

# PUBLIC FINANCE MANAGEMENT KNOWLEDGE QUERIES PORTAL

USER MANUAL FOR USERS OF THE SYSTEM

**OFFICE OF THE ACCOUNTANT-GENERAL** 

**OCTOBER 2014** 



October 2014

Published by the National Treasury

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# User Manual

# Enquiry Logging and Tracking System

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## 1. Go to the PFM Knowledge Queries Portal Site (log-in / register)

- a) Go to <u>http://pfmportal.treasury.gov.za/Pages/splash.aspx; or click on the</u> PFM Knowledge Queries Portal Link on the National Treasury Website:
- b) Click "Login / Register"

		8
Login / Register		
Capacity Development Strategy for P	ublic Finance Management (CDS)	
The Capacity Development Strategy for Public Finance Management (CDS development of high performance public financial management.	) represents National Treasury's coherent strategy and plan of action to sup	pport the

## 2. Registration

- a) First time users must register on the Queries Portal before attempting to log onto the system with a user name and a password; and
- b) After registering on the Queries Portal, users must enter their user name and password as per their registration.

User Name:				
Password:				
	ОК	]	Forgot Password	
			Windows Authentication	
			Register	

#### 3. User Registration

- a) **User Name**: This field may only be completed with the e-mail address that the institution has allocated to user;
- b) First Name and Last Name: This is self-explanatory.
- c) **E-Mail Address:** This field will be completed automatically when the user completes the **User Name** field in **(a)**; hence no action is required;
- d) **Enter Password:** The user must enter a password that is at least 8 characters in length and which must contain a capital letter, a number and a symbol;
- e) **Confirm Password:** The password entered in this field must be exactly the same as the password that was provided in the **Enter Password** field in (d);
- f) **E-Mail:** This field will be completed automatically when the user completes the **User Name** field in **(a)**; hence no action is required;
- g) **Telephone Number:** The user must complete this field with the number that he or she would prefer to be contacted on;
- h) **Client:** The user must use the drop down list to select the institution that he or she works for;
- i) **Verification:** The verification code in the greyed out box must be entered in the box below the block that contains the verification code;
- j) Cancel: The user may click on the "Cancel" tab should he or she want to cancel his or her user registration. Please note that this can only be done if the user has not already clicked the "Register" tab to complete his or her registration; and
- k) **Register:** Click on the "Register" tab to complete your registration.

Ω	User Registration	n
	User Name: *	james.mitsimbi@health.gov.za
	First Name:*	James
	Last Name:*	Mitsimbi
	E-mail Address:*	james.mitsimbi@health.gov.za
	Enter Password:*	•••••
	Confirm Password:*	•••••
	Email:	james.mitsimbi@health.gov.za
	Tel: *	012 312 0567
	Client:	Health - Council for Medical Schemes
	Verification: *	Enter the above code here: S6ICP Can't read this? Click here for a different phrase.
		Register Cancel



D	Enter your us	sername and password.	
	User Name:	james.matsimbi@ health.gov.za	
	Password:	•••••	
		ОК	Forgot Password
			Windows Authentication
			Register

# Once on landing page click "PFM Knowledge Platform"

PFM HOWLEDGE PLATFORM PFM KNOWLEDGE PLATFORM Login / Register	discover   create   share
Capacity Development Strategy for Public Finance Management (CDS) represents National Treasury development of high performance public financial management.	anagement (CDS) s coherent strategy and plan of action to support the



October 2014

# 4. Select FAQs to identify if an answer to your enquiry already exists

PFM HNOWLEDGE PLATFORM		discover   create   share
	User Profile 🕴 FAQs Query Admin 🔹 Log a query	testsecurity / EDIT LINKS Search this site /
Capacity Deve	lopment Strategy for Public Financ	e Management (CDS)

## 5. Select the relevant FAQs

PFM HNOWLEDGE PLATFORM						8
	FAQs Lo	og a Query Use	r Manual User Profile	Provide Feedback	EDIT LINKS Search this site	
FAQ's						
Question						
Tune of Question + Bude	et Palated (1)					
B Type of Question : Budg	et Kelated (1)					
∃ Type of Question : Com	mittees (1)					
Type of Question : Finar	icial (33)					
Description : Accounting	g Policies, Estima	ites and Errors (2)				
Description : Accounting	policies, Estima	ites and Errors 2 (1)				
Is the change to reclas	sify assets held t	for distribution from	capital assets to inventor	a change in accounting p	olicy?	
B Description : Agent-Prin	cipal Disclosures	5 (3)				
Description : Capital Ass	ets (S)					
Description : Cash Flow	Statement (1)					

