Home Dashboard User Guide

Real Estate Manager

Version 26.2.1

Document Information

Notices

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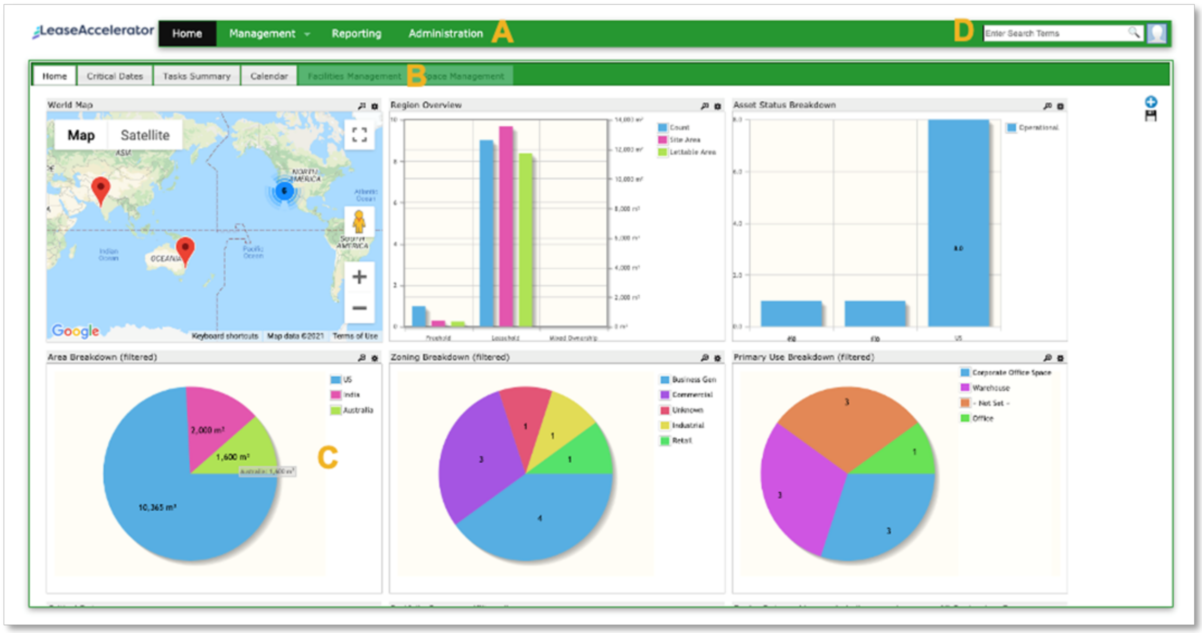
Disclaimer

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

Home Dashboard

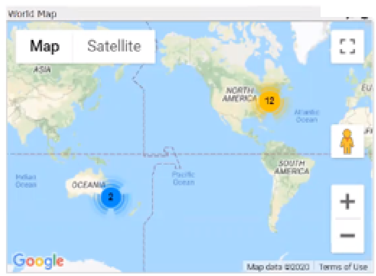
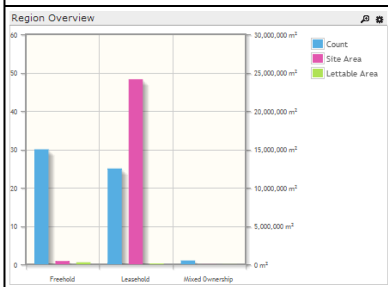
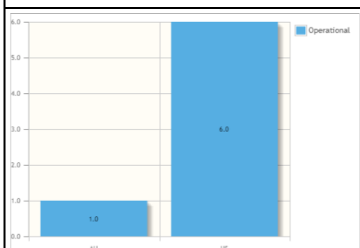
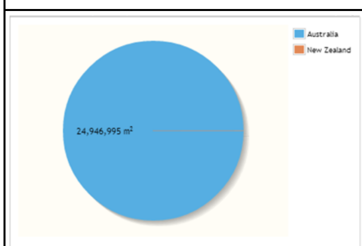
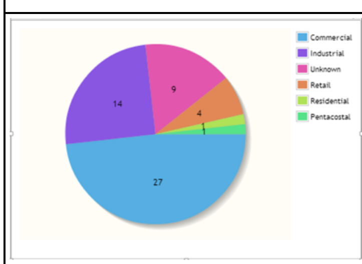
The Dashboard immediately displays when you log in to Real Estate Manager. From the Dashboard, you can quickly access portfolio information via a series of Portlets, and access all system functions via the Top NavBar. The figure below shows the Dashboard and its components.

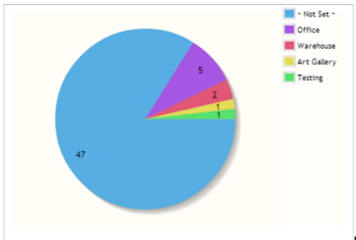
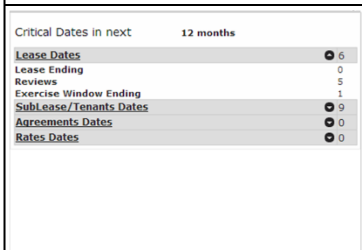
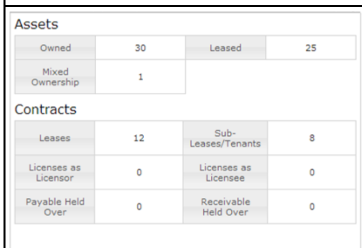
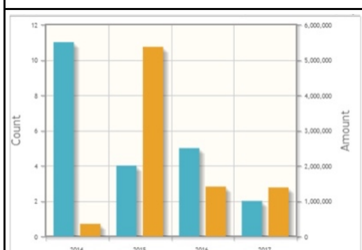
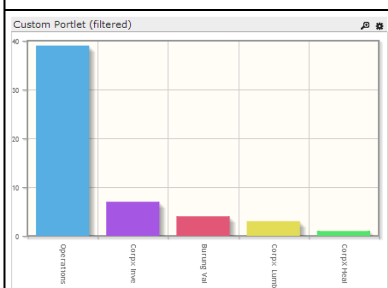


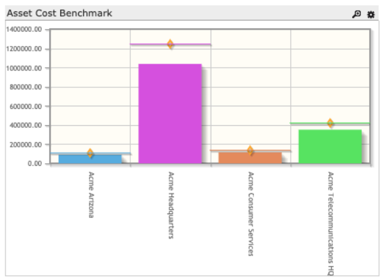
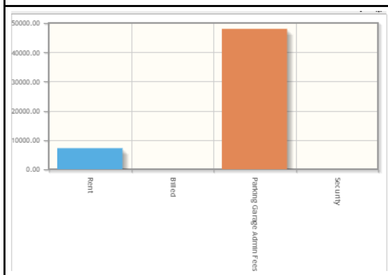
Reference	Dashboard Component	Description
A	Top NavBar	Menu at the top of the Home workspace that allows you to access the workspaces within Real Estate Manager: Home, Management, Reporting, and Administration. All system functions are available from the different workspaces. The Top NavBar is always visible.
B	Tabs	Tabs are defined within each workspace and provide access to functions within the workspace.
C	Portlet	The Dashboard consists of a set of graphical interfaces (“Portlets”) that allow you to view information about your portfolio. The system is pre-configured with a default set of Portlets. You can also define additional Portlets.
D	Search	The Search function allows you to search from all workspaces.

