# Asset Management Workspace User Guide

## Real Estate Manager

## Version 26.1

# Document Information

## Notices

### Copyright



The information contained in this document represents the current view of insightsoftware.com on the issues discussed as of the date of publication. This document is for informational purposes only. insightsoftware.com makes no representation, guarantee or warranty, expressed or implied, that the content of this document is accurate, complete or up to date.

### Disclaimer

This guide is designed to help you to use the Real Estate Manager applications effectively and efficiently. All data shown in graphics are provided as examples only. The example companies and calculations herein are fictitious. No association with any real company or organization is intended or should be inferred.

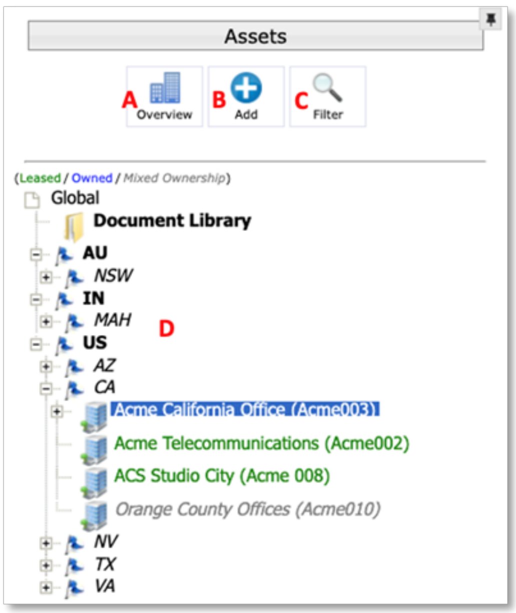
# Contents

# The Asset Management Workspace

The Asset Management workspace is where you can add, edit, or delete Assets that are organized in a hierarchy referred to as an Asset Tree. The workspace displays a Global Map that identifies the location of all Assets using the Single Asset or Multiple Asset icons. Once you select an Asset, the workspace will include a series of tabs defined by the Asset Type and Asset Ownership. For more information on visible tabs, please see the Real Estate Manager User Guide to Asset Types.

# Asset Tree

Within the Action Panel in the Asset Management workspace, all Assets are listed in a hierarchical tree. Assets are grouped by location and are color coded by Ownership Type.




**Green** – Leased Asset

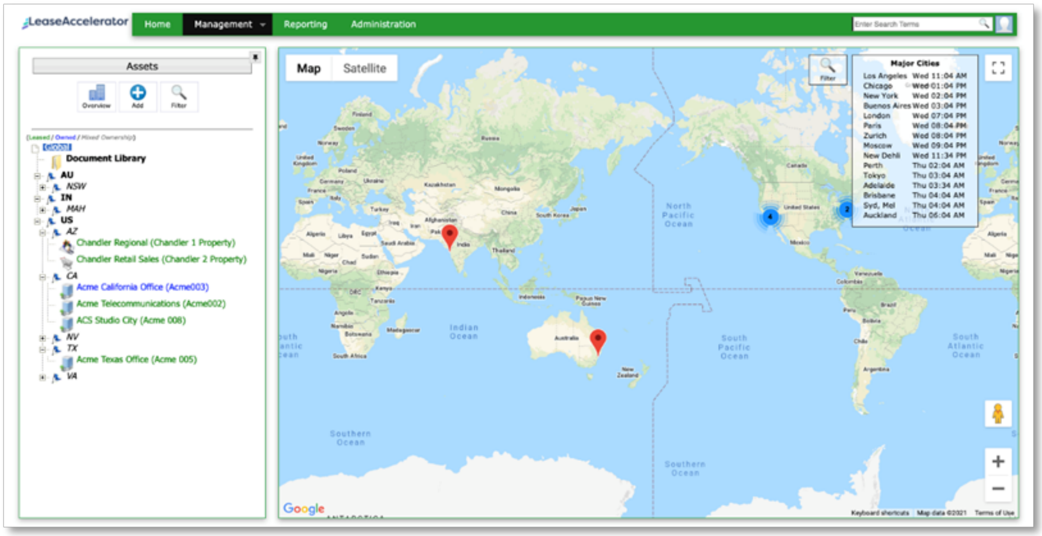
**Blue** – Owned Asset

**Black Italics** – Mixed Ownership

| Action Panel Component | Reference | Description |
|---|---|---|
| Overview | A | Displays the Global Map from any workspace within Asset Management. |
| Add Asset | B | Accesses the function to add an Asset. |
| Filter Icon | C | Allows you to search for Assets using various criteria. |
| Asset Tree | D | Displays all Assets by location. |

# Accessing an Asset from the Global Map

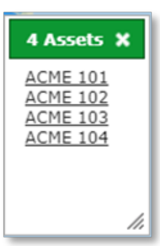
1. From the Top NavBar, select **Management** and then **Assets**. The Asset Management workspace displays, and you will see the Global Map.




2. Within the Global Map, you will see the Asset locations. You may use the **Increase** and **Decrease** icons to change the area displayed. You may also click and drag the Global Map to display a different area.

3. To access a single Asset, click on the **Single Asset** icon.

4. To access an Asset where multiple Assets are located, click the **Multiple Asset** icon. The Assets pop-up opens, listing the Assets at that particular location. Click the Asset you want to access.

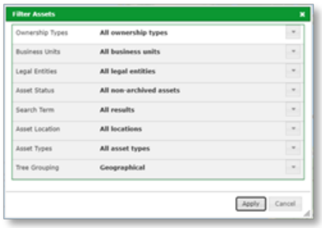



5. To return to the Global Map, click **Overview** in the Action Panel.

# Searching for an Asset Using the Filter

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Filter** icon.




3. From the Ownership Type drop-down, select an Ownership Type. Press Ctrl+Click to select multiple Ownership Types.

4. From the Business Units drop-down, select a Business Unit.

5. From the Asset Status drop-down, click the **Show Archived** checkbox to include Archived Assets in the search.

6. In the Search Term field, enter text for the Asset Identifier you defined when adding the Asset.

7. From the Asset Location drop-down, select the location of the Asset you want to access.

8. From the Asset Types drop-down, select the Asset Type.

9. From the Tree Grouping drop-down, select the method in which you want the Assets that meet the search criteria to display.

10. Click **Apply**. Assets that meet the search criteria display in the Asset Tree.

11. Click the **Expand** icon to show multiple Assets at one location.

12. Click the Asset you want to access.

13. In the Action Panel, click the **Show Filters** link to display the search criteria used. Search criteria display in bold text.

14. Click the **Hide Filters** link to close the search criteria displayed.

# Asset Workspace Tabs

Within Asset Management, each Asset will display with a predefined set of tabs. Each tab contains data related to a particular Asset. Data may be edited through each tab except the Summary tab. To define which tabs appear for an Asset Type, please see the Real Estate Manager User Guide to Asset Types.


# View a Summary of the Asset

The Summary tab contains an overview of the Asset. It is divided into sections that are described below. Information on the Summary tab cannot be edited. Information can be edited on the other tabs.

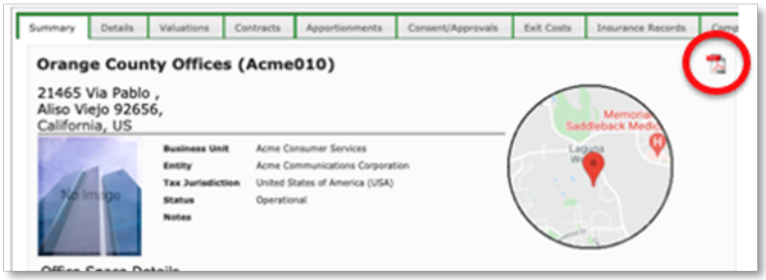
The Summary tab, provides information in the following sections:

- **Asset Details** – lists the Asset address and related map, photograph if uploaded, Entity and Business Unit assigned to the Asset, and the Asset Contract Costs Summary that provides the total Contract commitments.
- **Contracts Summary** – lists every contract related to the Asset, total amount, Landlord and Lessee, and Critical Dates.
- **Valuation Summary** – lists all valuations defined for the Asset.
- **Compliance Summary** – lists Compliance Items and the status, including non-compliant.
- **Asset Subdivision Summary** – lists the defined tax parcel identification and Subdivision purpose.
- **Child Asset Summary** – lists any Child Assets defined.
- **Asset Consent Approvals Summary** – lists any Consent Items that require approval, the required approval, and the related dates.
- **Exist Cost Summary** – lists any costs or penalties defined for exiting the lease prior to the end date.
- **Tasks Summary** – lists Tasks defined, due date, and identifies any overdue Tasks.
- **Apportionment Summary** – lists the Divisions and Subdivisions that are allocated costs on a percentage basis and the split percentages and accounting codes.
- **Files Summary** – lists any files that have been uploaded for the Asset.

# Printing the Asset Summary

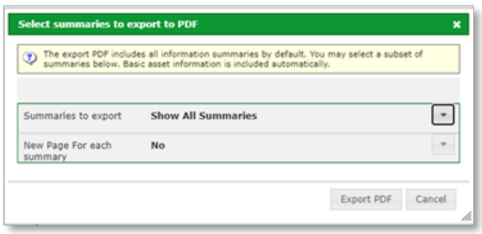
The Asset Summary also provides a PDF icon that allows you to print the Asset Summary.

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset and the Summary tab for the Asset will open.
4. Click the **PDF icon** in the Asset Details section.




5. From the Summaries to export drop-down, select the section(s) of the Summary you want to print.

6. Press Ctrl+Click to select multiple sections.




7. From the New Page For each summary drop-down, select:

8. **No** to print the Summary on continuous pages.

9. **Yes** to print each Summary section on a separate page.

10. Click **Export PDF** to download and open the PDF to view.

# Viewing or Editing a Contract from the Summary Tab

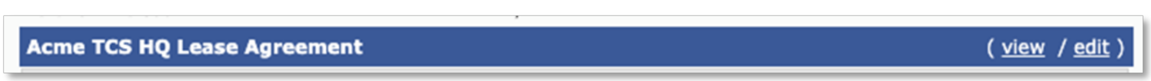
The Summary tab provides access to view or edit a Contract without navigating to the Contracts tab.

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset and the Summary tab for the Asset will open.

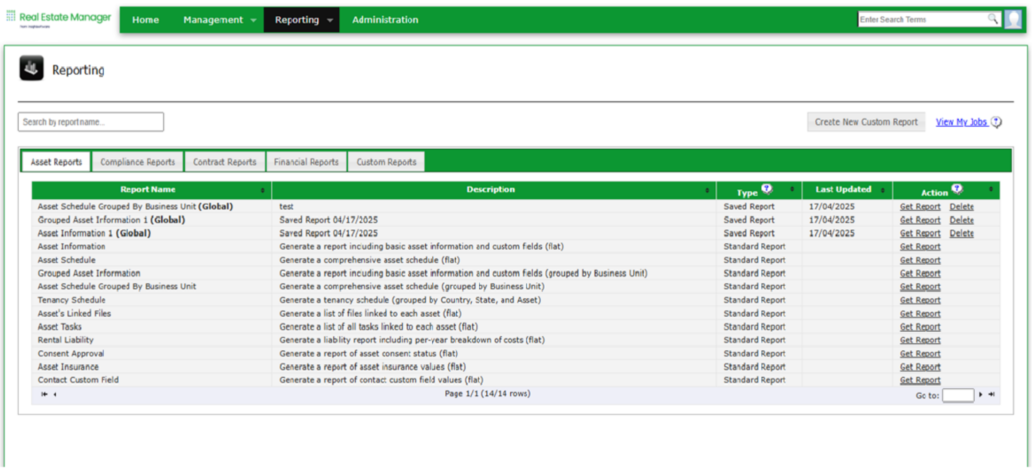
4. In the Contracts Summary section, click the **view** link to be taken to the specific contract in view mode.




5. Click the **edit** link to be taken to the specific contract, in edit mode.

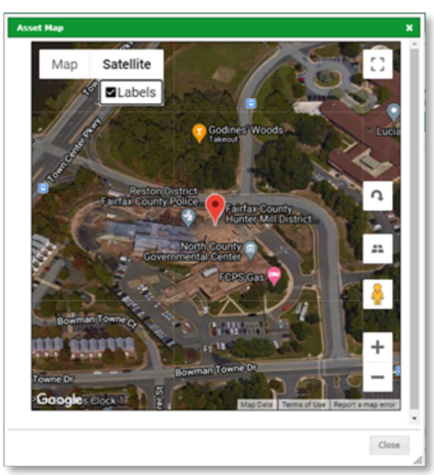
# View Details

The Details tab provides high-level information about the Asset, including access to location information and features as well as the edit function.




# Viewing the Street Map

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Go to the Details tab.
5. Click **Map** under the photograph field.



6. To change the view:
    a. Click the **Rotate** icon to rotate the map clockwise.
    b. Click the **Tilt Map** icon to raise the map perspective.
    c. Click the **Increase** or **Decrease** icons to enlarge or compress the area viewed.
    d. Click the **Full Screen** icon to open the map on the full browser screen.
    e. Click **Map** to display in a map format.
    f. Click **Satellite** to display in 3D imagery format.

7. Click **Close** to close the Asset Map pop-up.

# Uploading a Survey Plan

The Details tab allows you to upload a Survey Plan for the Asset.

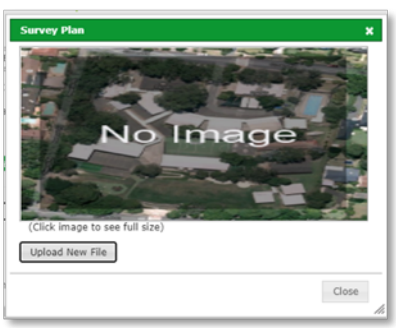
1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

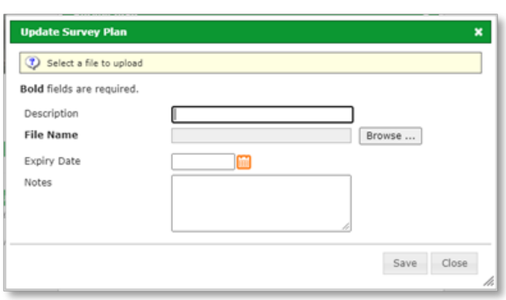
3. Select the Asset. The Summary tab for the Asset displays.

4. Go to the Details tab.

5. Click **Survey Plan** under the photograph field.




6. Click **Upload New File**.




7. In the Description field, enter information about the file.

8. Click **Browse** to find the file and select to upload.

9. Click **Open** and the file name displays in the File Name field.

10. To set an expiration date for the file, click the Expiry Date field or the Calendar icon and select the date on which the file expires.

11. In the Notes field, enter any additional information about the file.

12. Click **Save** to upload the file.


13. Click the image section to view the Site Survey in a separate browser window.

# Adding an Area Breakdown

The Details tab provides the function to set up measurements for areas in the Asset.

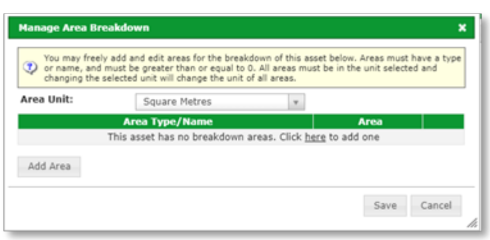
1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

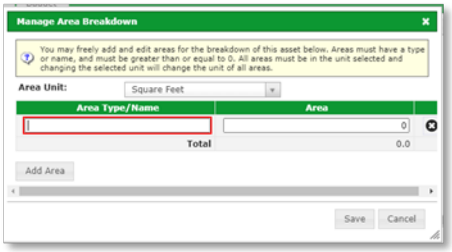
3. Select the Asset. The Summary tab for the Asset displays. You may stay on this tab or go to the Details tab.

4. Click **Manage Area Breakdown**.

5. From the Area Unit drop-down, select the measurement type.




6. Click **Add Area** to define the measurements for an area.




7. In the Area Type/Name field, enter an identifier for the area.

8. In the Area field, enter the number of square meters or square feet.

9. Click **Add Area** to continue to add information for new areas.

10. Click **Save**. The Area Breakdown displays on the Details tab.

Area Breakdown

| Description | Area (Square Feet) |
|---|---|
| Common Area | 2700 ft² |
| Storage | 1800 ft² |
| Mechanical | 2400 ft² |
| Total Described Area | 6900 ft² |

Manage Area Breakdown

# Editing or Deleting an Area Breakdown

An existing Area Breakdown can be updated, including the Area Unit and measurement data. They can also be deleted following the same steps.

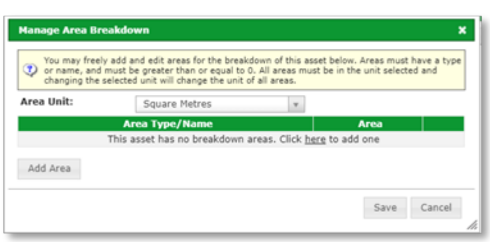
1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

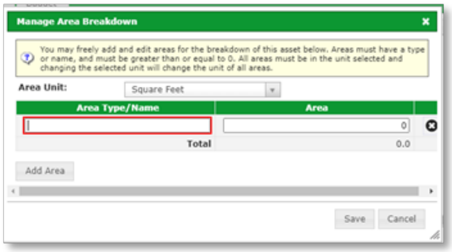
3. Select the Asset. The Summary tab for the Asset displays. You may stay on this tab or go to the Details tab.

