress										
											5	
40	5 4											
20	Ŭ [	2								2	2	
₀≟₊╡╡	Assets (Count)										11	
Total	< 0						10					
ssets By RUL Brackets		Assets By Cor	nditions				Asset Gro	ups		ets By Category		
	0	Very Good Tel O Fai		- 12			V 0		Cate	gory	Assets 6	
		D Nes	v - 5				False		Build	inas	5	
0-1		8 Fai			- 22		1 True			puter equipment	5	
10-20			0 5	10 15	20	25 30			Fire	equipment	5	-R9
20+	5-10			Assets	(Count)				Furn	iture and office	5	-R2.6
											2	

# <u>IDP</u>

## How to create the integrated development plan (IDP)

The user should click on IDP function and the following window will appear Here the user can view and manipulate the IDP.

¢				Starting Page - MD A	ssets - Demo Munici	pality   Active Pe	riod: 181905 (20)	18-11-01 - 2018-11-3	0)   Wew Period: 1819	05 (2018-11-01 - 2018	-11-30)	
f Home	A DP	Project	S Asset	Register 🙈 )	taintenance 🧯	Insurance	Meters	nuctions 🛛	Verification	Attachments	📋 Reports & Export	s 🎇 mSCOA
IDP Prot				D- IDP								0 X
Bud	iject Budge dget Report			M, IDA								
TEST		no Muni teress : 129.232.191	5.98		dd New 👷 Re	iew and manipulat	e your IDP.				Export XLSX iss	Create Template
			-	ProjectName	Description	ProjectNumber	ScoaProjec	t ScoaRegion	ScoaFunction	Status	Commitment	DateCreated
				000	CCCC	111	ocourrojec	. Direction		0000	vv	2017-10-25
				Upgrading street Klof	Upgrading	333				ourrent	mmm	2019-02-27
				Water treatment	Upgrading	345				reneval	cvb	2019-02-28
				Water distribution PTA	Water distribution PTA	1				planning	new	2019-04-02
				Count: 4							*	Import Template

Click – add new button to start creating a new project. All the required fileds should be completed with relevant information.

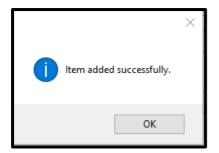
Ś	IDP									- 🗆 ×
		IDF	>							0
		Welce Here	🖓 New IDP	record		-	×			
			aja	Add New I	DP Item		0		_	
L	¢ 📑 A	dd New							Export XLSX	Create Template
Dr		iere to gro		Project Name						
	ProjectName	Descript				^		Status	Commitment	DateCreated
+	ccc	CCCC						eee	vv	2017-10-25
	Upgrading street Klof	Upgradir		Project Number				current	mmm	2019-02-27
	Water treatment	Upgradir						reneval	cvb	2019-02-28
	Water distribution PTA	Water d PTA		Description		A		planning	new	2019-04-02
				Status						
						^				
				Commitment						
						^				
	Count: 4									
	Selected : 0									🛃 Import Template
		_		$\checkmark$	Save					
-		_								
-	and the second se									

After the user has added the new IDP item, he can click save button to save the added information, the confirmation window will appear, click yes to save new IDP item.

New IDP record -	×
Add New IDP Item	0
Project Name	
Project Number	
You are about to add a new IDP item, are you sure?	
Yes INO	
Commitment	
Save	

The system will ask if the user wants to add new IDP item.

Click save to confirm and the system will confirm if the item has been aded successfully. Click ok to continue.



### Viewing and manipulation of IDP.

The new added item will be added at the bottom of all the projects that has been added on IDP in order to be viewed and can be exported in excell spread sheet as well.

	Add New 👷 Ren						Export XLSX	Create Template
ProjectName	Description	ProjectNumber	ScoaProject	ScoaRegion	ScoaFunction	Status	Commitment	DateCreated
ccc	cccc	111				eee	vv	2017-10-25
Upgrading street Klof	Upgrading	333				current	mmm	2019-02-27
Water treatment	Upgrading	345				reneval	cvb	2019-02-28
Water distribution PTA	Water distribution PTA	1				planning	new	2019-04-02
уууу	rrrrrrrr	III4				5555555555	bbbbbb	2019-04-10



## mSCOA segments

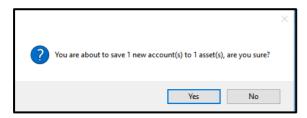
All added projecs should be mSCOA configured, select, then right click on the added project and 3 mSCOA segments will appear, **region**, **Function** and **project**.