Portlets

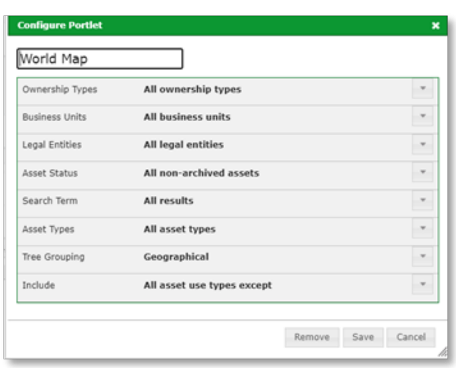
The standard set of Portlet types are described in the table below.

Portlet	Portlet Type	Description
	World Map	Displays a map that identifies locations of properties defined in Real Estate Manager and allows you to drill down to the Summary tab in the Asset Management workspace that contains data associated with an asset.
	Region Overview	Provides a bar graph view of asset count, site area, and lettable area for the entire portfolio.
	Asset Status Breakdown	Provides a bar graph breakdown of Asset Status grouped by country.
	Area Breakdown	Provides a pie chart showing area totals by country.
	Zoning Breakdown	Provides a pie chart showing an asset count for each zoning type.

Portlet	Portlet Type	Description
	Primary Use Breakdown	Provides a pie chart showing an asset count for each primary use.
	Critical Dates	Snapshot of the number of critical dates that upcoming in the time period you set. Use the Expand Down and Collapse Up icons to view specific Critical Dates.
	Portfolio Summary	Provides a count of Assets and Contracts.
	Expiry Dates	Provides a bar graph showing Contract numbers and value totals by year.
	Custom Field Portlet	Permits you to create a chart-based portlet based on a selection of filters.

Portlet	Portlet Type	Description
	Asset Cost Benchmark	A breakdown of asset cost based on a selection of filters that includes Currency, Asset Type, Business Unit, etc.
	Contract Cost Benchmark	Provdes a bar graph of Contract costs by Cost Category.

Viewing Information on a Portlet

Function	Description
Expand View	Click the **Magnifying Glass** icon. The expanded map displays in a pop-up that shows the assets (properties) currently defined in Real Estate Manager.
Full Screen	To view the Map as a full browser page, click the **Full Screen** icon. The Map displays as the full browser page.
Exit Full Screen	To reduce the Map from a full browser page, click the **Exit Full Screen** icon or press **<ESC>**.
View Asset Information	▪ Click the **Asset** icon in the Map Portlet to open the Summary tab for the Asset. ▪ Click the **Multiple Assets** icon to display a list of Assets in the location and click the Asset you want to view to open the Summary tab for the Asset.
View Configuration Options	On the Map portlet, click the **Gear** icon. The Configure Portlet dialog-box opens and allows you to select data for inclusion, remove data, or search for data to display on the Map portlet. 

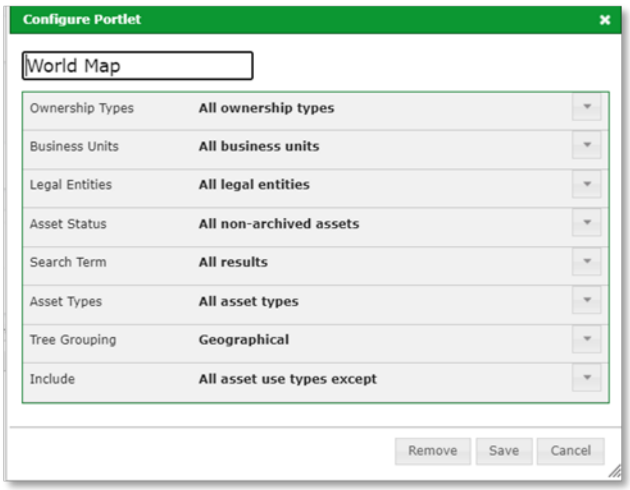
Configuring and Editing a Portlet

Each Portlet Type has a unique set of parameters to filter the data in Real Estate Manager. Any Portlet can be edited by using the configuration function.

To configure a Portlet:

1. From the Top NavBar, select **Home** and the Dashboard will appear.

2. On the Portlet, click the **Gear** icon. In the pop-up you are able to select data for inclusion, remove data, or search for data to display on the Portlet.



3. From the appropriate drop-down, select the data you want to configure for display on the Portlet.

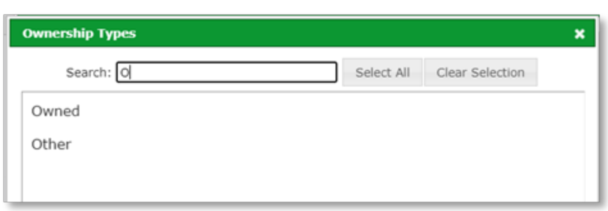
4. Press **<CTRL>** and select multiple data items

5. Click the **Expand** link to open a pop-up that allows you to display more data items.

6. Click **Select All** to select all data items.

7. Click **Clear Selection** to deselect all data items.

8. To search for a data item, enter one or more alpha/numeric characters in the Search field. Data items that meet the search criteria automatically display as you enter the characters.



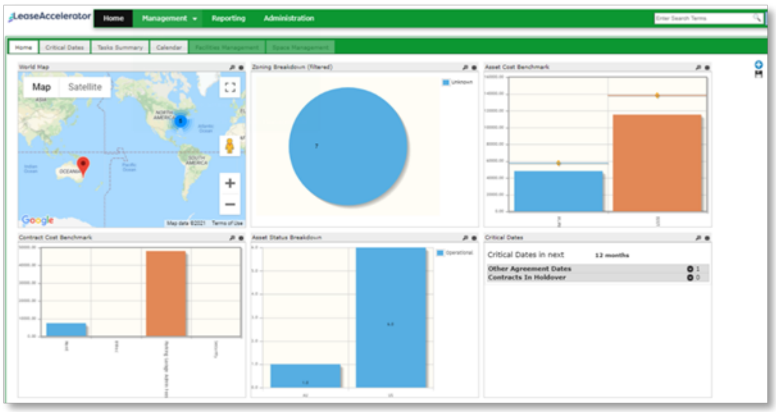
9. Click **Save** to update the Portlet configuration.

Moving a Portlet to a New Location on the Dashboard

Portlets can be arranged in any order on the Dashboard.