4. Click **Manage Area Breakdown**.

5. From the Area Unit drop-down, change the measurement type as needed.




6. Click **Add Area** to define the measurements for an area, if needed.




7. In the Area Type/Name field, enter an identifier for the area if new, change if updating.
8. In the Area field, enter the number of square meters or square feet.
9. Click **Add Area** to continue to add information for new areas.
10. To delete an area, click the **Delete** icon and the row will be removed.
11. Click **Save**. The Area Breakdown displays on the Details tab.

Area Breakdown

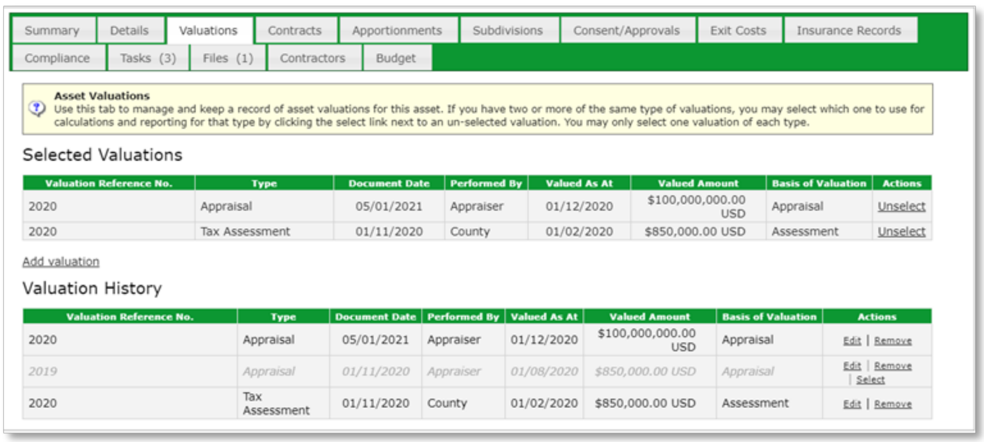
| Description | Area (Square Feet) |
|---|---|
| Common Area | 2700 $ft^2$ |
| Storage | 1800 $ft^2$ |
| Mechanical | 2400 $ft^2$ |
| **Total Described Area** | 6900 $ft^2$ |

Manage Area Breakdown

# Maintaining Valuations in the Asset Management Workspace

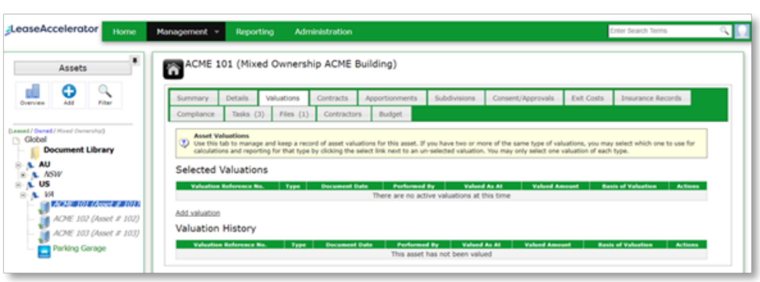
In the Asset Management Workspace, the Valuations tab tracks valuations. Valuations are organized by Type of Valuation. You can define multiple valuations, but only one Valuation for each Type can be selected for calculations and reporting.

The Valuations tab lists valuations maintained in Real Estate Manager. The Selected Valuations sections shows Valuations active in the system and used in calculations. The Valuation History section lists all Valuations added in the system. Valuations that are not selected are dimmed. Any Valuation in the Valuations History section can be selected.

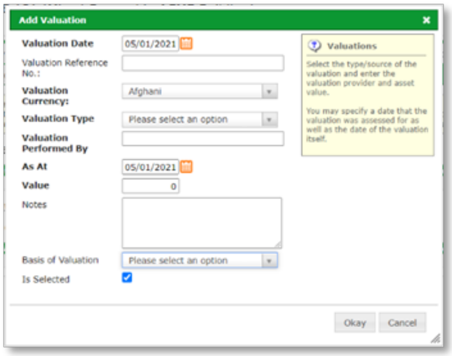



# Adding a Valuation

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click on the **Valuations** tab.




5. Click **Add Valuation**.
6. Click the Valuation Date field or click the Calendar icon to display the calendar and select the appropriate date.




7. Enter identifying information in the Valuation Reference No. field.

8. From the Valuation Currency drop-down, select the currency the Valuation uses.

9. Enter the Entity or person who valued the Asset in the Performed By field.

10. From the Valuation Type drop-down, select the Valuation Type.

11. To add a new Valuation Type, enter the name in the Valuation Type field and click the **Add and select?** link.

12. To define date the Valuation was made, click the **As At** field or the Calendar icon to display the calendar and select the appropriate date.

13. Enter the Valuation in the Value field.

    **Note:** Do not use commas in monetary values.

14. In the Notes field, enter additional information.

15. From the Basis of Valuation drop-down, select the foundation for the Valuation.

16. To add a new Basis for Valuation, enter the name in the Basis for Valuation field and click the **Add and select?** link.

17. When you add a new Valuation, the **Is Selected** checkbox is automatically checked and will record the new Valuation to be used for calculations within they system. If you do not want to use the Valuation you are adding for calculations, click to uncheck the **Is Selected** checkbox.

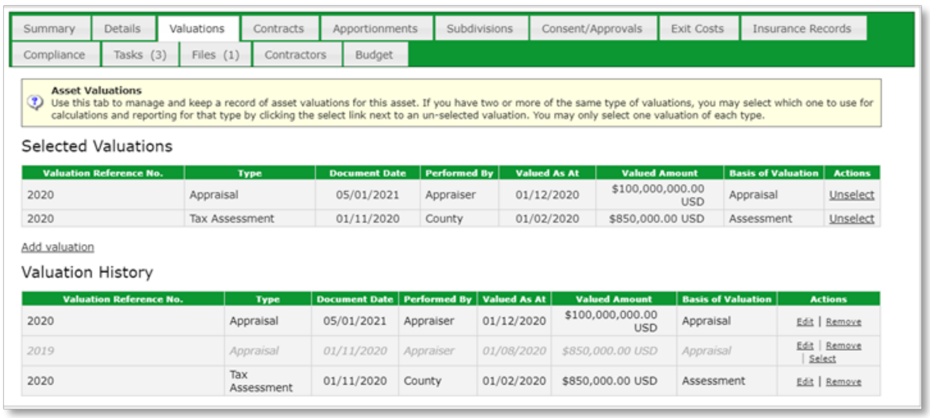
18. Click **Okay**. The Valuation displays on the Valuation tab.

# Selecting a Valuation

You can select one Valuation for each Valuation Type. When you add a new Valuation, it is automatically used as the Selected Valuation unless you uncheck the Is Selected checkbox. You can select any other Valuation listed in the Valuation History at any time.

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click on the Valuations tab.

> **Note:** The selected Valuation is listed under **Selected Valuations**. All other Valuations available are listed under **Valuation History** and may be selected.

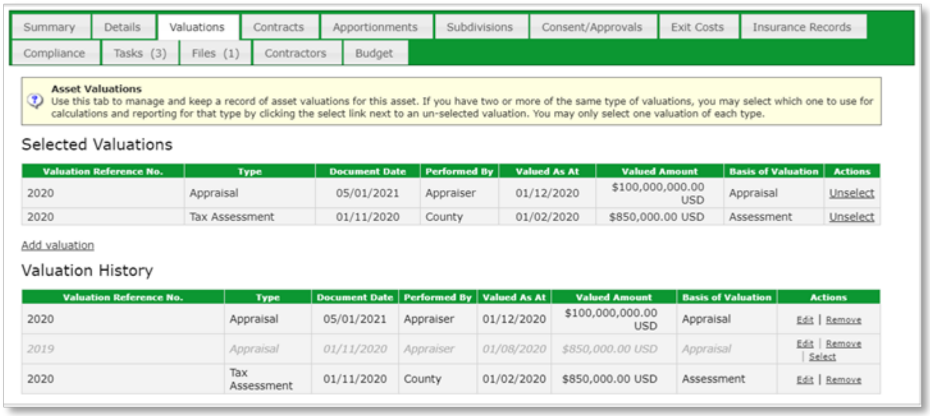



5. To select a Valuation, in the Valuation History section, click **Select**. The Valuation will display in the Selected Valuations section.
6. To move and remove a Valuation from the Selected Valuations section, click **Unselect**. The Valuation will display in the Valuation History section.

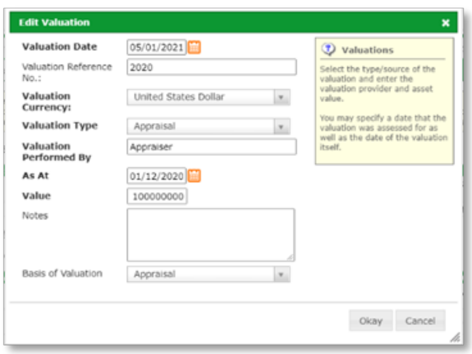
# Editing a Valuation

You can only edit Valuations that are not Selected Valuations. To edit, the Valuation must be in the Valuations History section on the Valuation tab.

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click on the Valuations tab.




5. In the Valuations History section, click **Edit** for the Valuation you want to edit.




6. Change any field as necessary.

7. Click **Okay** to save changes to the Valuation.

# Deleting a Valuation

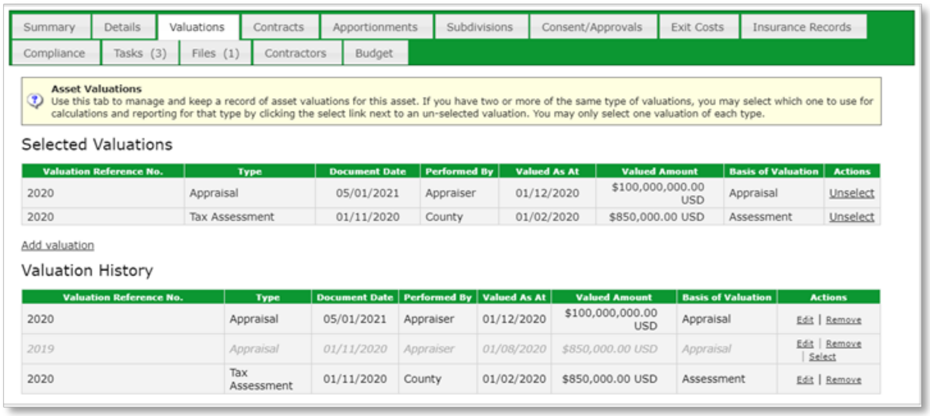
You can delete any Valuation listed in the Valuations History section. You can delete a Valuation listed in the Selected Valuations section by moving it to the Valuations History section.

1. From the Top NavBar, select **Management** and then **Assets**.

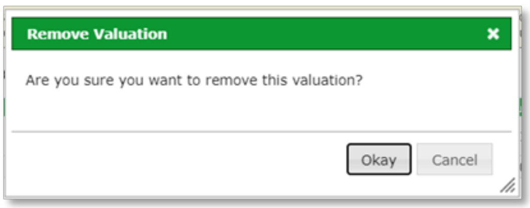
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

4. Click on the Valuations tab.




5. In the Valuations History section, click **Remove** for the Valuation you want to delete.




6. Click **Okay** in the Remove Valuation confirmation pop-up. The Valuation is deleted.

# Managing Asset Contracts in the Asset Management Workspace

Real Estate Manager allows you to manage a wide range of contracts associated with an asset, including leases, sub-leases and maintenance or service agreements. Contracts are configured in the Administration workspace and are defined by:

- **Contract Category** – a group of contracts with similar characteristics.
- **Contract Type** – a single contract defined within a Contract Category.

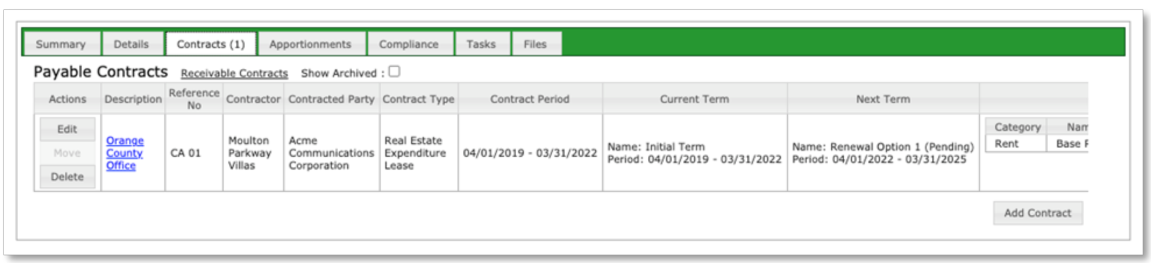
For example, a Lease Contract Category could include office leases, parking leases and subleases. A Service Contract Category might include security contracts and janitorial contracts. All contracts can be defined as payable (where payments are required to be made to a third-party for a right of use asset, or for goods and services) or receivable (where payments are received from third parties, such as when you are sub-leasing a portion of your leased premises).

Each Contract Type can have Custom Clause Groups and Data Fields configured in the Administration workspace. This allows you to define the clauses and data fields most relevant to your business.

Please see Adding a Contract to learn how to enter a new contract.

## Editing a Contract

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click on the **Contracts** tab.

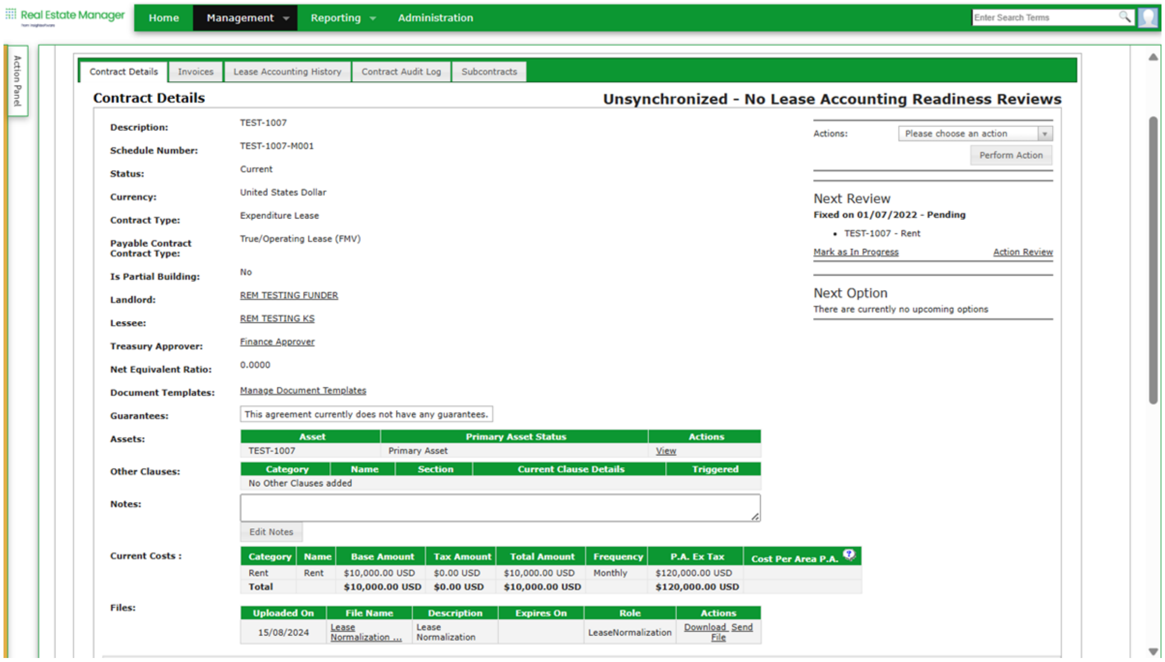



5. Click **Payable Contracts** or **Receivable Contracts** to select the Contract Direction you want to edit. The existing contracts will display.

   > **Note:** System will default to display Payable Contracts.

6. In the Actions column, click **Edit** for the contract you want to edit.
7. Any information in Contract Details may be edited.

8. Refer to Adding a Contract for more details on each section within the Contract workspace.




9. To save the edits, click **Save Contract**.

10. Add any notes to the Save Contract pop-up for audit purposes and then click **Okay**.

# Updating Contract State to Holdover

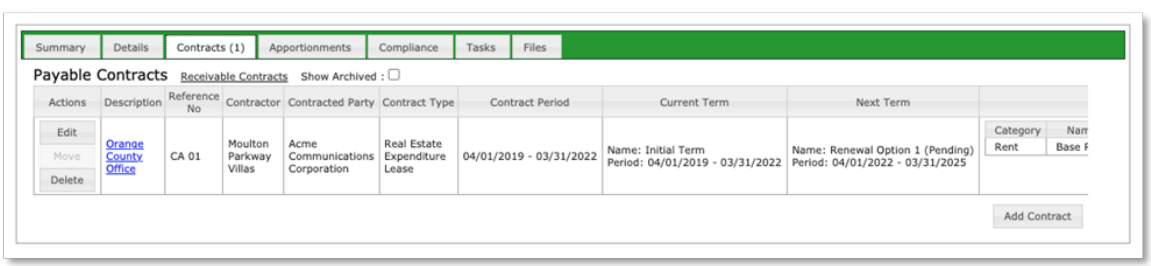
After expiration of a rental lease, Real Estate Manager allows the contract to be placed in a Holdover state, indicating that the lease term has expired, but the tenancy continues.

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

4. Click on the Contracts tab.

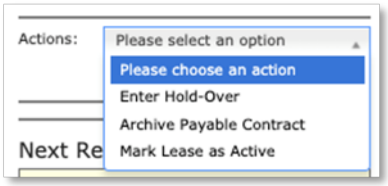



5. Click **Payable Contracts** or **Receivable Contracts** to select the Contract Direction you want to view. The existing contracts will display.