0		IDP Welcome to you Here you can vie	r IDP ew and manipulate y	our IDP.					×
4	3 🤤 A	dd New 🎅 Rem	love					Export XLSX	2 Create Template
Dra									
	ProjectName	Description	ProjectNumber	ScoaProject	ScoaRegion	ScoaFunction	Status	Commitment	DateCreated
	ccc	cccc	111				eee	vv	2017-10-25
	Upgrading street Klof	Upgrading	333				current	mmm	2019-02-27
	Water treatment	Upgrading	345				reneval	cvb	2019-02-28
×	Water distribution PTA	Water distribution	· · · · · · · · · · · · · · · · · · ·				planning	new	2019-04-02
	уууу						\$\$\$\$\$\$\$\$\$\$	bbbbbb	2019-04-10
		ScoaFication - R ScoaFication - F ScoaFication - P Create Project B	unction Project						
	Count: 5								
1	Selected : 1								生 Import Template

Click on on the first segment which is **Scoafication – Region.** Select the relevant accounts from available accounts by dragging and dropping them in the correct slots.

mSCOA Config							×
See mscOA Config							^
	SCOA conf	fig 6.	.2				0
Pleas	ome to the mSCOA co se select all the relevant able accounts (right) b . Once all have been s	nt accoun	its (le 10 ar	d dropping them in the correct			
				ave to save changes.			
- 1	Current Segme	nt: Regi	on				
0	Selected asset	(s): 1					
		Short D	0.000	intion			
Region		A Rei					
Whole of the Province: Gaute	ng			# ional Identifier			
		1		National Functions			
				Provincial Functions			
				Whole of the Province: Eastern Cape			
				Whole of the Province: Free State			
	,			Whole of the Province: Gauteng			
				Whole of the Province: KwazuluNatal			
				Whole of the Province: Limpopo			
				Whole of the Province: Mpumalanga			
				Whole of the Province: North West			
				Whole of the Province: Northern Cape			
				Whole of the Province: Western Cape			
			×	Local Government by Province			
	<						>
		_			-	-	
Save(IDP)	6						
Save(IDP)							

Once all accounts has been selected, click save (IDP) to save changes made. Confirmation window will appear, click yes to continue.



The system will confirm if the changes made has been successful. Click ok to continue.

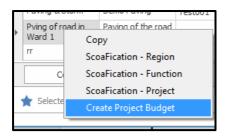






### Creating project budget directly from IDP

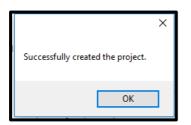
The user has access to create project budget directly from IDP. First select the project you want to create budget for, Right click and select the last segment (create project budget).



After clicking create project budget, the following window will appear and the user can start adding a new project budget.

Create Project Budget		×
	Project Budget Welcome to create Project Budget Here you can add a new project budget	
Asset Class	Other assets	*
Budget Period: Asset Class	-	
Vote Number	pppp 555	
Project Name	Water treatment           Renewal of existing asset         Image: New Asset	]
Start Date Projected completion date	2020-02-12 2022-02-16 12:00:00 AM	▼ ▼
	Save	

After filling the required information click save and the system will confirm if the project created is added successfully. Click ok to proceed.



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## Project Budget

#### How to view project budget view

The user should click on budget project and the project budget view window will appear.