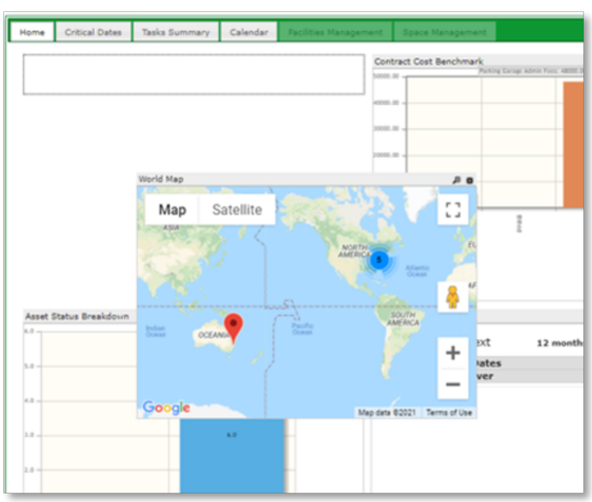
To move a Portlet:

1. From the Top NavBar, select **Home** and the Dashboard will appear.



2. Hover over the Portlet name at the top of the Portlet you want to move. The Drag-and-drop icon displays.

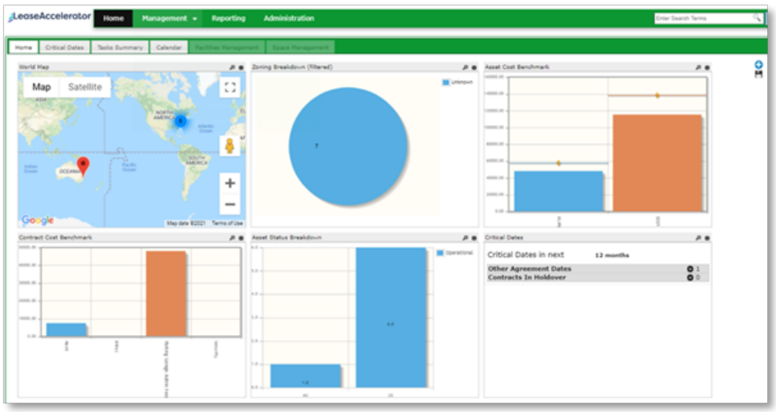
3. Click the **Drag-and-drop** icon and move the Portlet to the location where you want to place it.



4. Click the **Save** icon to save the Portlet layout.

Adding a Portlet

1. From the Top NavBar, select **Home** and the Dashboard appears.



2. Click the **Plus** icon. The Add New Portlet pop-up opens.

3. In the Portlet Caption field, enter a label for the Portlet.

4. From the Portlet Type drop-down, select the format of the Portlet.

> **Note:** See the Portlet section for information about each type of Portlet.

5. Click **Save**.

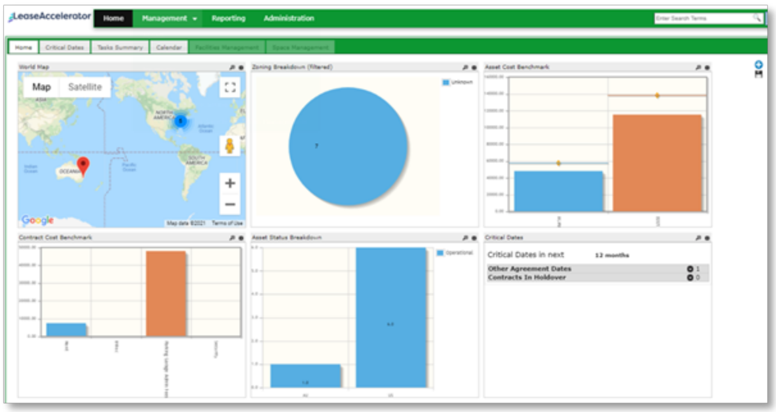
6. The new Portlet displays on the Dashboard and can be configured.

> **Note:** New Portlets display with the default configurations set for each Portlet Type that generally present all information.

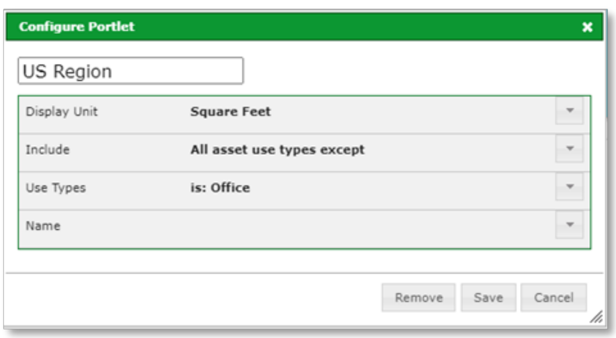
7. Click the **Save** icon to save the Portlet layout.

Deleting a Portlet

1. From the Top NavBar, select **Home** and the Dashboard appears.



2. Click the **Gear** icon for the Portlet you want to delete.

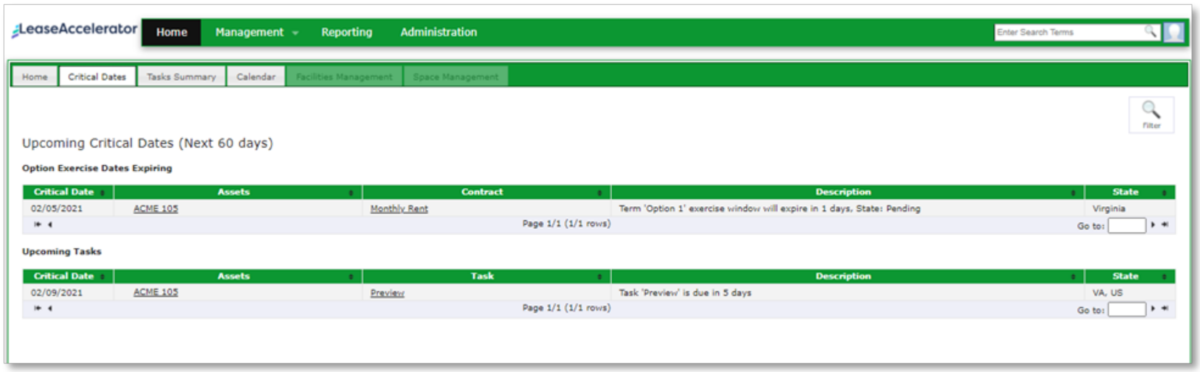


3. Click **Remove**. The Portlet is deleted.

4. Click the **Save** icon to save the Portlet layout.

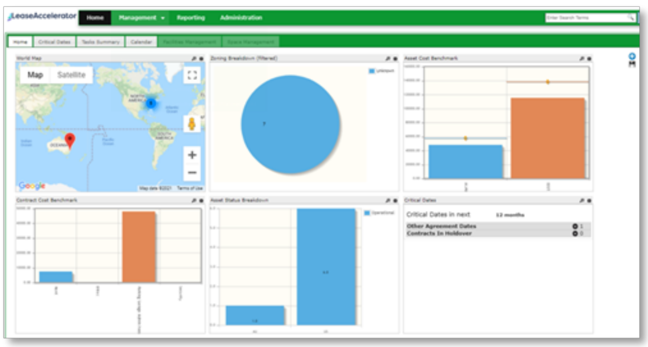
Critical Dates Tab

The Critical Dates tab lists upcoming Critical Dates related to Assets, including Contract terms and Reviews, Compliance Items, Tasks, and Consent Approvals defined. Critical Dates cannot be added on the Critical Dates tab. However, the Contract driving the Critical Dates can be accessed from the Critical Dates tab.