**Note:** System will default to display Payable Contracts.

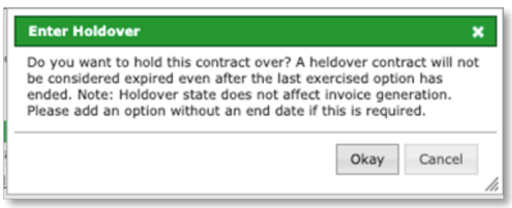
6. Click the contract hyperlink in the Description column to view the contract to want to update.

7. From the Contract State drop-down, select **Enter Hold-Over**.




8. Click **Perform Action**.

9. In the Enter Holdover pop-up, click **Okay**. The contract state will update to Holdover.



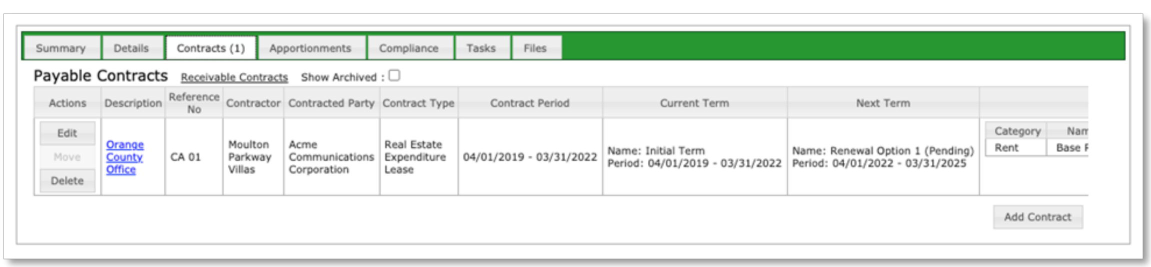

# Deleting a Contract

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

4. Click on the Contracts tab.



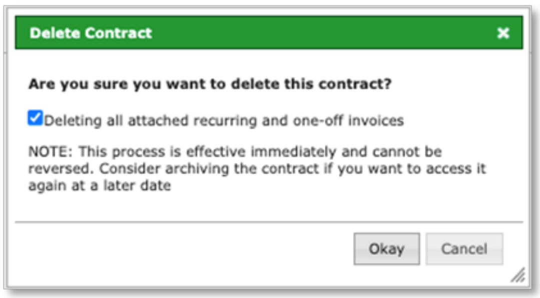

5. Click **Payable Contracts** or **Receivable Contracts** to select the Contract Direction you want to edit. The existing contracts will display.

**Note:** System will default to display Payable Contracts.

6. In the Actions column, click **Delete** for the contract you want to delete.

7. Verify that you want to delete the contract and indicate if you should delete all attached recurring and one-off invoices as well.

8. By default this box is checked. Remember, once you complete this action, you cannot undo it.




9. Click **Okay**.

# Moving a Contract to Another Asset

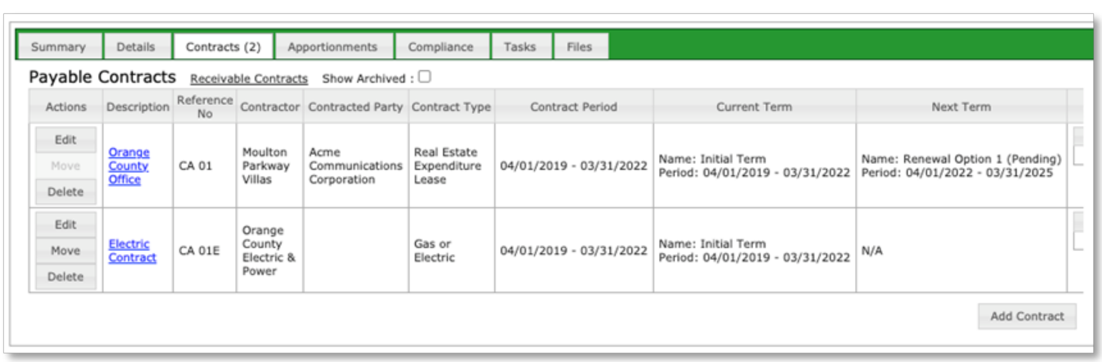
Contracts can only be moved if the Contract Type is **NOT** Lease Accounting Significant. This is a configuration set when the Contract Types were configured in the Administration workspace within the Contract Types tile. Please refer to for more information. Additionally, you can only have one asset attached to a contract for it to be eligible to be moved.

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

4. Click on the Contracts tab.



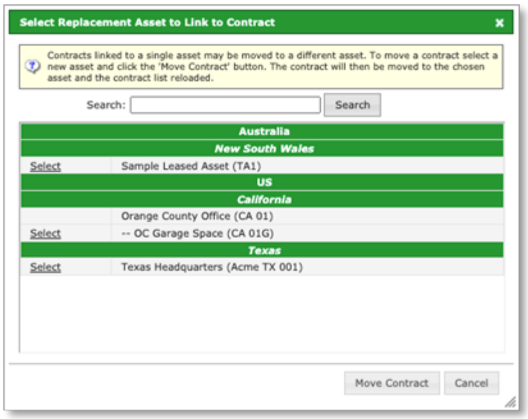

5. Click **Payable Contracts** or **Receivable Contracts** to select the Contract Direction you want to edit. The existing contracts will display.

> **Note:** System will default to display Payable Contracts.

6. In the Actions column, click **Move** for the contract you want to move to another asset.

   **Note:** If the option to Move is grayed out and unable to click on, then this contract is not eligble to be moved.

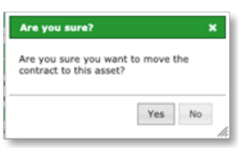
7. In the Select Replacement Asset to Link to Contract pop-up, click **Search**. You may enter a full or partial search term in the Search field to display Assets that match the search term.




8. Click **Select** for the Asset to which you want to move the contract.

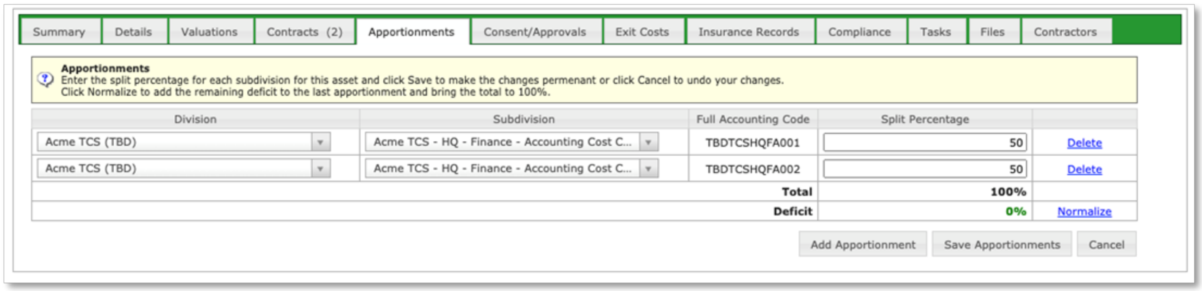
9. Click **Move Contract**.

10. Click **Yes** in the pop-up. The contract is removed from display on the original Asset and displays on the Contracts tab of the Asset to which it was moved.



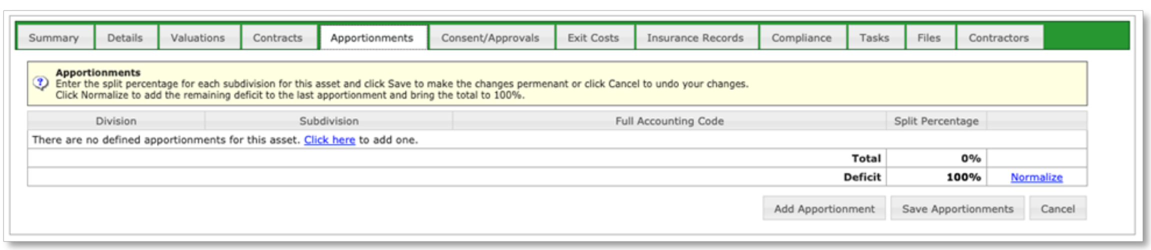
# Maintaining Asset Apportionments in the Asset Management Workspace

In the Asset Management Workspace, the Apportionments function allows you to distribute costs across multiple Divisions and Subdivisions and assigned accounting codes for an Asset. Divisions, Subdivisions, and the assigned accounting codes are defined in the Administration workspace within the Divisions tile. You cannot add or edit the defined Divisions, Subdivisions, or accounting codes from the Asset's Apportionment tab.

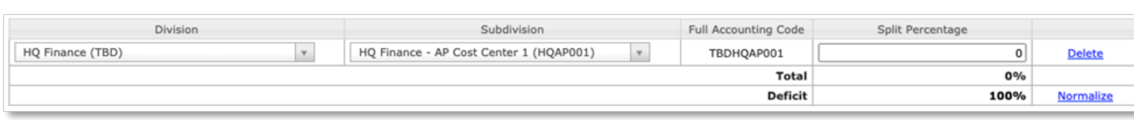



# Adding Apportionments

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click on the Apportionments tab.




5. To add the initial Apportionment, click the **Click here** link.
6. Select the appropriate Division and Subdivision from the drop-downs. Once the Division is selected, the choices in the Subdivision will populate with valid subdivisions.




7. In the Split Percentage field, enter the percentage that you want to distribute to the Subdivision.
8. To add additional Apportionments, click **Add Apportionment**.

9. In the new row, select the appropriate Division and Subdivision from the drop-downs.

10. Enter the appropriate percentage in the Split Percentage field.

11. Continue to add Apportionments as necessary, using steps 5-10.

12. To distribute the Split Percentage with a deficit, click the **Normalize** link. The Split Percentage field for the last Subdivision in the list updates and the Total field shows 100%.

13. Click **Save Apportionments**. The Apportionments are available for use in the Invoices workspace.

# Editing Apportionments

The same steps may be used to edit existing Apportionments. Simply change the Division and/or Subdivision drop-downs or adjust the split percentage as necessary and click **Save Apportionments** when done.

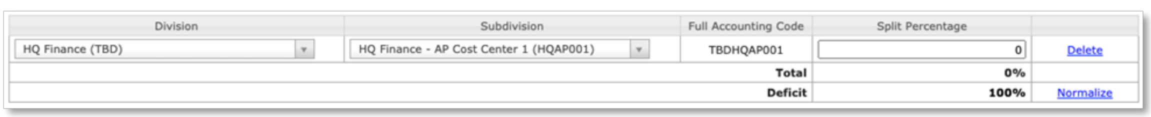
# Deleting Apportionments

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

4. Click on the Apportionments tab.




5. Click the **Delete** link in the row for the Apportionment you want to delete.

6. Continue to click the **Delete** link in each row of the Apportionment until all are deleted as desired.

7. In the Split Percentage field, enter the percentage that you want to distribute to the Subdivision, if applicable.

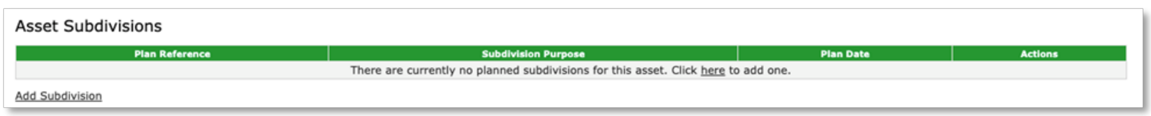
8. Click Save **Apportionments**.

# Maintaining Asset Subdivisions in the Asset Management Workspace

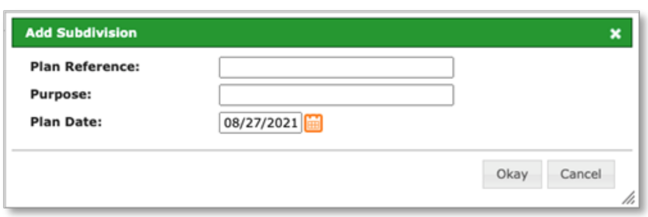
In the Asset Management Workspace, the Subdivision tab can be used to record the details of the tax parcels for individual assets.

## Adding a Subdivision

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click on the Subdivisions tab.
5. If no Subdivisions have been added, use the **click here** link or click **Add Subdivision**.




6. In the Add Subdivision pop-up, start by populating the Plan Reference field with the identifier that cross references to the tax parcel.

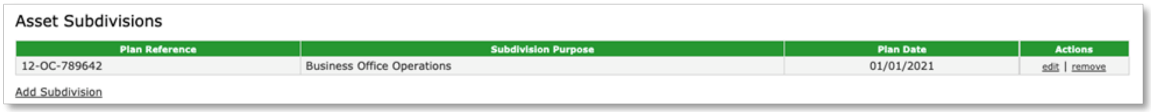



7. In the Purpose field, enter a description about how the parcel is used.
8. Click the Plan Start field or the Calendar icon to display the calendar and select the appropriate date.
9. Click **Okay**.

## Editing a Subdivision

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click on the Subdivisions tab.

5. Click **edit** for the Subdivision you want to edit.


Asset Subdivisions

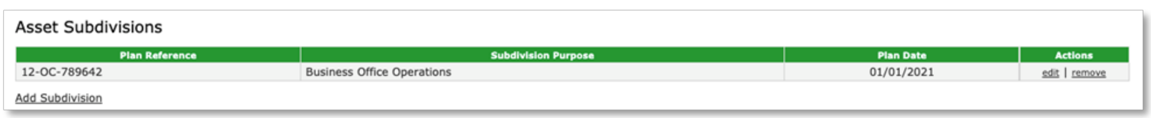
| Plan Reference | Subdivision Purpose | Plan Date | Actions |
|---|---|---|---|
| 12-OC-789642 | Business Office Operations | 01/01/2021 | edit \| remove |

Add Subdivision

6. Edit the Plan Reference, Plan Start, or Plan Start fields as necessary in the pop-up.
7. Click **Okay**. The updated Subdivision displays on the Subdivision tab.

# Deleting a Subdivision

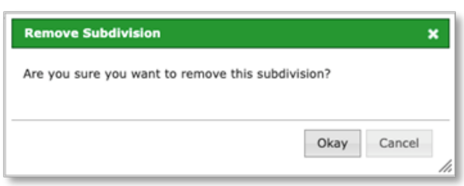
1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click on the Subdivisions tab.
5. Click **remove** for the Subdivision you want to delete.


Asset Subdivisions

| Plan Reference | Subdivision Purpose | Plan Date | Actions |
|---|---|---|---|
| 12-OC-789642 | Business Office Operations | 01/01/2021 | edit \| remove |

Add Subdivision

6. Click **Okay** in the Remove Subdivision pop-up.



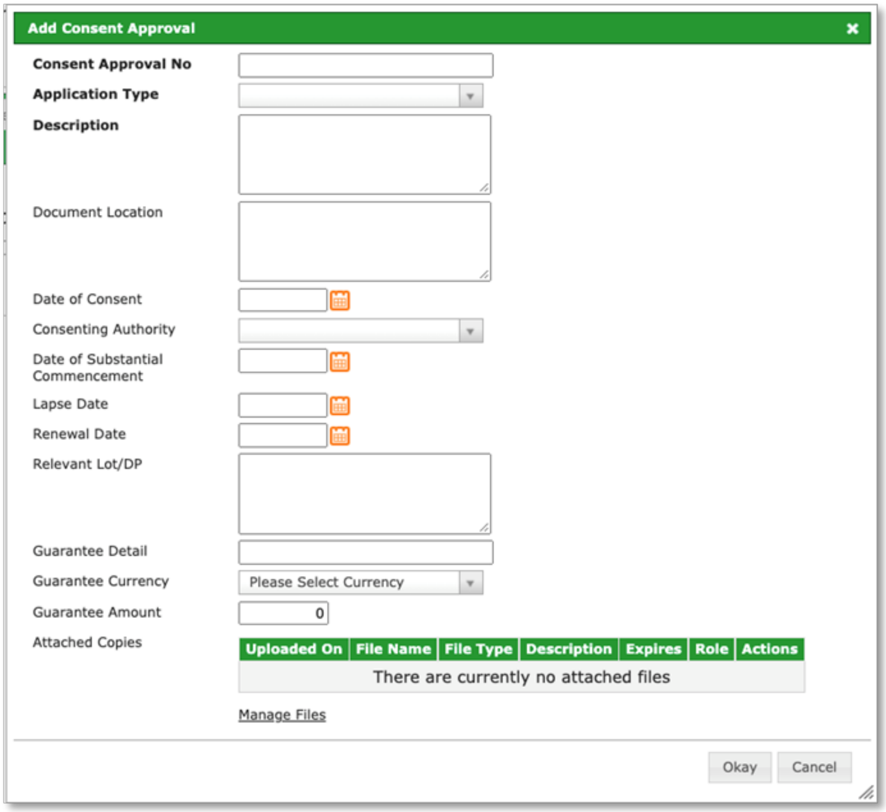
# Managing Asset Consents and Approvals in the Asset Management Workspace

In the Asset Management Workspace, the Consent/Approvals tab allows you to track details of approvals and consent applications that apply to individual assets.

## Adding a Consent/Approval

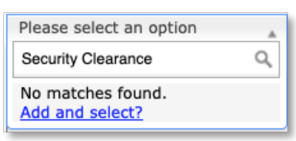
1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click the **Consent/Approval** tab.