Pro	oject Bu	Idget									_		×
			Project Bu	udget Vie	ew								0
			Welcome to Project B	udget View.									
		9	Use this to tree view Double click to drill do	to add project buo wn.	lgets.								
			Actual Current y	ear: 1819	(	Current Year:	1819	*	Refresh				
	Save	Cance	Changed Record	s: 0	1	Budget Period:	1920	[	Approve				
А	sset Clas	s		Project Name	Asset	Vote Number	Multi Year	Single Year	Renewal Of Existing Asset	New Asset	Start Date	Projected Co	mpletio
		Improved Pr	operty										^
- F		Unimproved	Property										
	Other												
	-	cal or Cultivat	ted Assets										
	Intang	ible Assets											
		iter Equipmen											
		ure and Office											
		nery and Equi	pment										
		oort Assets											
	Librari												
	Zoo's,	Marine and N	on-biological Animals										~
<													>

#### How to approve budget

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The user should first select the project and click approve. The system will confirm the approved project budget. Click yes to continue. See below windows.

Pix	oject Budget											-	a ×
	Project Bude	get View											Θ
	Welcome to Project Budge	-											
	Use this to tree view to all Double click to drill down.	d project budgets											
						* De							
ι	Actual Current years	1819	Darrer			* He	famb						
	Save Cancel Changed Records: 0		Dudge	Period: 192	9	Acc	nave						
1	kowd Class	Project Name	Acearl	Vote Norther	Malk Year	Single Year	Reneval Of Existing Asset	New Asset	Start Date	Projected Completion Date	Liseful Life	DepreciationConvert15819	Depreciation/Radig
	Infrastructure											0.00	
	Community Assets											0.00	
ĉ.	Heritage assets				0							0.00	
	Investment properties											0.00	
	Other assets											0.00	
	Bological or Cultivated Assets											0.00	
	Interglike Asserts											0.00	
	Computer Equipment											0.00	
	<ul> <li>Purniture and Office Equipment</li> </ul>											0.00	
	Machinery and Equipment											0.00	
	Transport Assets											0.00	
	Ubraries											0.00	
	Zoo's, Marine and Non-biological Animals											0.00	



The system will lock the budget approved, click yes to continue.

Confirma	ation	×
?	If you continue this budget will be locked. Continue?	
	Yes No Cancel	]

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The approve function will be greyed out after the project has been approved. See below picture.

Ρ	roject Budget					—	×
		Project Budget View					0
		Welcome to Project Budget View.					
		Use this to tree view to add project budgets. Double dick to drill down.					
		Actual Current year: 1819	Current Year:	1819 🔻	Refresh		
	Save Cano	Changed Records: 0	Budget Period:	1920	Approve		

## **Budget Reports**

### How to view budget reports

The user should click on Budget reports and budget reports window will appear. See below picture.

$\mathbf{Q}_{i}$								01 - 2018-10-31)   V		18-10-01 - 2018-10-31)			– a ×
1	Home	A IDP	🙀 Project	S Asset Register	Aaintenance	insurance	Meters	Functions	Verification	Attachments	📋 Reports & Exports	😽 mscoa	External So
	~	Ê											
IDP	Project Budget	Budget Reports											
Buc	lget Re	enorts											
Name	gorne		cription										
Capital e		SA34b Cap	ital expenditure o	new asset by Asset CI received of existing asso	ts by Asset Class / Sub	dass. This report is fi	ormatted as the sta		4.				

Double click on the budget project to view and the report will open. See below picture.

TEST										
CLIENT									SA34d	
	2015/16	2016/17	2017/18	Cu	rrent Year 2018/	19	2019/20 Medium Term Revenue & Expenditure Framework			
Description	Audited Outcome	Audited Outcome	Audited Outcome	Original Budget	Adjustment Budget	Full Year Forecast	Budget Year 2019/20	Budget Year +1 2020/21	Budget Year +2 2021/22	
frastructure	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Roads Infrastructure	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Roads	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Road Structures	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Road Furniture	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Capital Spares	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Storm water Infrastructure	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Drainage Collection	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Storm water Conveyance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Attenuation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Electrical Infrastructure	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Power Plants	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
HV Substations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
HV Switching Station	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
HV Transmission Conductors	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
MV Substations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
MV Switching Stations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
MV Networks	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
LV Networks	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Capital Spares	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Water Supply Infrastructure	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Dams and Weirs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Boreholes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Reservoirs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Pump Stations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Water Treatment Works	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	