PFM HNOWLEDGE PLATFORM		October 2014
PFM KNOWLED PLATFORM	DGE	discover   create   share
	FAQs Log a Query Query Admin • User Manual Provide Feedback / EDIT LINKS	User Profile List Admin • Search this site
FAQ's Question Answer	Is the change to reclassify assets held for distribution from capital assets to inventory a change in accounting policy? No. Similar to 2.4.1 above, it is a change in classification. A change in accounting policy is a change in the accounting treatment, recognition or measurement of a transaction, event or condition to what was previously applied. Classifying assets held for distribution that were previously classified as capital assets to inventory as these assets meet the definition of inventory, is a classification change and not change in accounting policy.	
Service Domain	PFMA Implementation	
Type of Question	Financial	
Description	Accounting Policies, Estimates and Errors 2	
Created at 8/27/2014 Last modified at 8/27	3331 PM by □ Oral Matsimbi Close //2014 331 PM by □ Oral Matsimbi	

# 6. If FAQs are not helpful – Select "Log a Query" from the menu

a) All queries previously logged by the user will be displayed here.

PLATFORM						
	User Profile	FAQs	Query Admin	Log a query	/ epin upika	Search this she
Log a Query						
To log a new query click or	the 'new item' link	below.				
() new tem						
• new item	Tanir Datelanned	Cone of	Paral and Tate			



## 7. Click "New Item" to log a new enquiry

a) The page on paragraph 8 below will open showing the enquiry submission form



## 8. Complete the form and submit / log the enquiry

- a) The system completes the top part of the form based on the user's registered profile;
- b) Confirm that the contact details are correct and amend if necessary;
- c) Select 'PFMA' or 'MFMA' as an appropriate topic for your enquiry;
- d) The user must include a clear description of the subject matter and type the nature of his or her enquiry;
- Query type at this stage, the Queries Portal is only designed to deal with enquiries related to the interpretation and application of the PFMA and MFMA;
- f) The user must upload any documents related to his or her enquiry by clicking on the tab 'Click here to attach a file'; and
- g) The submit tab must be clicked log the enquiry.

PFM HOOWLEDGE PLATFORM	Octo	ber 2
PFM KNOWLEDGE PLATFORM	discover   create   share FAQs Log a Query User Manual User Profile Provide Feedback / torr uses. Search this alte	2
	Queries	
	Queries	
	New Query	
	Clients Details Please ensure that your contact details are correct. If you need to change it go to your "User Profile" and update your details there.	
	Username dkrywanio@gmail.com	
	Email Address dkrywanio@gmail.com	1
	Tel No 013 1234 567	
	Client: Agriculture, Forestry and Fisheries - Marine Living Resources Fund	]
	Query Details	
	Please ensure that your capture your query correctly as you wont be able to modify it afterwards. If you would like to make a change close this query and open a new one.	
	Quiry	
	Query Type Interpretation / Clarification	
	Attachments B Click here to attach a file	
	Status Logged	

#### 9. Track progress of the enquiry

- a) Once the enquiry has been submitted or logged, the user will receive an e-mail within one business day confirming receipt and indicating that an employee in the National Treasury will be allocated the enquiry for a response directly to the user.
- b) After the enquiry has been allocated to an employee in the National Treasury, the user will receive an e-mail with a service commitment to provide a response within a certain number of days. The number of days to be taken will be determined by the complexity of the enquiry.
- c) The user may track the status of the enquiry at any time by viewing the list of his or her logged queries that have been logged on the Queries Portal. Refer to point 7 above.

#### **10.** Finalisation of the enquiry

After the enquiry has been finalised, an e-mail is forwarded to the user with a response.

## 11. Feedback from the user in relation to the response

Upon receipt of a response in relation to a particular enquiry, the user has the opportunity to provide the National Treasury with feedback whether he or she is satisfied. This feedback can be provided as follows:

- a) The user must select the enquiry from the "Log a Query" screen;
- b) Feedback must be provided whether he or she is satisfied or not with the response. If the user is not satisfied, he or she must provide reasons; and
- c) If the user selects the "not satisfied" tab, the relevant official within the National Treasury that provided the response will contact the user.

#### 12. Closure of enquiry

- a) The enquiry shall be closed if the user indicates that he or she is satisfied with the response.
- b) If the user does not provide feedback to the National Treasury within 5 working days from forwarding the response, the Queries Portal will automatically close the enquiry.