5. Click the **Add Consent** button.
6. In the Consent Approval No field, enter an identifier.




7. From the Application Type drop-down, select the Application Type.

8. To add an Application Type, enter the label for the Application Type and click the **Add and select?** link.




9. In the Description field, enter information about the application.

10. In the Documentation Location field, enter information about where any supporting documentation can be found.

11. Click the Date of Consent field or the Calendar icon to display the calendar and select the date the consent was made.

12. From the Consenting Authority drop-down, select position or person who approved or consented.

13. To add a Consenting Authority, enter the label for the Consenting Authority and click the **Add and select?** link.

14. Click the Date of Substantial Commencement field or the Calendar icon to display the calendar and select the date the consented or approved action begins.

15. Click the Lapse field or the Calendar icon to display the calendar and select the date the consent or approval period ends.

16. Click the Renewal field or the Calendar icon to display the calendar and select the date the consent or approval is eligible for renewal.

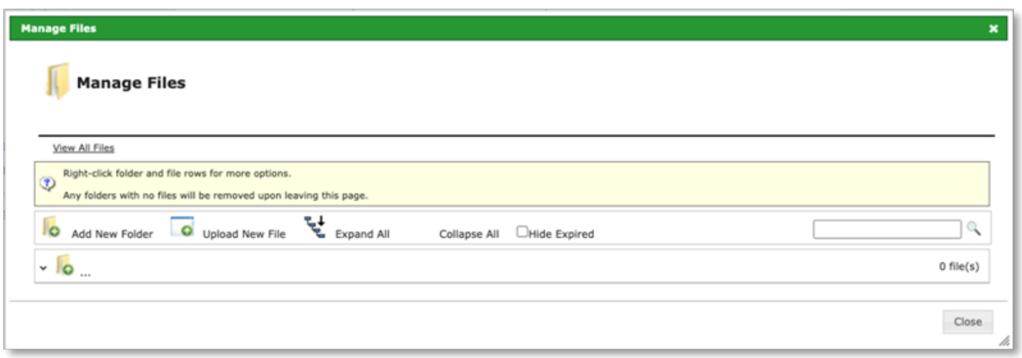
17. In the Relevant Lot/DP field, enter an identifier for the real estate site description.

18. For a related Guarantee, enter the Guarantee Detail, which is information that describes the Guarantee.

19. Choose the Guarantee Currency from the drop-down for the monetary currency used for the Guarantee.

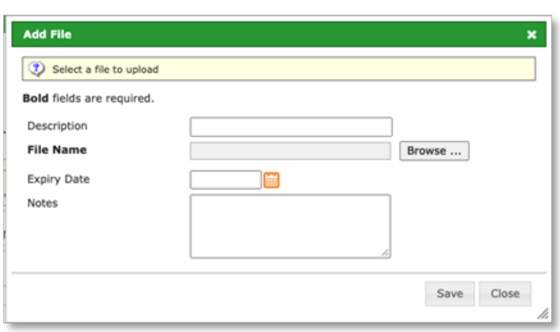
20. Enter the value of the Guarantee in the Guarantee Amount field.

21. To upload a document, click **Manage Files**.




22. Right-click the folder into which you want to upload a file and select **Upload New File**.

23. In the Description field, enter information about the file.




24. Click **Browse** to locate the file you wish to upload.

25. To set an expiration date for the file, click the Expiry Date field or the Calendar icon and select the date on which the file expires.

26. In the Notes field, enter any additional information about the file.

27. Click **Save**. The file uploads.

28. Click **Close**.

29. Click **Okay** on the Add Consent/Approval pop-up.

# Editing a Consent/Approval

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.


4. Click the Consent/Approval tab.

5. Click **edit** in the Actions column for the Consent/Approval you want to edit.

6. Edit the fields in the pop-up as necessary.

7. Click **Okay**.

# Adding a Variation to a Consent/Approval

Adding a variation to a Consent/Approval creates a new record of the Consent/Approval so that the original Consent/Approval remains available.

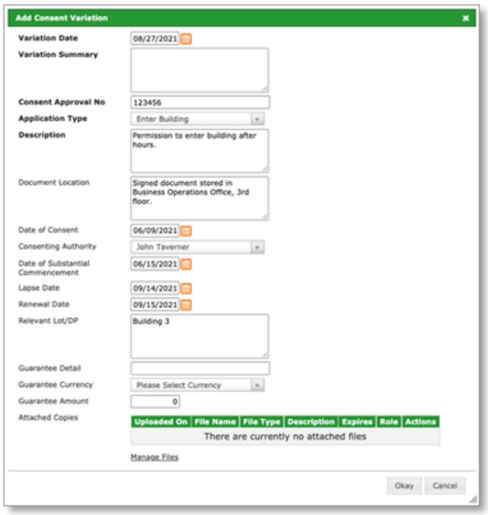
1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

4. Click the Consent/Approval tab.


5. Click **Add Variation** in the Actions column for the Consent/Approval you want to add a variation.




6. Click the Variation Date field or the Calendar icon to display the calendar and select the date of the variation.

7. In the Variation Summary field, enter information to describe the variation.

8. Edit the Consent/Approval No as needed.

9. Change the Application Type drop-down as necessary.

10. To add an Application Type, enter the label for the Application Type and click the **Add and select?** link.

11. Edit the Documentation Location as necessary.

12. Change the Date of Consent to reflect the date of the variation consent/approval.

13. Change the Consenting Authority as necessary.

14. Change the Date of Substantial Commencement to reflect the date the variation consent/approval is actioned.

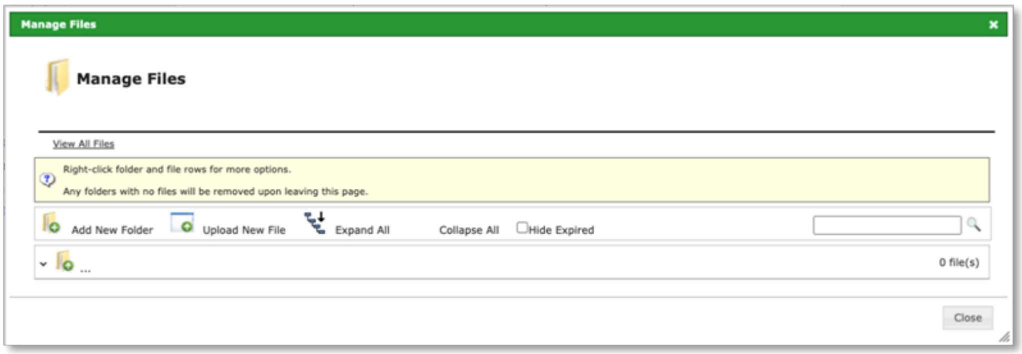
15. Update the Lapse Date field.

16. Update the Renewal Date field.

17. Edit the Relevant Lot/DP as necessary.

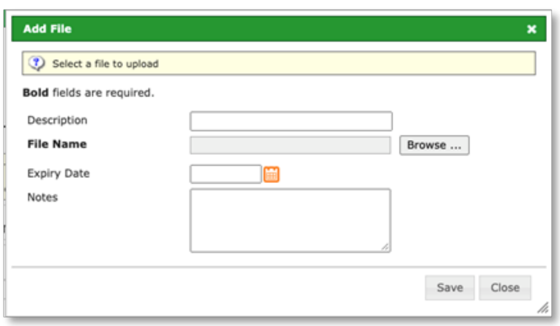
18. Enter any relevant Guarantee information.

19. To upload a document, click **Manage Files**.




20. Right-click the folder into which you want to upload a file and select **Upload New File**.

21. In the Description field, enter information about the file.




22. Click **Browse** to locate the file you wish to upload.

23. To set an expiration date for the file, click the Expiry Date field or the Calendar icon and select the date on which the file expires.

24. In the Notes field, enter any additional information about the file.

25. Click **Save**. The file uploads.

26. Click **Close**.

27. Click **Okay** and the Consent/Approval Variation displays under the original Consent/Approval.

# Archiving a Consent/Approval

An Archived Consent/Approval does not display on the Consent/Approval tab by default. You can display an Archived Consent/Approval by clicking the **Show Archived** checkbox.

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click the Consent/Approval tab.

Consent Approvals

Show Archived: ☐

| Consent Approval No | Application Type | Description | Date of Consent | Commencement | Lapse Date | Renewal Date | Relevant Lot/DP | Actions |
|---|---|---|---|---|---|---|---|---|
| 123456 Manage Files | Enter Building | Permission to enter building after hours. Signed document stored in Business Operations Office, 3rd floor. | 06/09/2021 - John Taverner | 06/15/2021 | 09/14/2021 | 09/15/2021 | Building 3 | edit \| remove archive \| Add Variation |

Add Consent

5. Click **archive** in the Actions column for the Consent/Approval you want to archive.

> **Note:** There is no confirmation pop-up, once you click Archive, the Consent/Approval is automatically archived.

6. To display archived Consent/Approval records, click the **Show Archived** checkbox.

Consent Approvals

Show Archived: ☑

| Consent Approval No | Application Type | Description | Date of Consent | Commencement | Lapse Date | Renewal Date | Relevant Lot/DP | Actions |
|---|---|---|---|---|---|---|---|---|
| 123456 Manage Files | Enter Building | Permission to enter building after hours. Signed document stored in Business Operations Office, 3rd floor. | 06/09/2021 - John Taverner | 06/15/2021 | 09/14/2021 | 09/15/2021 | Building 3 | edit \| remove archive \| Add Variation |
| Consent Approval No | Application Type | Description | Date of Consent | Commencement | Lapse Date | Renewal Date | Relevant Lot/DP | Actions |
| *123456 Manage Files* | *Enter Building* | *Permission to enter building after hours. Signed document stored in Business Operations Office, 3rd floor.* | *08/27/2021 - John Taverner* | *09/01/2021* | *11/30/2021* | *12/01/2021* | *Building 3* | *edit \| remove unarchive \| Add Variation* |

7. To unarchive the Consent/Approval, click **unarchive** in the Actions column for the Consent/Approval you want to unarchive.

# Deleting a Consent/Approval

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.

Consent Approvals

Show Archived: ☐

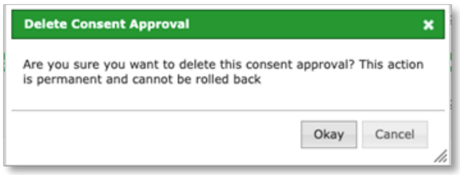
| Consent Approval No | Application Type | Description | Date of Consent | Commencement | Lapse Date | Renewal Date | Relevant Lot/DP | Actions |
|---|---|---|---|---|---|---|---|---|
| 123456 Manage Files | Enter Building | Permission to enter building after hours. Signed document stored in Business Operations Office, 3rd floor. | 06/09/2021 - John Taverner | 06/15/2021 | 09/14/2021 | 09/15/2021 | Building 3 | edit \| remove archive \| Add Variation |

Add Consent

4. Click the Consent/Approval tab.

5. Click **remove** in the Actions column for the Consent/Approval you want to delete.

6. Click **Okay** in the Delete Consent Approval pop-up to confirm you want to delete the Consent/Approval.

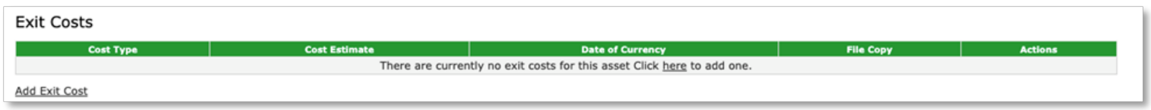


# Managing Exit Costs in the Asset Management Workspace

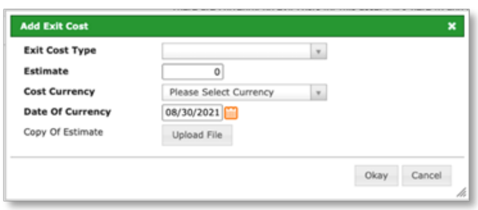
In the Asset Management Workspace, Exit Costs, which are costs related to ending a lease on time or early, can be recorded in the system.

# Adding an Exit Cost

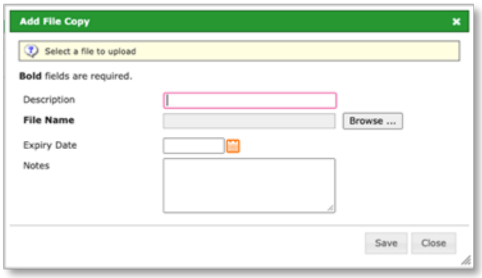
1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.




4. Click the Exit Costs tab.
5. Click **Add Exit Cost**.




6. From the Exit Cost Type drop-down, select the Exit Cost Type.
7. To add an Exit Cost, enter the label in the Exit Cost Type field and click the **Add and select?** link.
8. In the Estimates field, enter the monetary amount of the estimated Exit Cost.
9. From the Cost Currency drop-down, select the currency.
10. Click the Date of Currency field or the Calendar icon to display the calendar and select the date the estimate was valued.
11. To upload a file, click **Upload File**.
12. Enter a description of the file content in the Description field.




13. Click **Browse** and select the file you wish to upload.

14. To define an expiration date for the file, click in the Expiry Date field or click the Calendar icon to display the calendar and select the appropriate date.

15. Enter any relevant information in the Notes field.

16. Click **Save**.

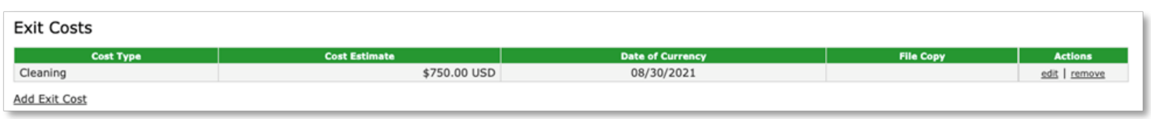
17. In the Add Extra Cost pop-up, click **Okay** to add the new Exit Cost.

# Editing an Exit Cost

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

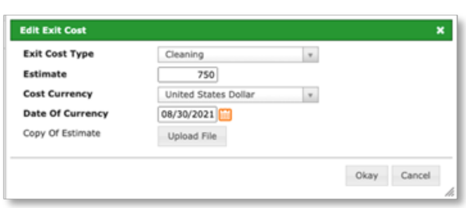
3. Select the Asset. The Summary tab for the Asset displays.




4. Click the Exit Costs tab.

5. Click **edit** for the Exit Cost you want to update.

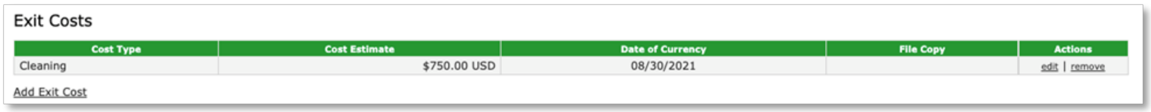
6. Update the fields as necessary in the Edit Exit Cost pop-up.




7. When all fields have been updated, click **Okay** to save the changes.

# Deleting an Exit Cost

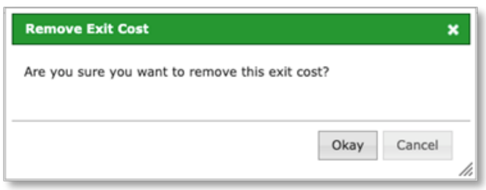
1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.


Exit Costs

| Cost Type | Cost Estimate | Date of Currency | File Copy | Actions |
|---|---|---|---|---|
| Cleaning | $750.00 USD | 08/30/2021 | | edit \| remove |

Add Exit Cost

4. Click the Exit Costs tab.
5. Click **remove** for the Exit Cost you want to delete.



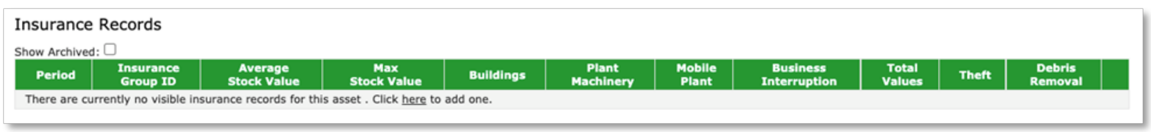

6. Click **Okay** to confirm you want to remove the Exit Cost.
7. The Exit Cost will be deleted from the Exit Costs tab.

# Maintaining Asset Insurance Records in the Asset Management Workspace

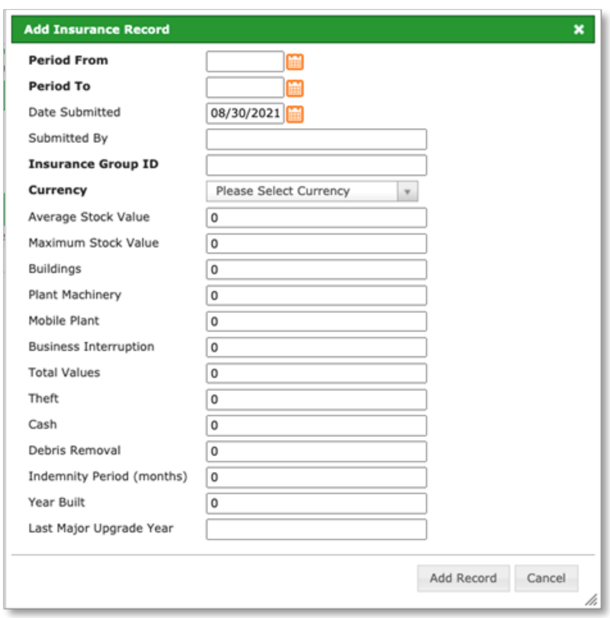
In the Asset Management Workspace, the Insurance Records tab allows you to record and track insurance policies for an Asset.

## Adding an Insurance Record

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.