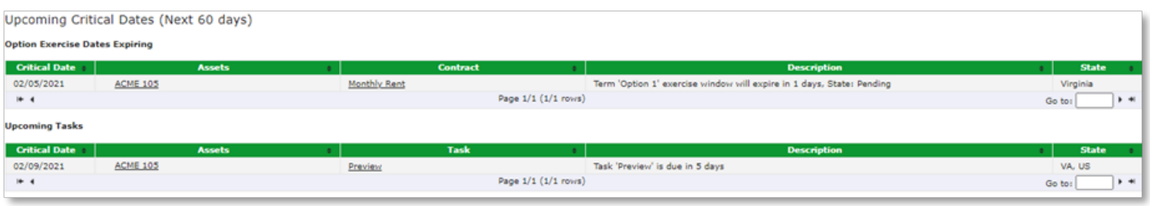


Accessing and Filtering the Critical Dates Tab

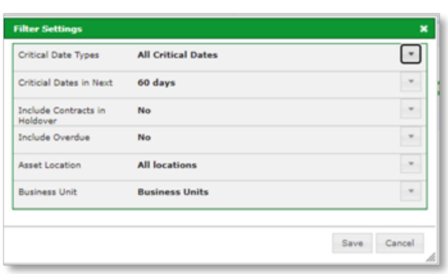
1. From the Top NavBar, select Home and the Dashboard appears.



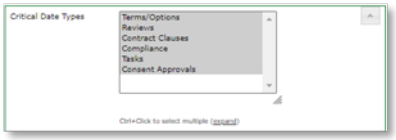
2. Click the **Critical Dates** tab.



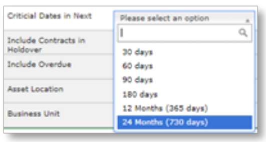
3. To filter Critical Tasks displaying, click the **Filter** icon.



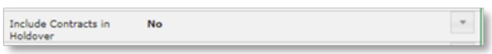
4. From the Critical Date Types drop-down, select the items for which you want to display Critical Dates.



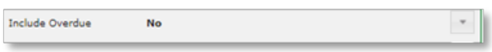
5. From the Critical Dates in Next drop-down, select the time frame for which you want to display Critical Dates due.



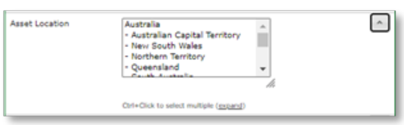
6. Click the **Include Contracts in Holdover** drop-down and check or uncheck the box to include.



7. Click the **Include Overdue** drop-down and check or uncheck the box to include.



8. From the Asset Location drop-down, select the location(s) of Assets for which you want to display Critical Dates.



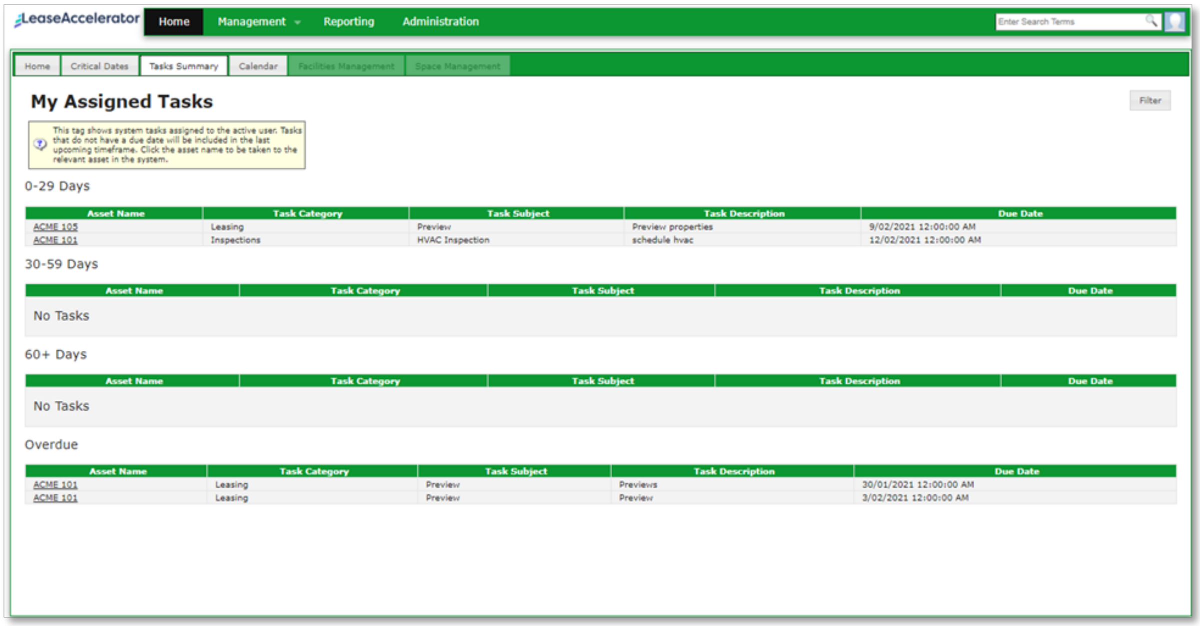
9. From the Business Unit drop-down, select the Business Unit(s) for which you want to display Critical Tasks.

10. Click **Save**.

11. To access the Asset for which a Critical Date is displayed, click the **Asset**.

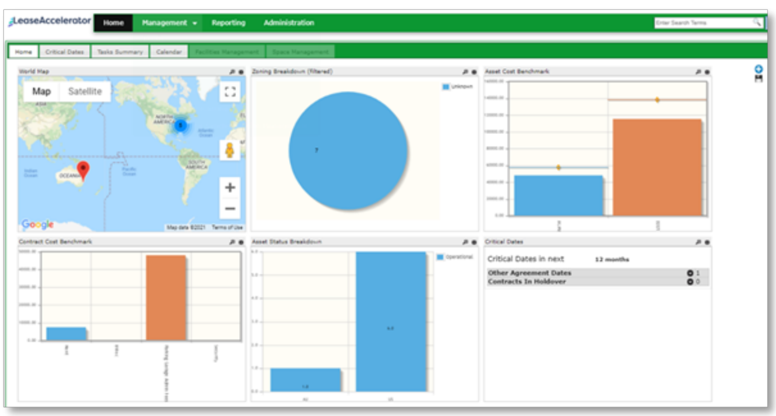
Tasks Summary Tab

The Tasks Summary tab lists Tasks assigned to the user logged in. It does not show all Tasks due or overdue for all users.