4. Click the Insurance Record tab.
5. If this is the first record you are adding, use the **Click here** link.




6. Click the Period From and Period To fields or the Calendar icon to display the calendar and select the beginning and ending dates of the insurance coverage.
7. Click the Date Submitted field or the Calendar icon to display the calendar and select the date to record for submission.
8. Enter the person submitting the Insurance Record in the Submitted By field.

9. Enter the identifier for the insurance in the Insurance Group ID field.

10. From the Currency drop-down, select the currency for the coverage.

11. Enter the monetary value of insurance covers in each of the following fields as appropriate:
    a. Average Stock Value – average cost of inventory
    b. Maximum Stock Value – highest inventory value
    c. Buildings – buildings covered
    d. Plant Machinery – loss of or damage to the insured items, necessitating their repair or replacement
    e. Mobile Plant – equipment and machinery for raising or lowering a load
    f. Business Interruption – inability to conduct business
    g. Total Values – value of property, inventory, equipment, and business income covered
    h. Theft – losses from burglary, robbery, and other theft
    i. Cash – loss of cash
    j. Debris Removal – clean-up costs associated with damage to property

12. Enter the length of time the insurance company is obligated to make payments to cover the losses insured under the policy in the Indemnity Period (months) field.

13. Input the Year Built to indicate the year the asset was constructed or placed in service.

14. Input the Last Major Upgrade Year to indicate the year the last major improvement was made.

15. Click **Add Record**.

# Viewing an Insurance Record

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

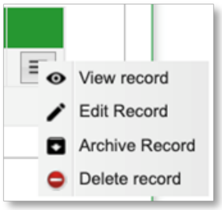
Insurance Records

Show Archived:

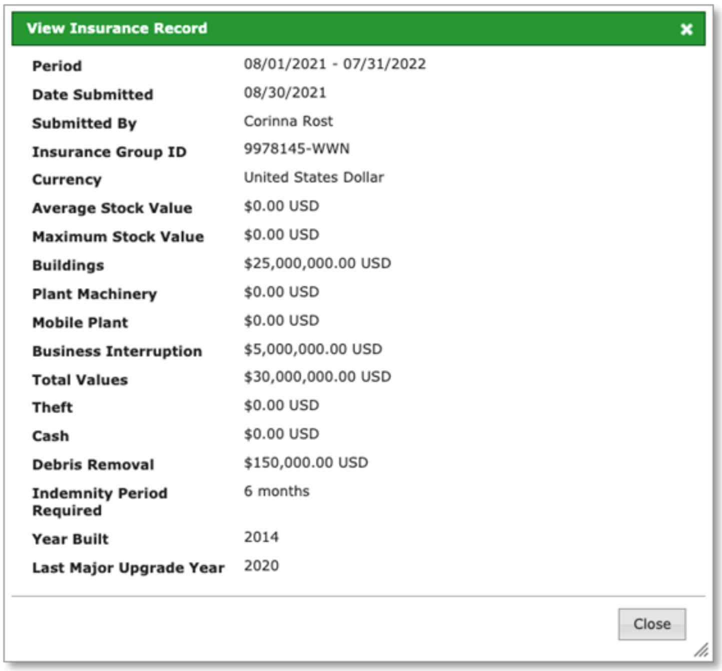
| Period | Insurance Group ID | Average Stock Value | Max Stock Value | Buildings | Plant Machinery | Mobile Plant | Business Interruption | Total Values | Theft | Debris Removal | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 08/01/2021 - 07/31/2022 | 9978145-WWN | $0.00 USD | $0.00 USD | $25,000,000.00 USD | $0.00 USD | $0.00 USD | $5,000,000.00 USD | $30,000,000.00 USD | $0.00 USD | $150,000.00 USD | |

Add Insurance Record

4. Click the Insurance Record tab.




5. Click the **hamburger** icon to the right of the record you want to view.




6. Select the option to **View record**.

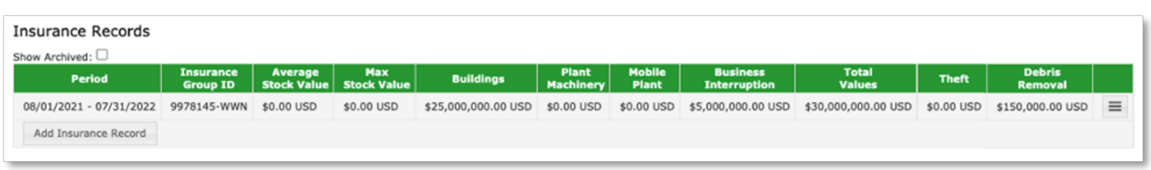
7. Click **Close** to return to the Insurance Records tab.

# Editing an Insurance Record

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

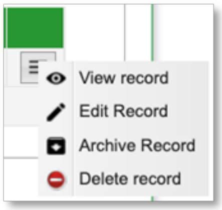

Insurance Records

Show Archived:

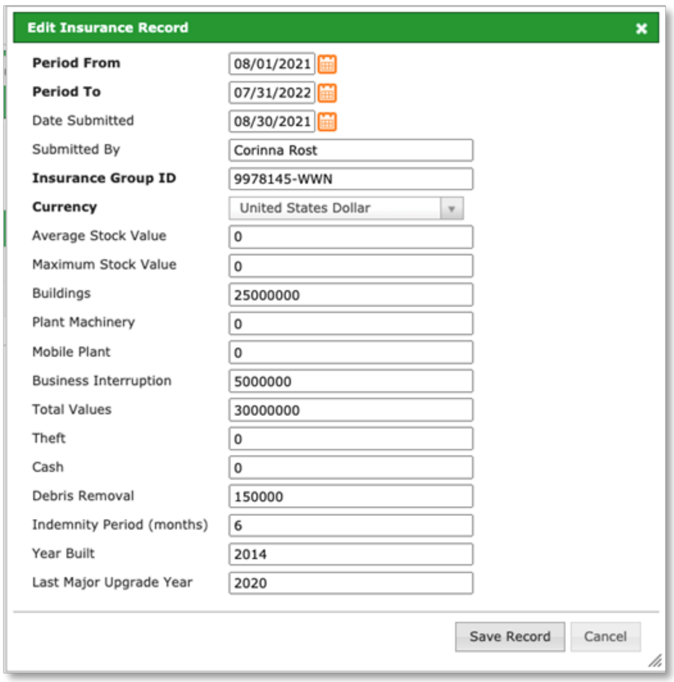
| Period | Insurance Group ID | Average Stock Value | Max Stock Value | Buildings | Plant Machinery | Mobile Plant | Business Interruption | Total Values | Theft | Debris Removal | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 08/01/2021 - 07/31/2022 | 9978145-WWN | $0.00 USD | $0.00 USD | $25,000,000.00 USD | $0.00 USD | $0.00 USD | $5,000,000.00 USD | $30,000,000.00 USD | $0.00 USD | $150,000.00 USD | |

Add Insurance Record

4. Click the Insurance Record tab.




5. Click the **hamburger** icon to the right of the record you want to edit.




6. Select the option to **Edit record**.

7. Edit the fields as necessary in the Edit Insurance Record pop-up.

8. Click **Save Record** when finished to save your changes.

# Archiving and Unarchiving an Insurance Record

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

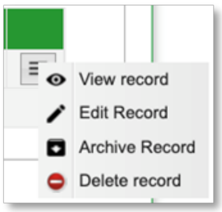
Insurance Records

Show Archived:

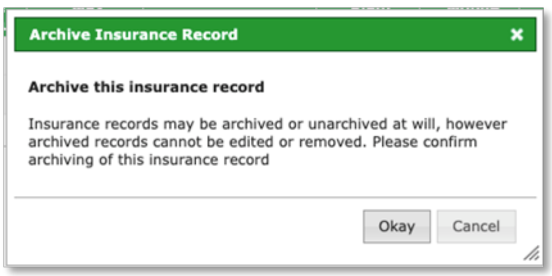
| Period | Insurance Group ID | Average Stock Value | Max Stock Value | Buildings | Plant Machinery | Mobile Plant | Business Interruption | Total Values | Theft | Debris Removal | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 08/01/2021 - 07/31/2022 | 9978145-WWN | $0.00 USD | $0.00 USD | $25,000,000.00 USD | $0.00 USD | $0.00 USD | $5,000,000.00 USD | $30,000,000.00 USD | $0.00 USD | $150,000.00 USD | |

Add Insurance Record

4. Click the Insurance Record tab.

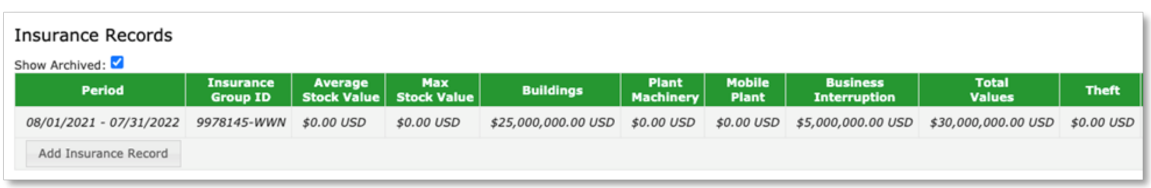



5. Click the **hamburger icon** to the right of the record you want to archive.




6. Select the option to Archive record.

7. Click **Okay**.



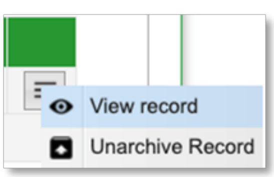
Insurance Records

Show Archived:

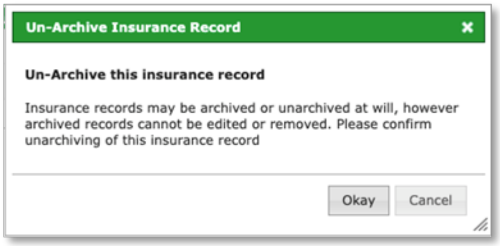
| Period | Insurance Group ID | Average Stock Value | Max Stock Value | Buildings | Plant Machinery | Mobile Plant | Business Interruption | Total Values | Theft |
|---|---|---|---|---|---|---|---|---|---|
| *08/01/2021 - 07/31/2022* | *9978145-WWN* | *$0.00 USD* | *$0.00 USD* | *$25,000,000.00 USD* | *$0.00 USD* | *$0.00 USD* | *$5,000,000.00 USD* | *$30,000,000.00 USD* | *$0.00 USD* |

Add Insurance Record

8. The archived record will appear in Italics if you check the box to **Show Archived**.



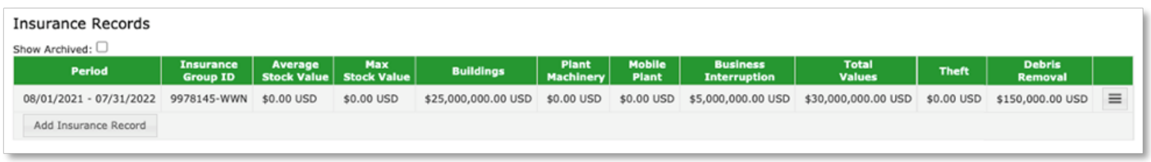

9. To Unarchive an Insurance Record, select the option to **Unarchive record** from the **hamburger** icon menu.




10. Click **Okay** in the pop-up to confirm you want to unarchive the record.

# Deleting an Insurance Record

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.



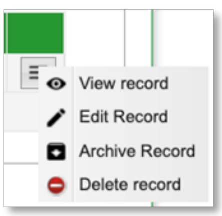
Insurance Records

Show Archived:

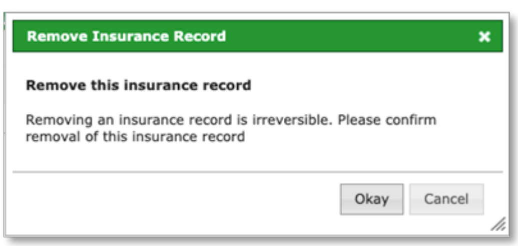
| Period | Insurance Group ID | Average Stock Value | Max Stock Value | Buildings | Plant Machinery | Mobile Plant | Business Interruption | Total Values | Theft | Debris Removal | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 08/01/2021 - 07/31/2022 | 9978145-WWN | $0.00 USD | $0.00 USD | $25,000,000.00 USD | $0.00 USD | $0.00 USD | $5,000,000.00 USD | $30,000,000.00 USD | $0.00 USD | $150,000.00 USD | |

Add Insurance Record

4. Click the Insurance Record tab.



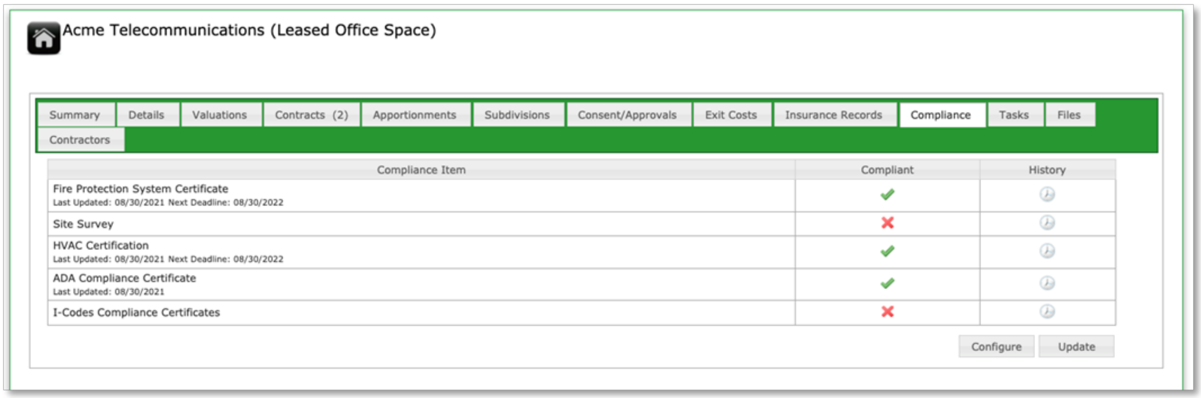

5. Click the **hamburger** icon to the right of the record you want to delete.




6. Select the option to **Delete record**.
7. Click **Okay**.

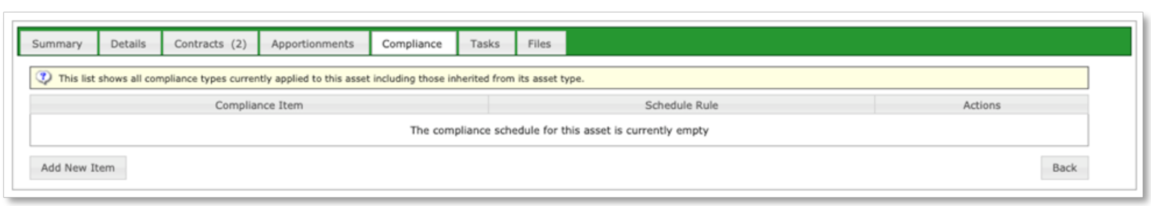
# Managing Compliance in the Asset Management Workspace

In the Asset Management Workspace, the Compliance tab tracks compliance activities. Compliance Items are defined for the Asset Type in the Administration workspace within the Asset Types tile. However, you can add additional Compliance Items and edit or delete the Compliance Items defined on the Compliance tab of each Asset. The Compliance tab lists each Compliance Item and identifies whether it is in compliance.

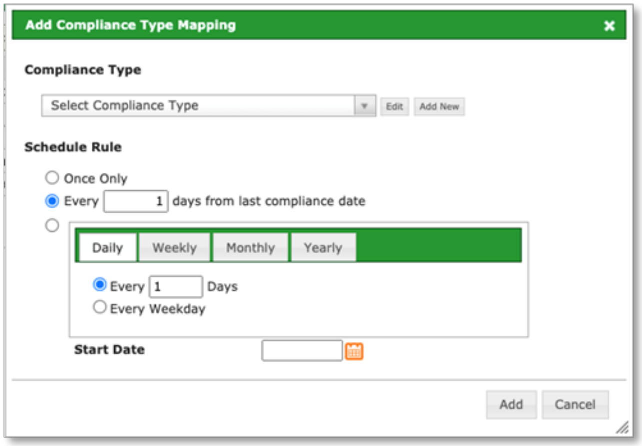



## Adding a Compliance Item

1. From the Top NavBar, select **Managemen**t and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.
4. Click the Compliance tab.
5. Click **Configure**.



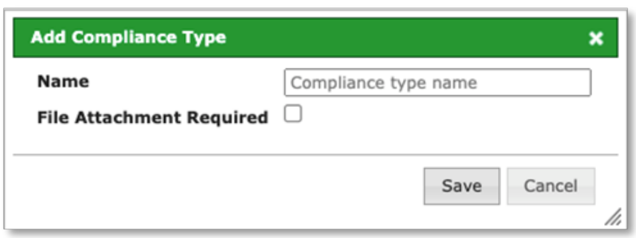

6. If this is the first Compliance Item you are adding, you won't see any other items listed. If you are simply adding an additional item, you'll see the current Compliance Items listed. Click **Add New Item**.




7. In the Add Compliance Type Mapping pop-up, start by selecting a Compliance Type from the drop-down.

8. If you are adding a new Compliance Type, go to Step 8, otherwise skip to Step 12.

9. To add a new Compliance Type, click **Add New** next to the Compliance Type drop-down.



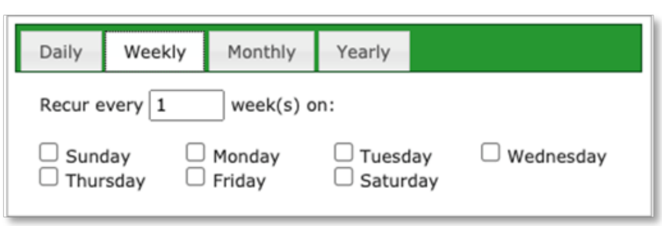

10. Enter a label for the new Compliance Type in the Name field.

11. If a document is required to be completed to fulfill the Compliance Item, click the **File Attachment Required** checkbox.

12. Click **Save** to save this new Compliance Type and it will now appear in the drop-down.

13. Define the schedule for the Compliance Item by indicating if it will be once only or follow a specific schedule.

14. To define a daily schedule either click the Every… Days radio button and indicate the number of days, or click the Every Weekday and indicate which weekday, Monday – Friday, as appropriate.



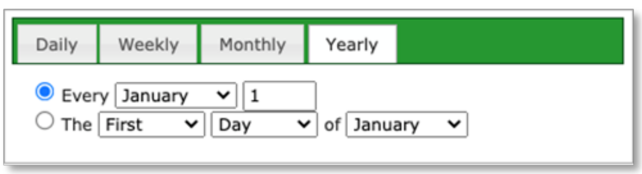
15. To define a weekly schedule, select the Weekly tab.

16. In the Recur Every…week(s) on field, enter the frequency of the weekly schedule. Or you may click the appropriate checkboxes for the day of the week on which the compliance action should occur.


17. To define a monthly schedule, select the Monthly tab.

18. Click the Day…of every…month(s) radio button to define a schedule that sets a specific date every number of months on which the compliance action should occur.

19. Or click The First Day of every…month(s) radio button to define a schedule that sets a specific date each month on which the compliance action should occur.




20. To define an annual schedule, select the Yearly tab.

21. Click the Every radio button and select the month from the drop-down and optionally enter a specific date to define a schedule that sets a specific month and day on which the compliance action should occur.

22. Or you may click the second radio button to define a schedule that allows you to set whether the compliance action should occur on the first, second, third, or fourth day or week in a specific month.

23. Regardless of which schedule you set up, you may indicate a start date by entering a date in the Start Date field or clicking the Calendar icon to select the start date.

24. Click **Save** to save the Compliance Item.

25. Click **Back** to return to the Compliance tab.

# Viewing a Compliance Item History

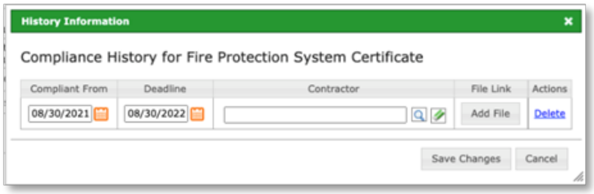
1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

4. Click the Compliance tab.

5. Click the **clock** icon for the Compliance Item which you want to view the history.




6. You can edit the history within the History Information pop-up. You may also add files or delete the history line item by clicking the **Delete** link to the right of the Compliance Item.

7. Click **Save Changes** if you've made any updates or **Cancel** if you have not changed anything, so return to the Compliance tab.

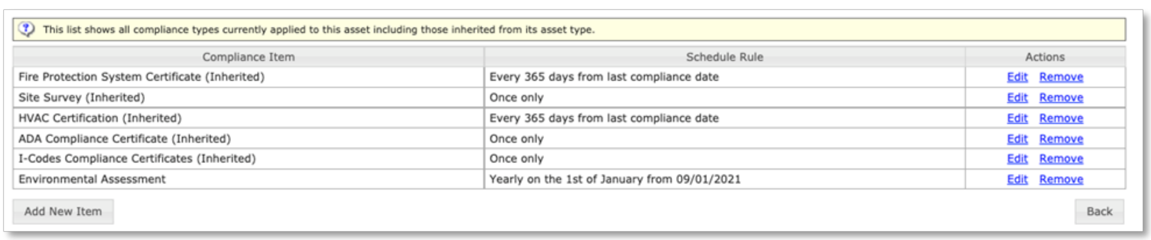
# Editing a Compliance Item

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

4. Click the Compliance tab.



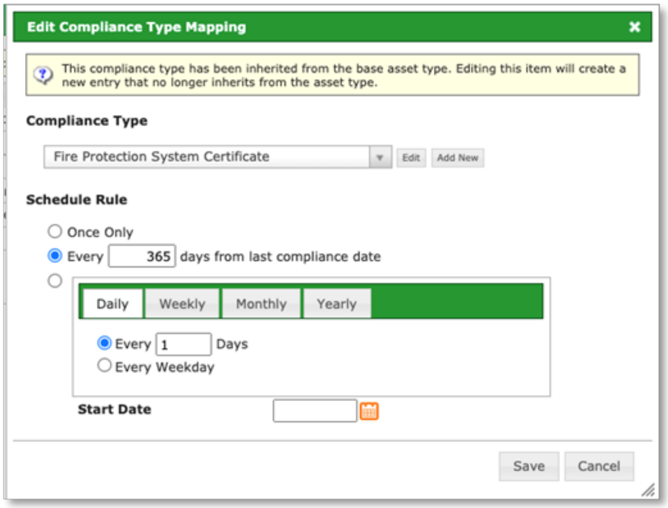
This list shows all compliance types currently applied to this asset including those inherited from its asset type.

| Compliance Item | Schedule Rule | Actions |
|---|---|---|
| Fire Protection System Certificate (Inherited) | Every 365 days from last compliance date | Edit Remove |
| Site Survey (Inherited) | Once only | Edit Remove |
| HVAC Certification (Inherited) | Every 365 days from last compliance date | Edit Remove |
| ADA Compliance Certificate (Inherited) | Once only | Edit Remove |
| I-Codes Compliance Certificates (Inherited) | Once only | Edit Remove |
| Environmental Assessment | Yearly on the 1st of January from 09/01/2021 | Edit Remove |

Add New Item Back

5. Click the **Configure** button to make the listing interactive.

6. Click the **Edit** link for the Compliance Item you want to edit.




7. Within the Edit Compliance Type Mapping pop-up, update fields as necessary.

> **Note:** If you edit a Compliance Type that was configured within the Administration workspace, in the Asset Types tile, any changes will create a new entry that no longer inherits attributes from the base asset type.

8. Click **Save**.

# Updating the Status of a Compliance Item

When a Compliance Item is not yet due, the schedule displays in the Schedule Rule column.

| Compliance Item | Schedule Rule |
|---|---|
| Fire Protection System Certificate (Inherited) | Every 365 days from last compliance date |
| Site Survey (Inherited) | Once only |
| HVAC Certification (Inherited) | Every 365 days from last compliance date |
| ADA Compliance Certificate (Inherited) | Once only |
| I-Codes Compliance Certificates (Inherited) | Once only |
| Environmental Assessment | Yearly on the 1st of January from 09/01/2021 |

When a Compliance Item is overdue, the Overdue icon displays in the Compliant column and when a Compliance Item is completed, the Completed icon displays.

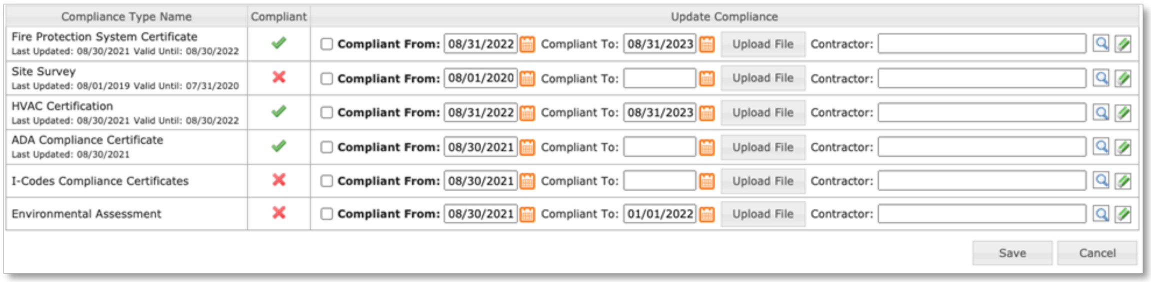
| Compliance Item | Compliant | History |
|---|---|---|
| Fire Protection System Certificate<br>Last Updated: 08/30/2021 Next Deadline: 08/30/2022 | ✔ | |
| Site Survey<br>Last Updated: 08/01/2019 Next Deadline: 07/31/2020 | ✘ | |
| HVAC Certification<br>Last Updated: 08/30/2021 Next Deadline: 08/30/2022 | ✔ | |
| ADA Compliance Certificate<br>Last Updated: 08/30/2021 | ✔ | |
| I-Codes Compliance Certificates | ✘ | |
| Environmental Assessment | ✘ | |

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

4. Click the Compliance tab.

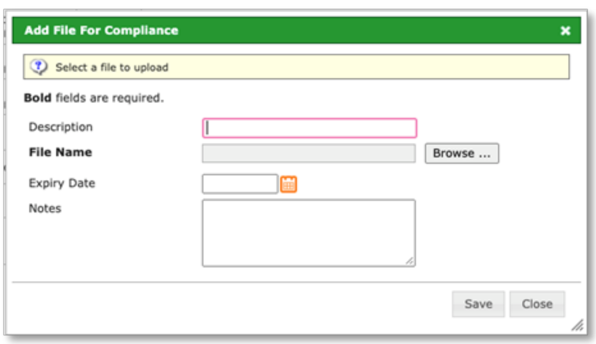



5. Click the **Update** button to make the listing interactive.

6. In the Update Compliance column, click the checkbox for the Compliance Item which you want to change the status.

7. In the Compliant From and Compliant To fields, click the Calendar icons and select the beginning and ending dates during which compliance requirements were met.

8. To upload a file, click **Upload File**.




9. Enter a description of the file content in the Description field.

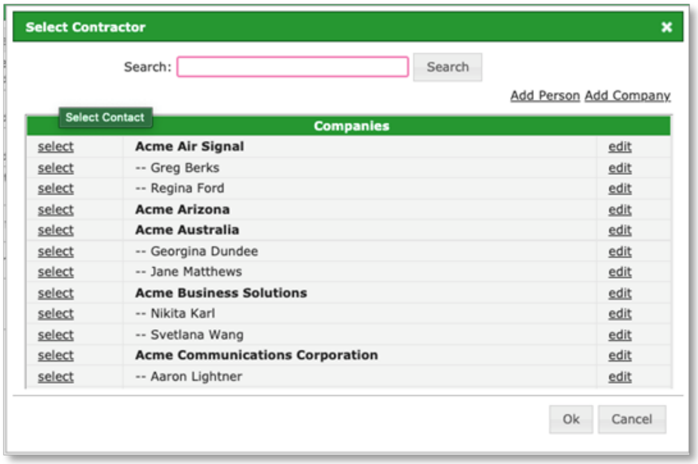
10. Click **Browse** and select the appropriate file.

11. To define an expiration date for the file, click in the Expiry Date field or click the Calendar icon to display the calendar and select the appropriate date.

12. Enter information about the file in the Notes field.

13. Click **Save**.

14. To record the Contractor that completed the Compliance Item, click the **magnifying glass** icon next to the Contractor field.




15. Click **Select** for the Contractor.

16. Click **Ok**.

17. Click **Save** and the status of the Compliance Item updates.

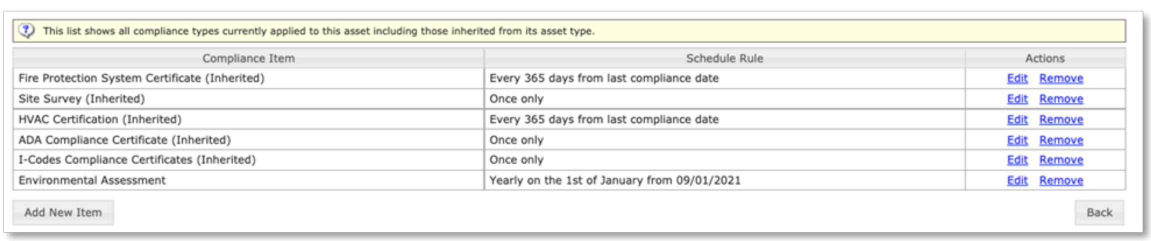
# Deleting a Compliance Item

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

4. Click the Compliance tab.




5. Click the **Configure** button to make the listing interactive.

6. Click the **Remove** link for the Compliance Item you want to delete. The Compliance Item will be deleted from the Asset.

# Managing Tasks in the Asset Management Workspace

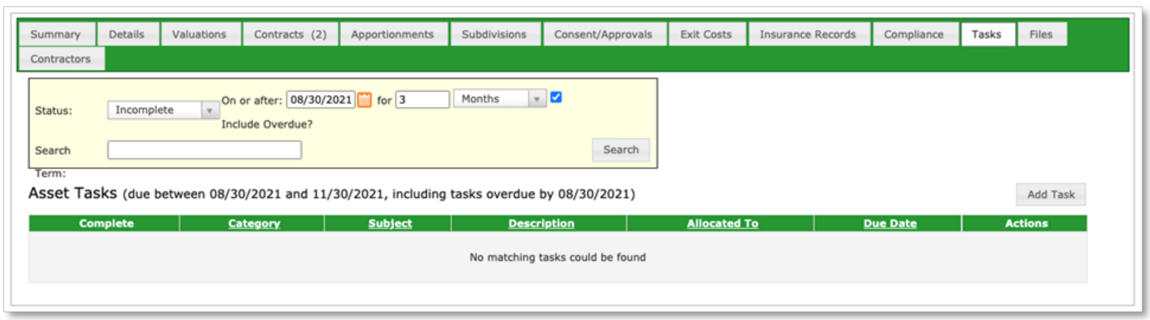
In the Asset Management Workspace, the Tasks tab within an Asset allows you to define Tasks, assign them to a specific person, and establish a schedule for them. It is within this workspace where all current, non-completed tasks are presented. It is here where you can add a new task, mark a current task complete, edit a current task, delete a current task, search for tasks, or reorder the task list. Tasks that have already been marked as complete can be accessed here as well.

## Adding a Task

1. From the Top NavBar, select **Management**, then select **Assets** to open the Asset workspace.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset for which you want to add a Task and click the Asset.

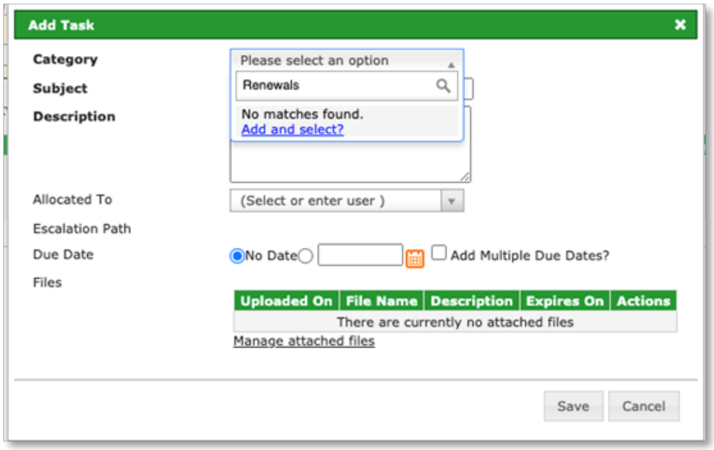
3. Click the Tasks tab.




4. Click **Add Task**.

5. From the Category drop-down, select the appropriate Category.

> **Note:** As you enter characters in the Category field, Categories that match the characters display.




6. To add a new Category, enter the label in the Category field and click the **Add and select?** link. The new category will be added.

7. Enter a label for the Tasks in the Subject field.

8. Enter information about the Task in the Description field.

9. From the Allocated To drop-down, select the person to whom you want to assign the task.

10. To add a new person, enter the name in the Allocated To field and click the **Add and select?** link. The person will be added.

> **Note:** The person you allocate a task to does not have to be a user. Entering staff responsible for tasks can be used by the asset manager for tracking purposes.

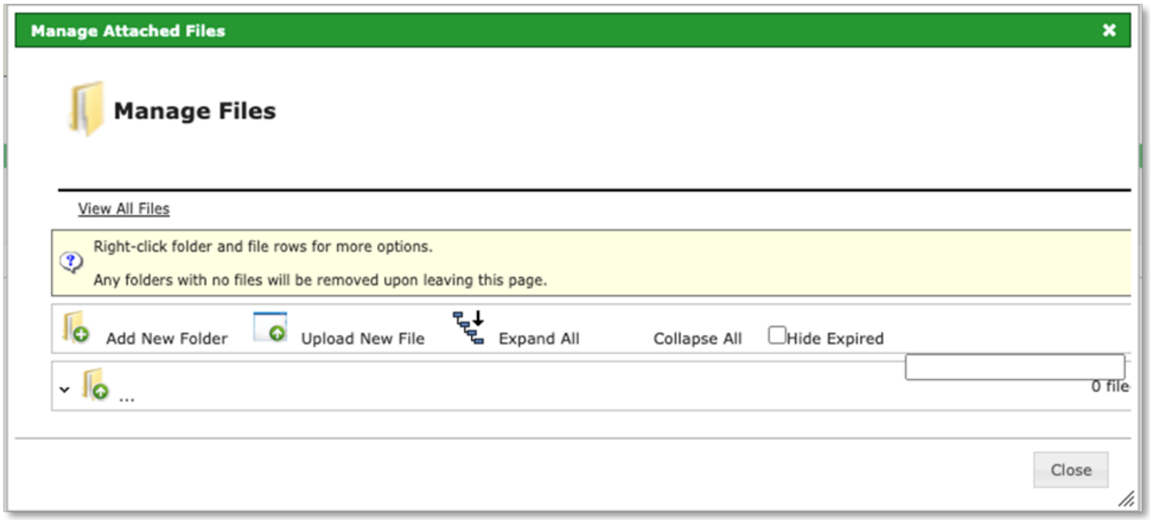
11. To define a Due Date for the tasks, select the appropriate option.