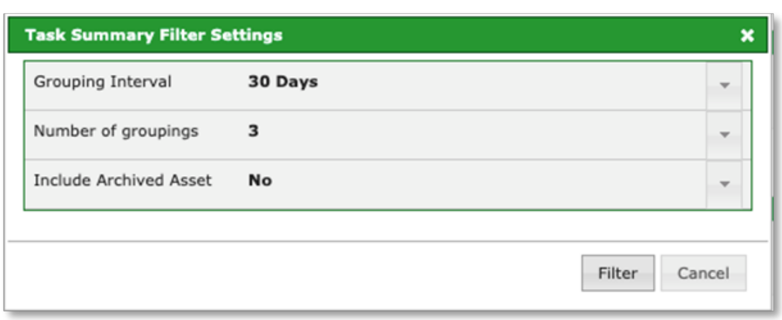
Accessing and Filtering Tasks

1. From the Top NavBar, select **Home** and the Dashboard appears.

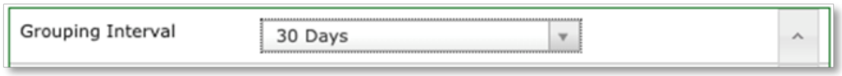


2. Click the **Tasks Summary** tab. The Tasks assigned to you display.

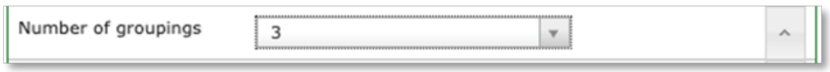
3. To filter Tasks displaying, click the **Filter** button. The Filter Settings pop-up opens.



4. From the Grouping Interval drop-down, select the time frame in which to display the Tasks.



5. From the Number of Groupings drop-down, select the number of groups to display.

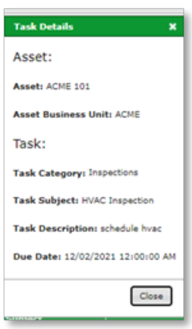


6. From the Include Archived Asset drop-down, check or uncheck the box to include.

7. Click **Filter** to save your changes.

8. To view information about Tasks, click the Asset Name for the Tasks you want to view.

9. Click **Close** to return to the Tasks Summary tab.



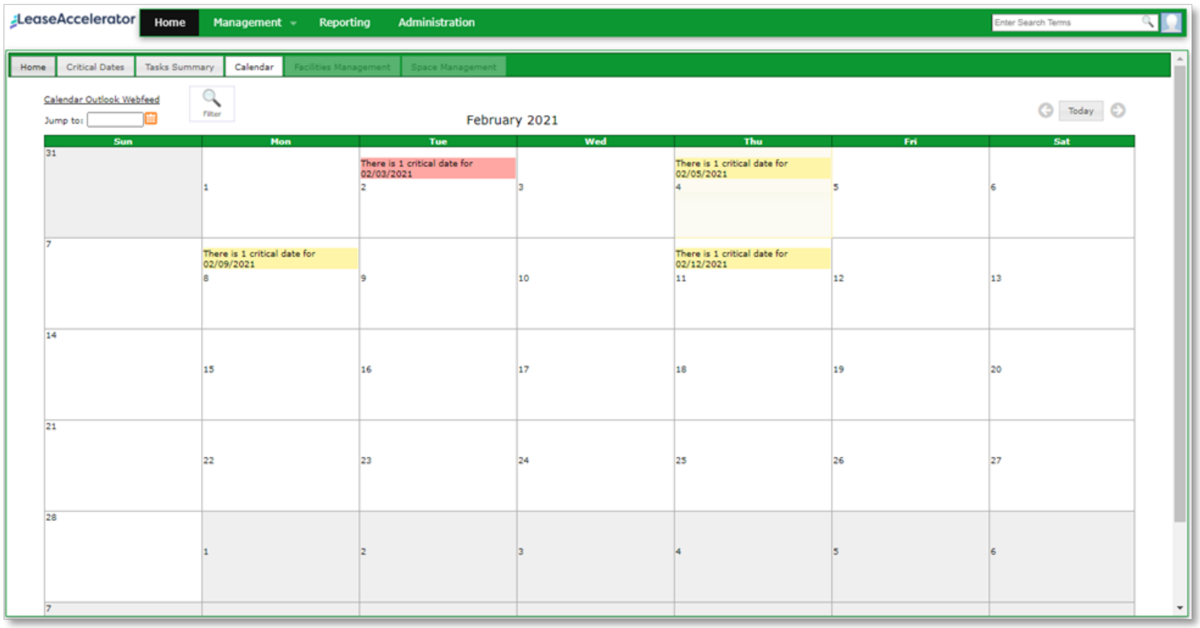
10. To view Critical Tasks due on a specific date, double-click the date on the Calendar.

11. To display the previous month, click the **Back** icon.

12. To display the following month, click the **Forward** icon.

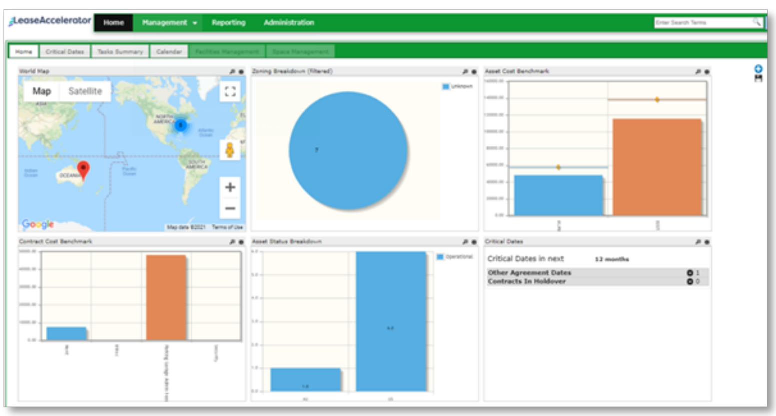
Calendar Tab

The Calendar tab lists Critical Dates on a monthly Calendar that you can link to your Outlook Calendar.



Accessing and Filtering the Calendar

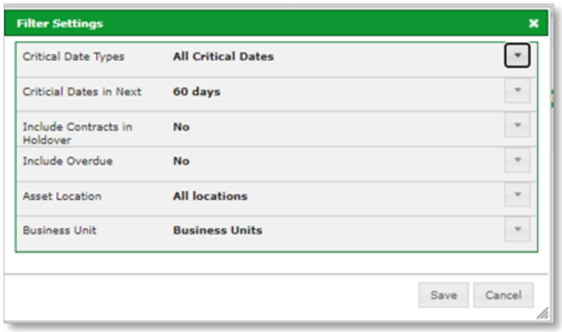
1. From the Top NavBar, select **Home** and the Dashboard appears.



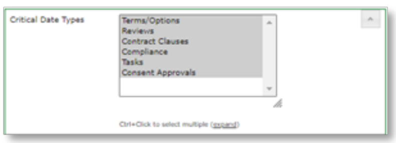
2. Click the **Calendar** tab. The Critical Dates display on a Calendar.

> **Note:** A Critical Date displays one day before it is due on the Calendar.

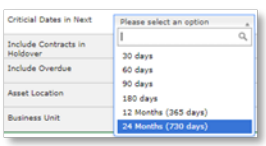
3. To filter Critical Dates displaying, click the **Filter** icon. The Filter Settings pop-up opens.



4. From the Critical Date Types drop-down, select the items for which you want to display Critical Dates.

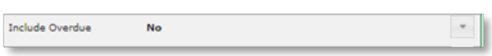


5. From the Critical Dates in Next drop-down, select the time frame for which you want to display Critical Dates due.

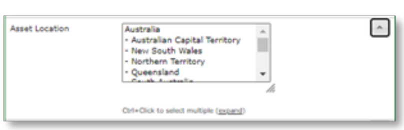


6. Click the **Include Contracts in Holdover** drop-down and check or uncheck the box to include.

7. Click the **Include Overdue** drop-down and check or uncheck the box to include.



8. From the Asset Location drop-down, select the location(s) of Assets for which you want to display Critical Dates.



9. From the Business Unit drop-down, select the Business Unit(s) for which you want to display Critical Tasks.

10. Click **Save**. The filtered Critical Dates display.

11. To view information about a Task, click the Asset Name for the Tasks you want to view. The Tasks Details pop-up opens.

12. Click **Close** to return to the Summary Tasks tab.

13. To navigate to other months:

    a. 

    Click the **Back** icon to view a prior month.

    b. Click the **Forward** icon to view the following month.

    c. Click **Today** to display the current month.

    d. 

    To display a specific date, click the **Calendar** icon next to the Jump to field and select the data you want to display.

14. To link the Real Estate Manager Calendar with your Outlook Calendar, click **Calendar Outlook Webfeed**. The Alerts.ics file downloads.

User Profiles

The Real Estate Manager allows the users to effectively navigate and utilize the platform's features like managing their profiles, accessing jobs, and configure settings with ease.

Under the **My Profile** tab, users can view the following options:

- **Logged-in user name:** The username of the logged-in user.
- **Change Password:** Securely update the user’s log-in credentials.
- **Access My Jobs:** View and manage current jobs.
- **Manage Settings:** Customize personal and system preferences for a tailored experience.
- **About:** Gain insights on the version number, client and username.
- **Logout:** Safely exit the platform to protect user data and privacy.

Manage Settings

The user can manage the following profile settings:

- Date and Time Format
- Calendar Feed Notifications
- Email and Job Subscriptions

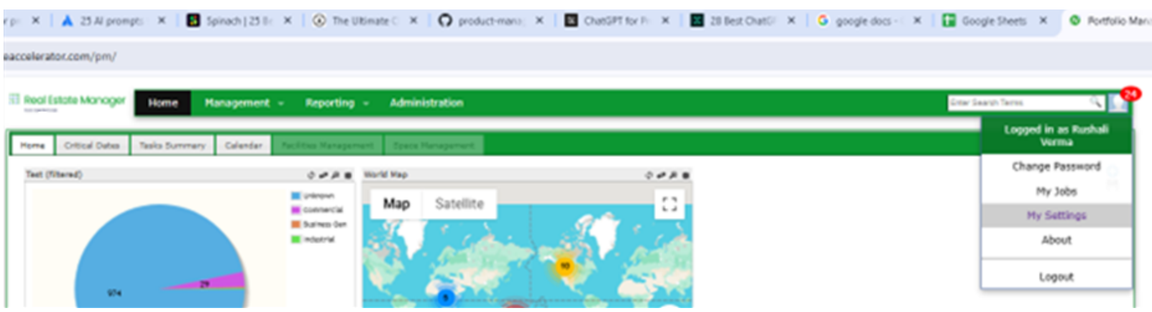
Email and Job Subscriptions

This tab allows the users to manage job subscriptions, which creates a new job on a recurring basis and optionally sends an email on completion of the job. The job results will also be available in **Reporting/ My Jobs** list. There are two types of subscriptions available:

- Critical Dates: Automated notifications for important deadlines.
- Custom Reports: Scheduled delivery of saved custom reports.

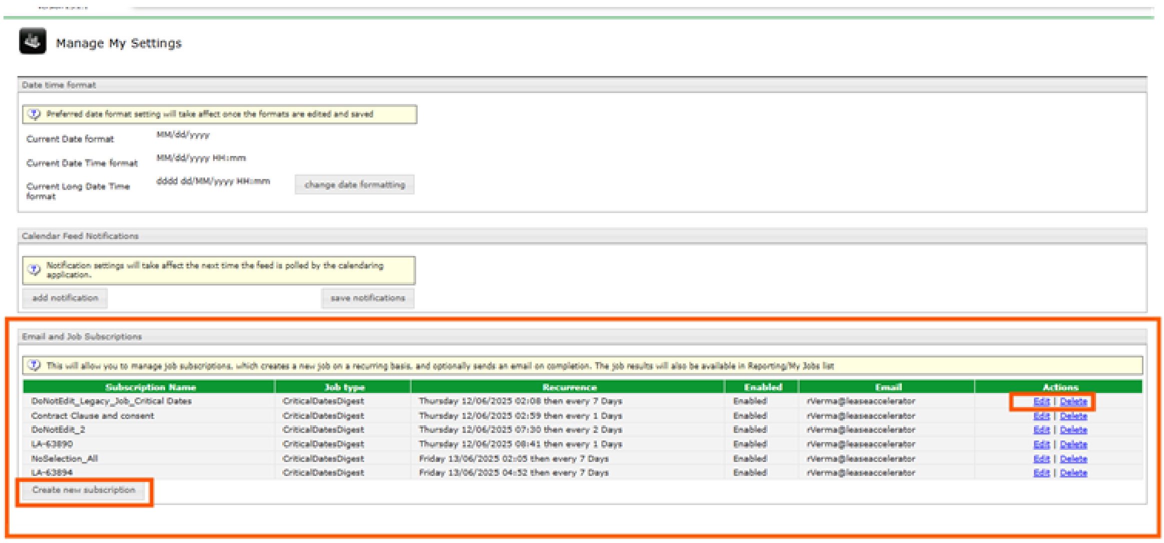
Access Subscription Settings

1. Click on your profile icon on the top-right corner.



2. Navigate to **My Settings > Email and Job Subscriptions**.
3. You can see the details of the existing subscriptions including:
   - Subscription name
   - Job type
   - Recurrence pattern
   - Status (enabled/ disabled)

- Email recipient
- Actions (Edit/ Delete)



4. Click **Edit** to make changes to the existing subscription.
5. Click **Delete** to delete an existing subscription.
6. Click **Create new subscription** to create a new one.