12. Select the No Date radio dial if no date is defined.

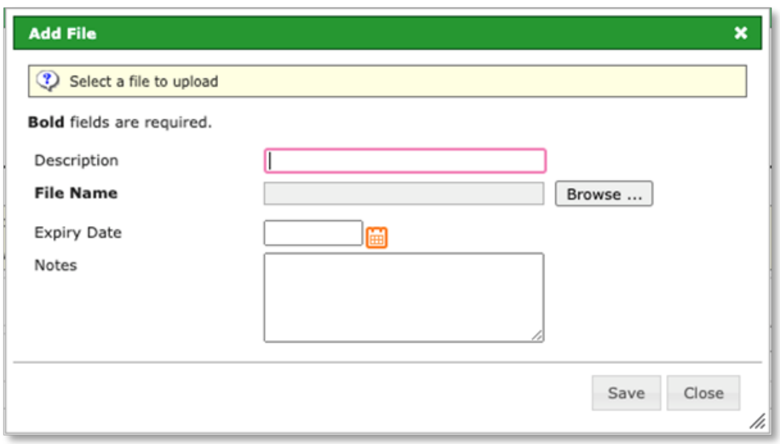
13. To define a single due date, click the blank field or the Calendar icon to display the calendar and select the appropriate date.

14. To define more than one due date, click the Add **Multiple Due Dates?** checkbox. To enter a start date, click in the blank field or use the Calendar icon to display the calendar and select the appropriate date.

15. To attach a document to the Task, click **Manage Attached files**.




16. Click **Upload New File**.




17. Populate the Description field.

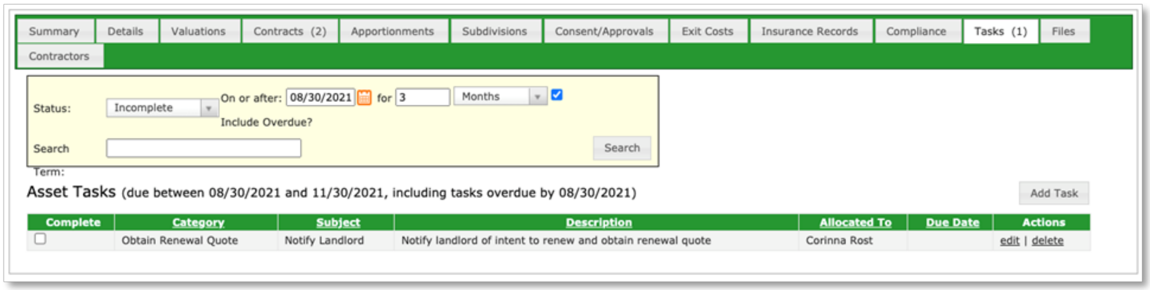
18. Click **Browse** and navigate to the location of the file you want to attach, select the file, and click **Open**. The file displays in the File Name field and message indicates that the upload is complete.

19. To define an expiration date for the file, click in the Expiry Date field or click the Calendar icon to display the Calendar and select the appropriate date.

20. Enter information about the file in the Notes field.

21. Click **Save**.

22. Click **Close** in the Manage Files pop-up.




23. Click **Save** to save the task and it will display.

# Searching for a Task

Real Estate Manager allows a user to search for a particular task by due date, status or subject.

1. From the Top NavBar, select **Management**, then select **Assets** to open the Asset workspace.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset for which you want to add a Task and click the Asset.

3. Click the Tasks tab.


4. To search by status, from the Status drop-down, select the status for the tasks you want to display.
   a. **Incomplete** – Task has not been marked completed as of the date entered in the On or after field.
   b. **Complete** – Task has been marked completed.
   c. **Overdue** – Task has not been marked completed and it is past the due date.
   d. **All** – All tasks display with all status values.

5. Click the On or after field or the Calendar icon to display the calendar and select the beginning date for the search.

6. In the going back field, enter the number of periods and select the period from the drop-down to set the range of dates to search from the beginning date.

> **Note:** To search Tasks, you must select a beginning date and length of time you want to include in the search.

7. To include tasks that are overdue in the search, click the Include Overdue? checkbox.

8. To limit the search results based on a set of characters, enter characters in the Search field.

9. After you have entered the appropriate search parameters, click **Search**. The tasks that meet the criteria display.

> **Note:** You can combine search methods, such as searching for Incomplete tasks with due dates in the next two weeks with the term “Inspection.”

# Reordering the Tasks

1. From the Top NavBar, select **Management**, then select **Assets** to open the Asset workspace.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset for which you want to add a Task and click the Asset.

3. Click the Tasks tab.

4. To order the tasks list:

   a. Click the Category, Subject, Description, Allocated To, or Due Date column headings to order them in ascending order.

   b. Click the same column heading again to reorder them in descending order.

Asset Tasks (pending and completed tasks due between 30/07/2021 and 31/07/2024, including tasks overdue by 30/07/2021) Add Task

| Complete | Category | Subject | Description | Allocated To | Due Date | Actions |
|---|---|---|---|---|---|---|
| ☐ | Inspections | Schedule Fire Marshall Inspection | Schedule annual inspection | Jorgan Fulmer | 01/04/2021 | edit \| delete |
| ☐ | Renewals | Landscape Contract | Renew the annual landscaping contract. | Corinna Rost | 01/01/2022 | edit \| delete |
| ☐ | Renewals | Notify Landlord | Send notification of intent to renew to Landlord. | Corinna Rost | 01/11/2023 | edit \| delete |

# Completing a Task

When a task is completed, you can change the status to Complete.

1. From the Top NavBar, select **Management**, then select **Assets** to open the Asset workspace.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset for which you want to add a Task and click the Asset.

3. Click the Tasks tab.

Asset Tasks (pending and completed tasks due between 30/07/2021 and 31/07/2024, including tasks overdue by 30/07/2021) Add Task

| Complete | Category | Subject | Description | Allocated To | Due Date | Actions |
|---|---|---|---|---|---|---|
| ☑ | Inspections | Schedule Fire Marshall Inspection | Schedule annual inspection | Jorgan Fulmer | 01/04/2021 | edit \| delete |
| ☐ | Renewals | Landscape Contract | Renew the annual landscaping contract. | Corinna Rost | 01/01/2022 | edit \| delete |
| ☐ | Renewals | Notify Landlord | Send notification of intent to renew to Landlord. | Corinna Rost | 01/11/2023 | edit \| delete |

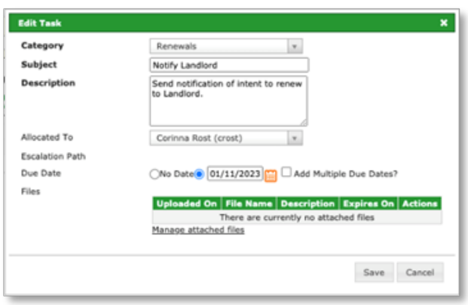
4. To change the status of a task to Complete, click the checkbox in the Complete column for the appropriate task(s).

**Note:** If you need to change the status back to Incomplete, display the task and uncheck the Complete checkbox.

# Editing a Task

After you add a task, you can continue to maintain information about the task.

1. From the Top NavBar, select **Management**, then select **Assets** to open the Asset workspace.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset for which you want to add a Task and click the Asset.
3. Click the Tasks tab.
4. Click the **edit** link for the task you want to edit.




5. Edit the appropriate fields as necessary.
6. Click **Save** to update the task.

# Deleting a Task

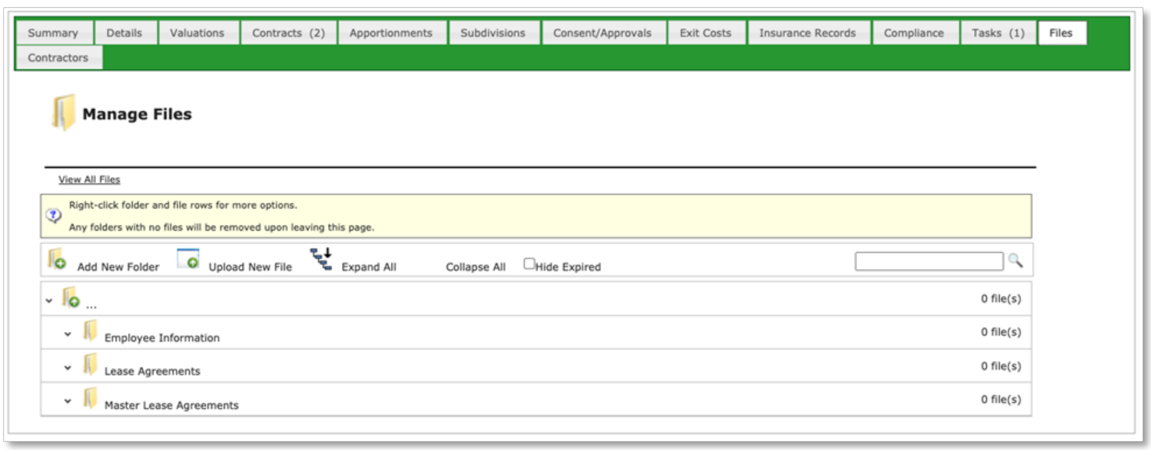
1. From the Top NavBar, select **Management**, then select **Assets** to open the Asset workspace.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset for which you want to add a Task and click the Asset.
3. Click the Tasks tab.
4. Click the **delete** link for the task you want to delete.
5. Click **Okay** in the confirmation box. The task is deleted.

# Managing Files and Folders in the Asset Management Workspace

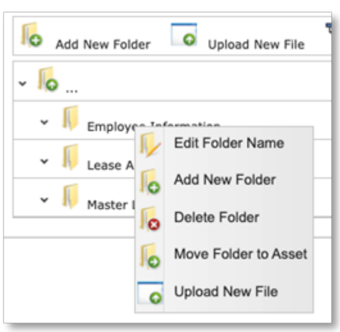
In the Asset Management Workspace, the Files tab is used to save documents not saved on other tabs, such as the Tasks tab. The Files tab contains the File Structure you defined for the Asset Type in the Administration workspace within the Asset Types tile. However, you can add additional folders or delete folders for a specific Asset.

## Adding a New Folder

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.




4. Click the Files tab.
5. To add a new folder at the top level of the tree, click **Add New Folder**.

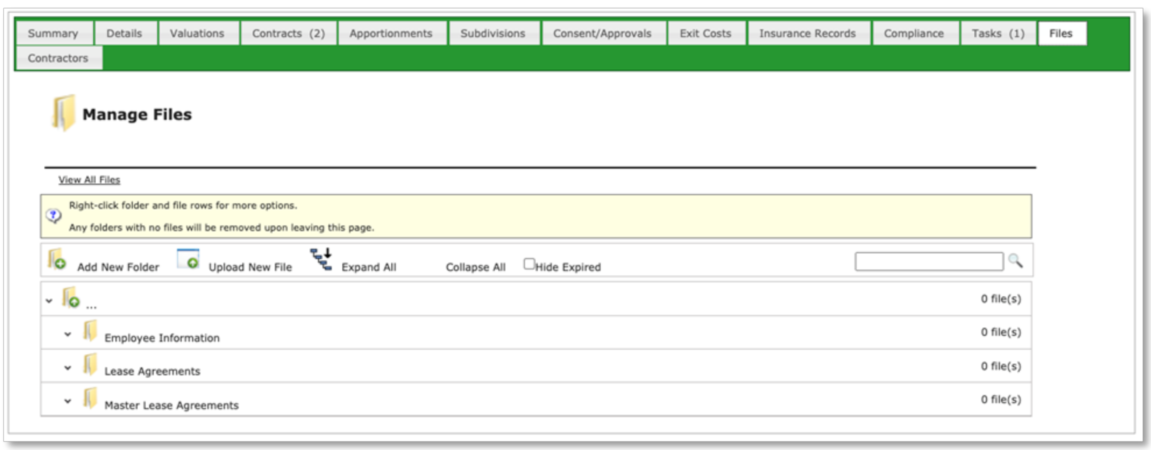



6. To add a subfolder, right-click the folder under which you want to add a folder and select **Add New Folder** from the menu.

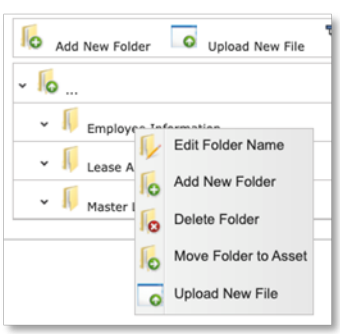

7. From the **Add New Folder** pop-up, enter the folder label in the New Folder Name field.
8. Click **Save**.

# Renaming a Folder Name

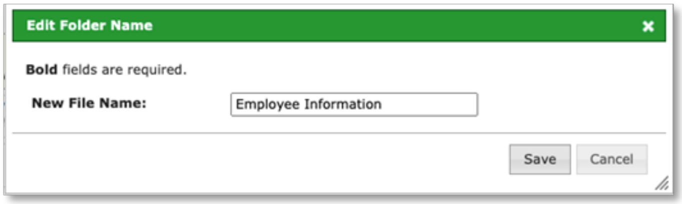
1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.




4. Click the Files tab.




5. To edit the name of a folder, right-click on the folder and select **Edit Folder Name** from the menu.




6. Edit the folder name as necessary.

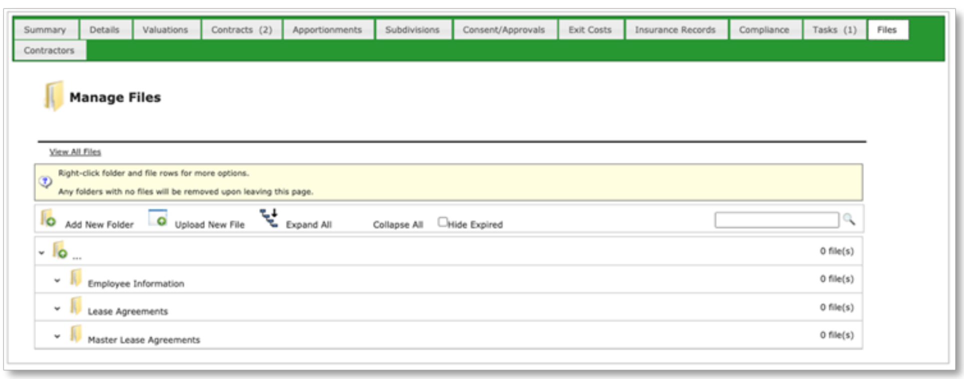
7. Click **Save**.

# Deleting a Folder

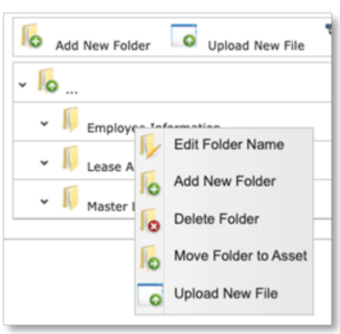
1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.




4. Click the Files tab.




5. To delete a folder, right-click on the folder and select **Delete Folder** from the menu.

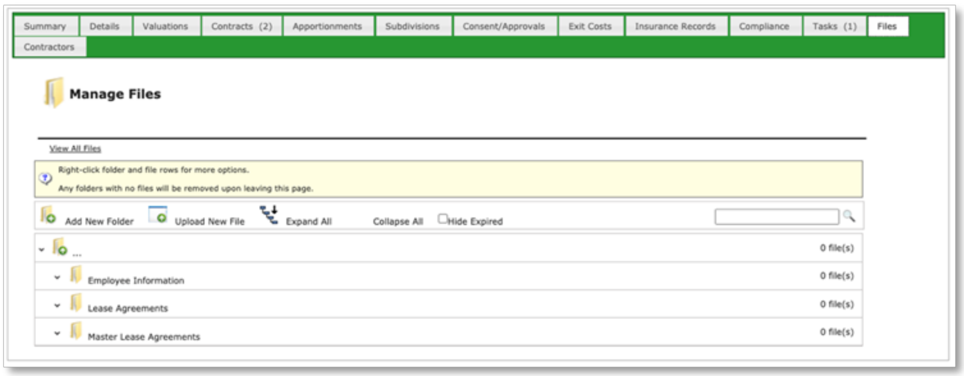
> **Note:** When a folder is deleted, all subfolders are also deleted.

# Uploading a File to a Folder

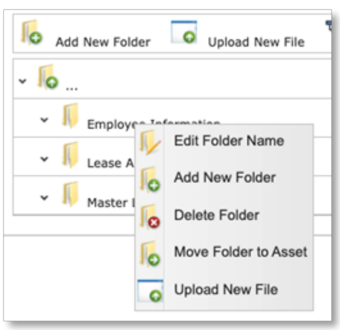
1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

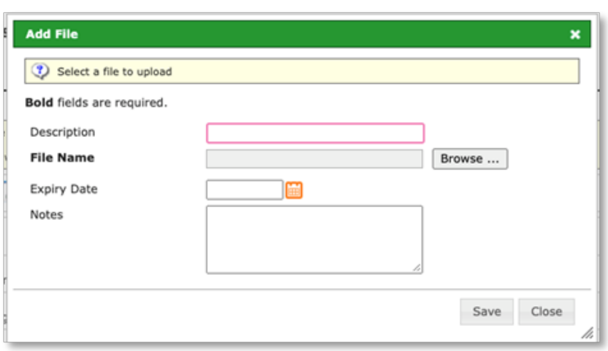
3. Select the Asset. The Summary tab for the Asset displays.