Setting Up a Critical Dates Digest Subscription

In the subscription form, review or update the following:

- Job name
- Frequency (For example, first of every month)
- Next due date (You can set a past date to trigger an immediate email).

Apply Filters

Real Estate Manager allows users to apply filters when managing subscriptions to the Critical Dates Digest. This enables more targeted and relevant email reports, helping users stay focused by surfacing only the most important information. By eliminating noise and delivering personalized digests, users can make better-informed decisions with greater efficiency.

1. Scroll down to the **Filters** section.
2. You can filter the digest by:

- Terms
- Include Overdue Dates
- Business Units
- Asset Types
- Task Categories
- Assignees

> **Note:** If no filters are selected, all data will be included by default.

3. To select multiple items, hold Ctrl (Cmd on Mac) and click the desired options.

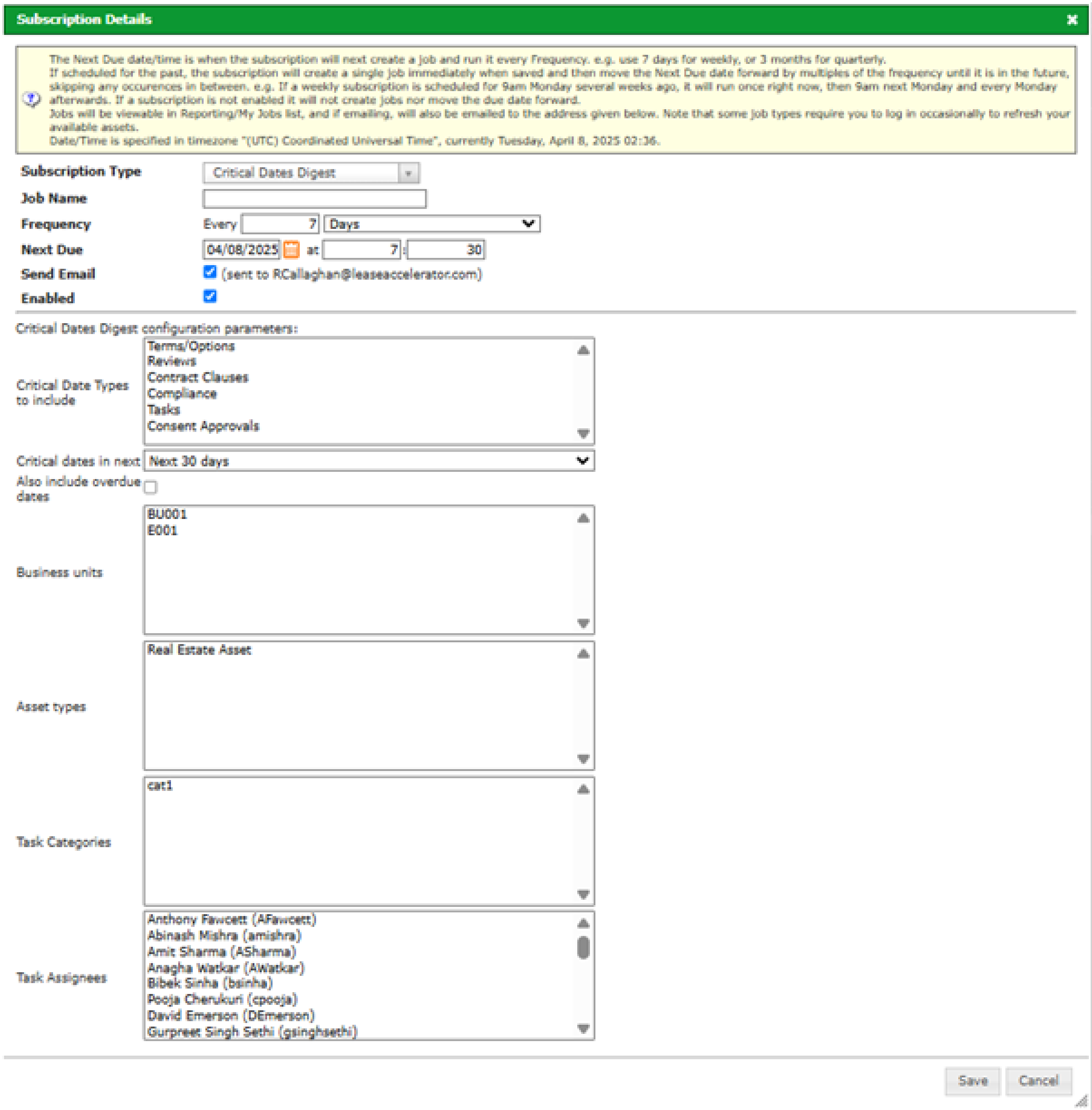
Save the Subscription

1. Click **Save** to apply your changes.

> **Note:** Existing subscriptions continue to work without changes.

2. A confirmation message will appear. The system will send the digest email to the configured address.

> **Note:** Subscriptions remain private and cannot be forwarded to others.



View Digest Report

1. Navigate to **Reports > View Current Jobs**.
2. Locate your job in the **My Jobs** list.
3. Refresh the page if needed to see the latest status.

Setting Up a Custom Report Subscription

The Custom Reports and Subscriptions feature in Real Estate Manager enables commercial real estate teams to automate the delivery of critical reports and deadline reminders. Whether you're tracking lease expirations, rent escalations, compliance milestones, or portfolio performance, this feature ensures the right data reaches the right people.

Instead of manually generating reports or checking dashboards, users can subscribe to saved reports or critical date digests and receive them via email on a recurring schedule.

Why This is Useful

- Lease Administrators can receive automated alerts for upcoming lease renewals or expirations.
- Asset Managers can track performance metrics across properties without logging in daily.
- Controllers and Finance Teams can schedule monthly or quarterly reports for invoicing, accruals, or compliance.
- Executives can stay informed with high-level summaries delivered directly to their inbox.

How It Works

Save Your Custom Report

Go to the **Reporting** page and create a custom report. Make sure it's saved (not just a built-in or canned report).

Access Subscription Settings

1. Navigate to **My Settings** and locate the section labeled **Email Job Subscription**.
2. Click **Create New Subscription**.

Configure Subscription Details

Enter the following details:

- Job name- a descriptive name for the subscription.
- Frequency- How often the report should be sent. For example, weekly, monthly, quarterly, annually.
- Next due date- The first delivery date.
- Email address- The email address to which the report should be sent.
- Enable status- Ensures the subscription is enabled to activate the job.

Select Your Report

From the drop-down menu, select the custom report you want to subscribe to.

Note: You can only select one report per subscription. To subscribe to multiple reports, create separate subscriptions for each.

Note: Click **Go to report definition** to view the details of the filter for the selected custom report.

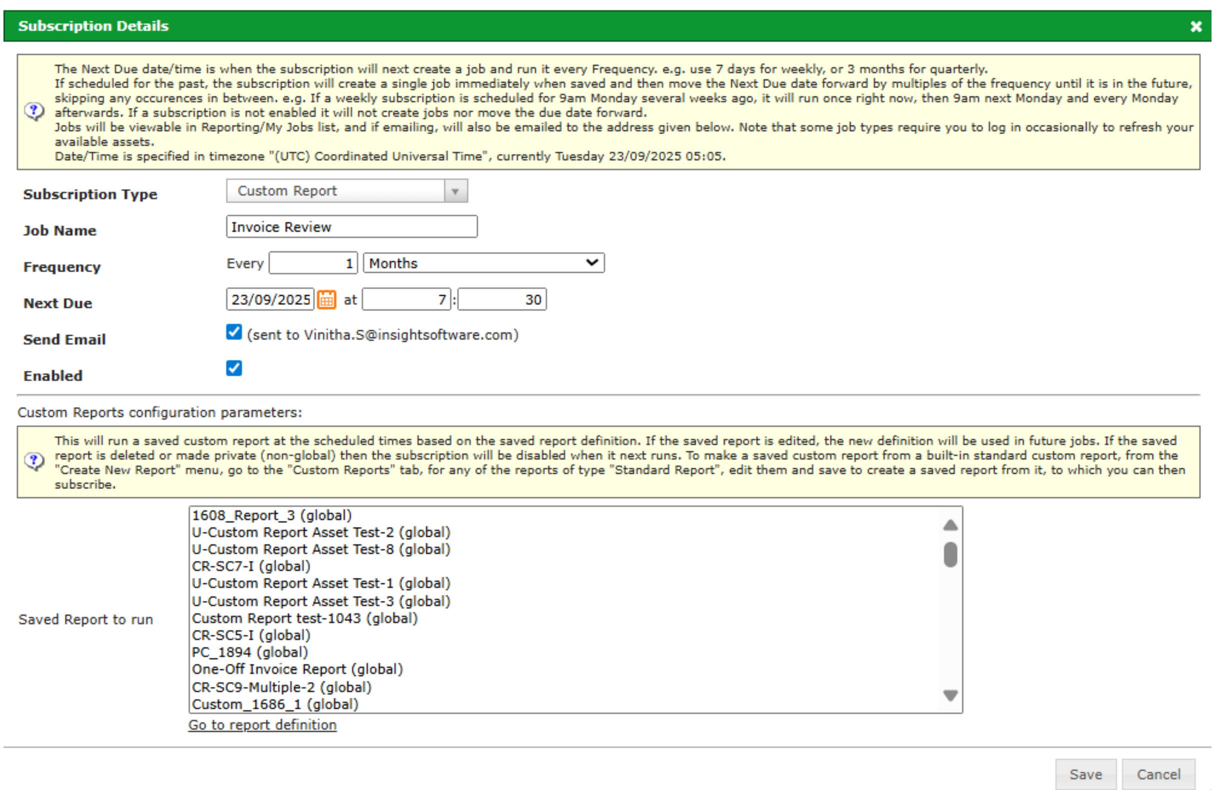
Save Subscription

1. Click **Save** to create the subscription. Once set up, your report will be emailed to you whenever it runs and there is no need to log in or click anything.

2. Your new subscription will appear in the subscriptions list.

3. You can edit the subscription anytime by clicking the **Edit** option. To delete a subscription, click **Delete**.

Note: The user can also set up subscription from the **Custom Reports** screen. When viewing a custom report, click **View My Subscription** next to the report name. This opens the subscription setup page. Select **Custom Reports** from the drop-down, choose the desired report from the list, then complete the configuration steps (job name, frequency, next due date, email address, and enable status) following the steps mentioned above.



Email Example

Here's what your email might look like:

Subject: Real Estate Manager: 'Monthly invoice costs' Custom report [subscription]

Body:

Hello,

Your subscribed report 'Monthly invoice costs' is attached.

Thanks,

Real Estate Manager

Report Submitted: 31/12/2025 12:34:56

Company: Acme | Job ID: 123 | Subscription ID: 456

Manage your subscriptions

Important Notes

- You can only subscribe to saved custom reports (those with a “delete” option next to them).
- If a report is deleted or made private by another user, your subscription will be disabled automatically.
- You'll see a message if a report you're subscribed to becomes unavailable.
- Editing a saved report updates future subscription jobs with the new settings.
- You can change which report a subscription runs, but not the subscription type once it's created.

Why It Matters

- Save time with automated delivery.
- Stay informed with up-to-date reports.
- Customize your preferences for format and frequency.
- Manage everything easily from one place.

Troubleshooting and FAQ

Setting Up a Custom Report Subscription

The following are some of the common troubleshooting FAQs for setting up a custom report subscription:

Why didn’t I receive my scheduled report email?

There are several possible reasons:

- The subscription is not enabled.
- Your access is revoked.
- The report failed to run due to missing data or invalid filters.

What to do

Check if you have access to Real Estate Manager. If Yes then, check the subscription status **under My Settings > Email Job Subscription**. Ensure the subscription is enabled and the email address is correct. Try running the report manually to confirm it executes successfully.

Why is the report I want not showing in the subscription drop-down?

Only saved custom reports are available for subscription. Built-in or unsaved reports will not appear in the list.

What to do

Go to the **Reporting** section, open the report, and click **Save**. Confirm that the report is saved as a global (shared) report if it needs to be accessed by others.

What happens if a report I’m subscribed to is deleted or made private?

If a report is deleted or made private by another user, the subscription will be automatically disabled. You may also see a message indicating that the report is unavailable.

What to do

Contact the report owner to restore or re-share the report. Alternatively, create a new report and update your subscription to use it.

Can I subscribe to multiple reports in one subscription?

No. Each subscription supports only one report.

What to do

Create a separate subscription for each report you want to receive.

Why is my report missing recent data or showing outdated results?

This may occur if the report filters are outdated or the underlying data has not been refreshed.

What to do

Review the saved report’s filters and confirm that the data sources are current. Re-save the report if necessary.

How do I know if a subscription job failed?

Failed jobs will not send emails and may appear with an error status in the **My Jobs** list.

What to do

Go to **Reporting > My Jobs**, locate the job, and check its status. If needed, re-run the report manually to identify and resolve the issue.

Version Summary

Version	Changes/Updates	Date
21R2.1	Guide created. Home workspace broken out from larger guide.	07/22/2021
23R3	Removed all reference to Real Estate Manager.	08/07/2023