4. Click the Files tab.




5. To upload a file, right-click on the folder and select **Upload New File** from the menu.




6. In the Description field, enter information about the file.

7. Click **Browse** and find the file you wish to upload.

8. To set an expiration date for the file, click the Expiry Date field or the Calendar icon and select the date on which the file expires.

9. In the Notes field, enter any additional information about the file.

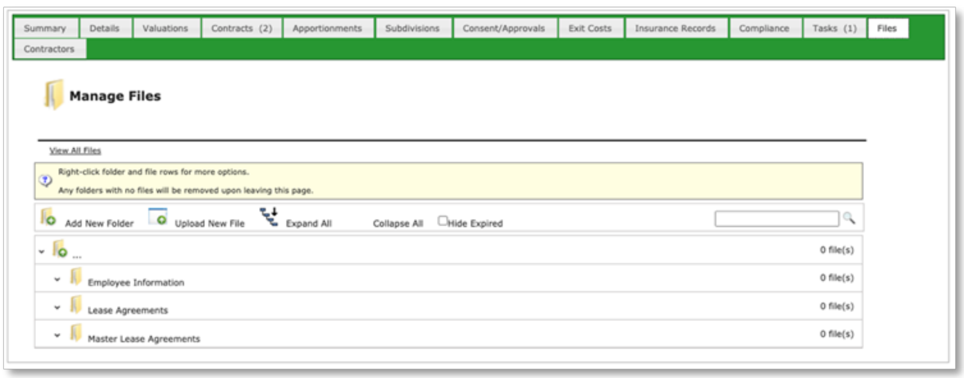
10. Click **Save** and the file will upload.

# Moving a File to Another Asset

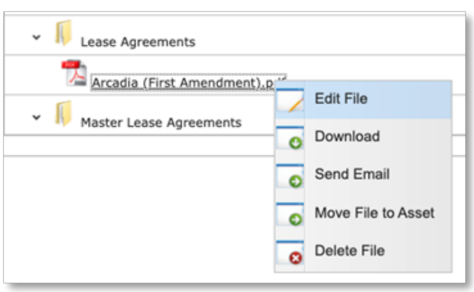
1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

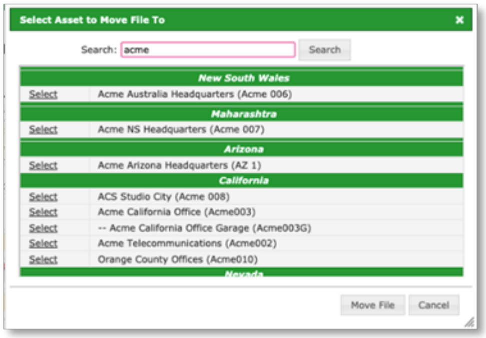
3. Select the Asset. The Summary tab for the Asset displays.




4. Click the Files tab.




5. To move a file, right-click on the file and select **Move File to Asset** from the menu.




6. To view all Assets, click **Search**, or to search for a single Asset, enter characters for the Asset name in the Search field and click **Search**.

7. Click **Select** for the Asset to which you want to move the file.

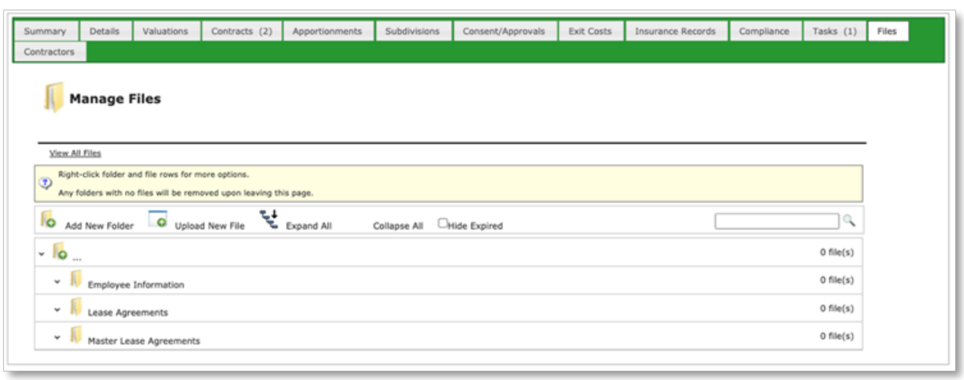
8. Click **Move File.** The file is moved to the Folder tab on the selected Asset and is no longer available on the Asset from which it was moved.

# Deleting a File

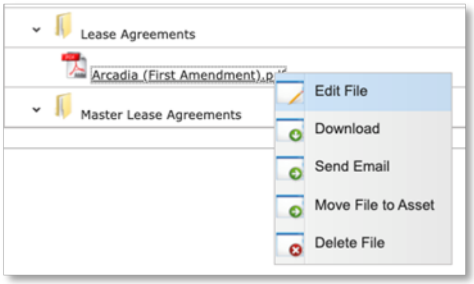
1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

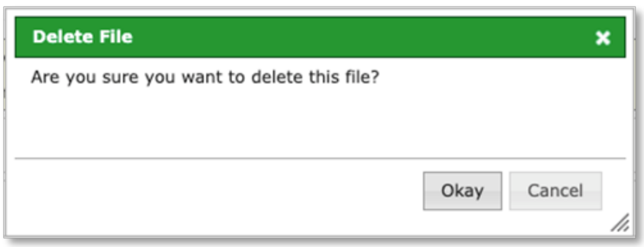
3. Select the Asset. The Summary tab for the Asset displays.




4. Click the Files tab.




5. To delete a file, right-click on the file and select **Delete File** from the menu.




6. Click **Okay** in the confirmation pop-up and your file will be deleted.

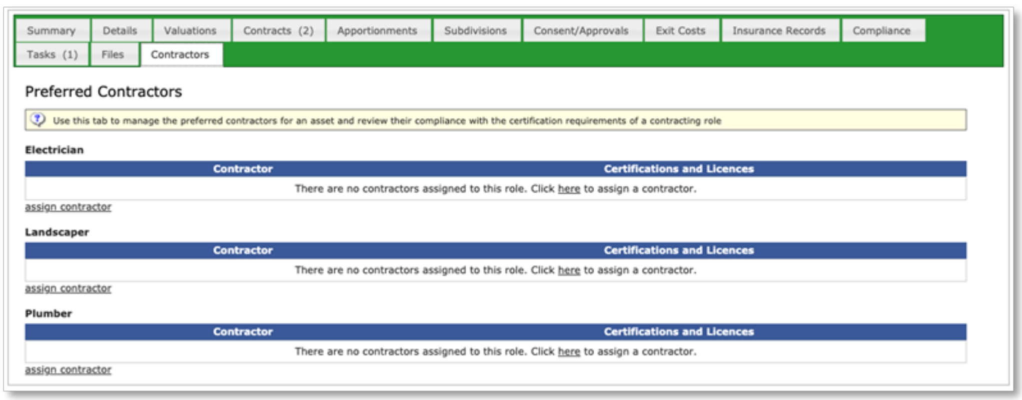
# Managing Contractors in the Asset Management Workspace

In the Asset Management Workspace, the Contractors tab maintains a list of preferred Contractors for an Asset. The Certifications and Contractor Roles are defined in the Administration workspace within the Contracting tile. The Contractors can be defined in the Contact Register and available for assignment to an Asset. The Contracting Roles cannot be edited from the Contractors tab.

# Adding a Contractor to an Asset

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

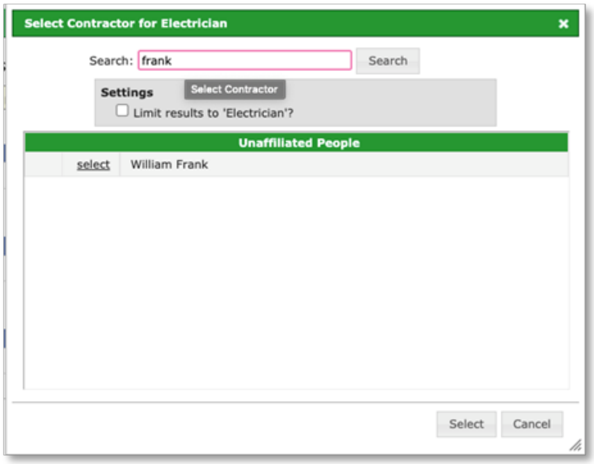



3. Select the Asset. The Summary tab for the Asset displays.

4. Click the Contractors tab.

> **Note:** The Contractor Roles defined in the Administration workspace within the Contracting tile display for assignment of Contractors. You cannot add a Contractor Role form the Asset Contractors Tab.

5. For the Contractor Role that you want to assign a Contractor, click **assign contractor**.




6. To search Contacts by name, enter characters in the Search field. To list all Contractors assigned to the Contracting Role, click the Limit results to Contracting Role checkbox.

7. Click **Search**.

8. Click **Select** next to the desired Contact.

9. Click **Select** and the Contact will appear as a Contractor.

# Deleting a Contractor from an Asset

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

3. Select the Asset. The Summary tab for the Asset displays.

4. Click the Contractors tab.


5. Click **remove** for the Contractor you want to remove from the Asset.

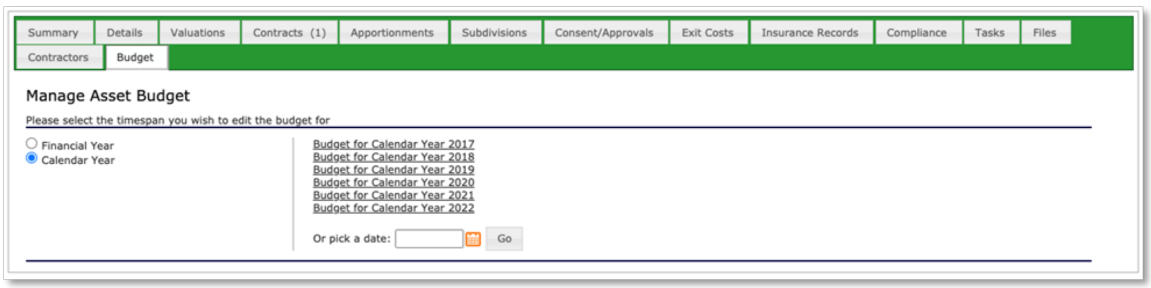
6. The Contractor is removed from the Asset.

# Maintaining Asset Budgets in the Asset Management Workspace

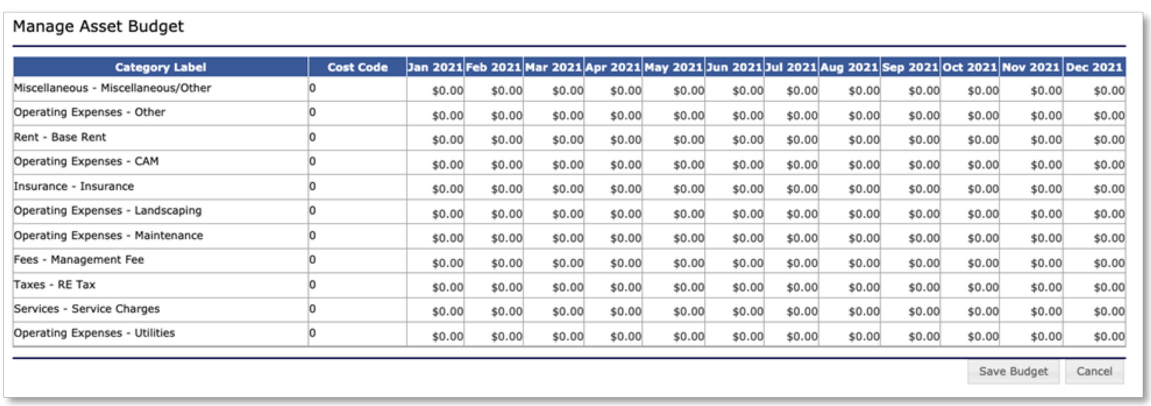
In the Asset Management Workspace, the Budget tab allows you to create a budget for an Asset that can be used for reporting and budgeting purposes.

## Adding a Budget for an Asset

1. From the Top NavBar, select **Management** and then **Assets**.
2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.
3. Select the Asset. The Summary tab for the Asset displays.




4. Click the Budget tab.
5. Click the radio button for the timespan for the budget.
   a. **Financial year** – the budget covers the year that does not align with a calendar year
   b. **Calendar year** – the budget covers the year beginning Jan 1 and ending Dec 31
6. Or you can use the Or pick a date field and specify a date you want the budget to begin.



Manage Asset Budget

| Category Label | Cost Code | Jan 2021 | Feb 2021 | Mar 2021 | Apr 2021 | May 2021 | Jun 2021 | Jul 2021 | Aug 2021 | Sep 2021 | Oct 2021 | Nov 2021 | Dec 2021 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Miscellaneous - Miscellaneous/Other | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Operating Expenses - Other | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Rent - Base Rent | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Operating Expenses - CAM | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Insurance - Insurance | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Operating Expenses - Landscaping | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Operating Expenses - Maintenance | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Fees - Management Fee | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Taxes - RE Tax | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Services - Service Charges | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Operating Expenses - Utilities | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |

Save Budget Cancel

7. Enter the budget for each Cost Category and month.


8. You may use the **Copy Field** icon to copy the value to the remaining months in the row.

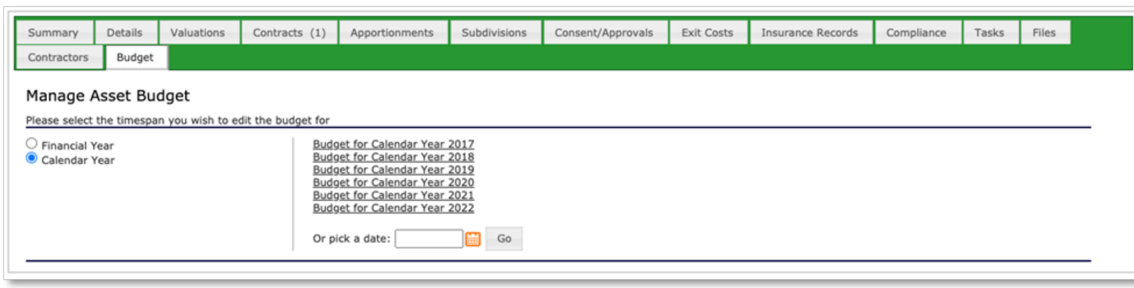
9. Click **Save Budget** when all values have been entered.

# Editing a Budget for an Asset

1. From the Top NavBar, select **Management** and then **Assets**.

2. In the Action Panel, click the **Expand Tree** icon to display the Asset you want to view.

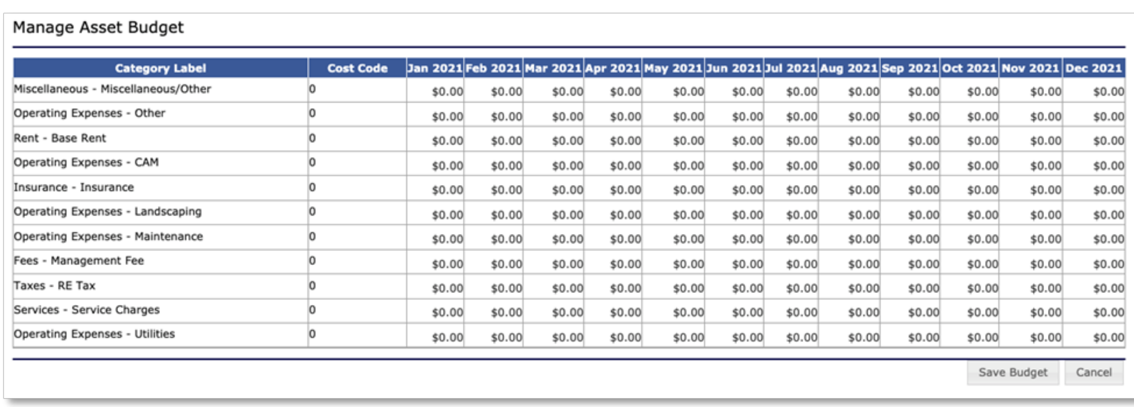
3. Select the Asset. The Summary tab for the Asset displays.




4. Click the Budget tab.

5. Click the radio button for the budget you want to edit.
   a. **Financial year** – the budget covers the year that does not align with a calendar year
   b. **Calendar year** – the budget covers the year beginning Jan 1 and ending Dec 31

6. Click the budget period you want to edit.


Manage Asset Budget

| Category Label | Cost Code | Jan 2021 | Feb 2021 | Mar 2021 | Apr 2021 | May 2021 | Jun 2021 | Jul 2021 | Aug 2021 | Sep 2021 | Oct 2021 | Nov 2021 | Dec 2021 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Miscellaneous - Miscellaneous/Other | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Operating Expenses - Other | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Rent - Base Rent | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Operating Expenses - CAM | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Insurance - Insurance | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Operating Expenses - Landscaping | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Operating Expenses - Maintenance | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Fees - Management Fee | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Taxes - RE Tax | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Services - Service Charges | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Operating Expenses - Utilities | 0 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |

Save Budget Cancel

7. Edit the values as necessary.

8. Click **Save Budget** when all values have been updated/added.

# Version Summary

| Version | Changes/Updates | Date |
|---|---|---|
| 21R3 | Guide created. Asset Management workspace broken out from larger guide. Included making changes to Asset. | 08/30/2021 |
| 23R3 | Removed all reference to REM. | 08/03/2023 |