SSI Administrator TruSpace User Guide

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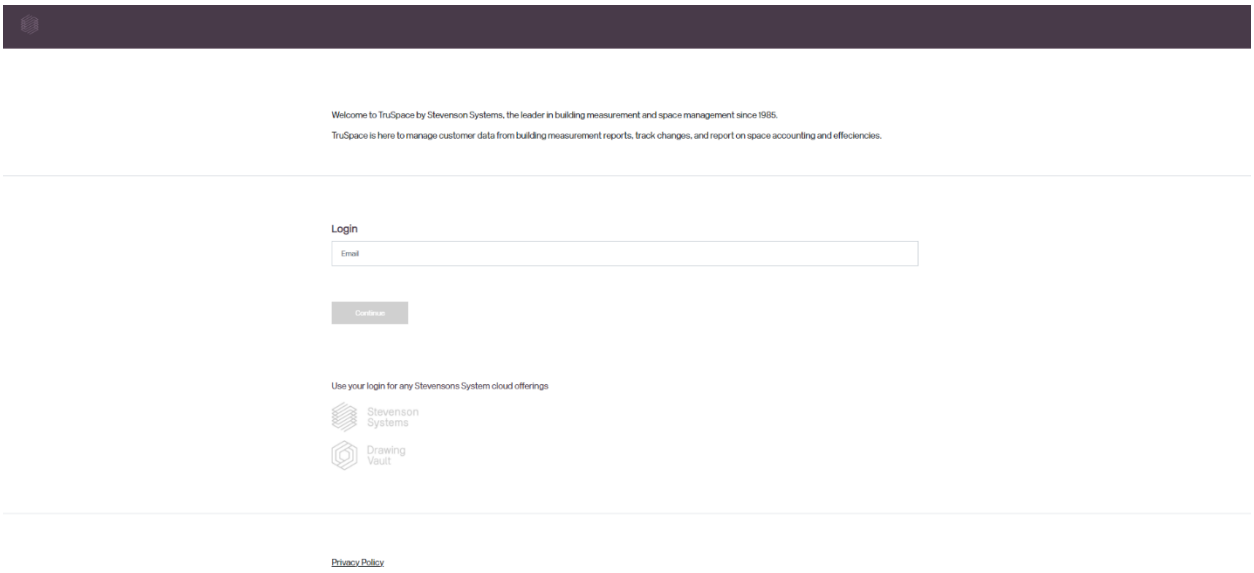
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1.0 TruSpace Onboarding Procedures

1. Contract is negotiated and signed by client
2. If report has been finalized but is NOT in TruSpace:
    a. Building is confirmed and activated in TruSpace
    b. RP and PT Command is run in CAD
    c. Report is set as SSI Viewable
    d. QC of report and tenant data
    e. Building report is activated in TruSpace.
    f. Report is set as Client Viewable
    g. Report is shared with contract contact
3. If the report has NOT been finalized and building is NOT in TruSpace:
    a. Company is created in TruSpace
    b. Building is created in Drawing Vault
    c. Building is confirmed and activated in TruSpace
    d. RP command is run in CAD
    e. PT command is run if there is tenant data
        i. Creating a prelim report
    f. Report is set as SSI Viewable
    g. QC of report and tenant data
    h. If changes are made to tenant data,
        i. Rerun PT command
        ii. Rerun RP command to finalize report
        iii. QC of finalized report and tenant data
    i. Building report is activated in TruSpace
    j. Report is set as Client Viewable
    k. Report is shared with contract contact
4. Company Administrator/Manager receives invitation/share email.
5. Company Administrator/Manager sets up their account.
    a. Upon setting up their account they accept their user role and assigned properties.
6. Report Review is done with client

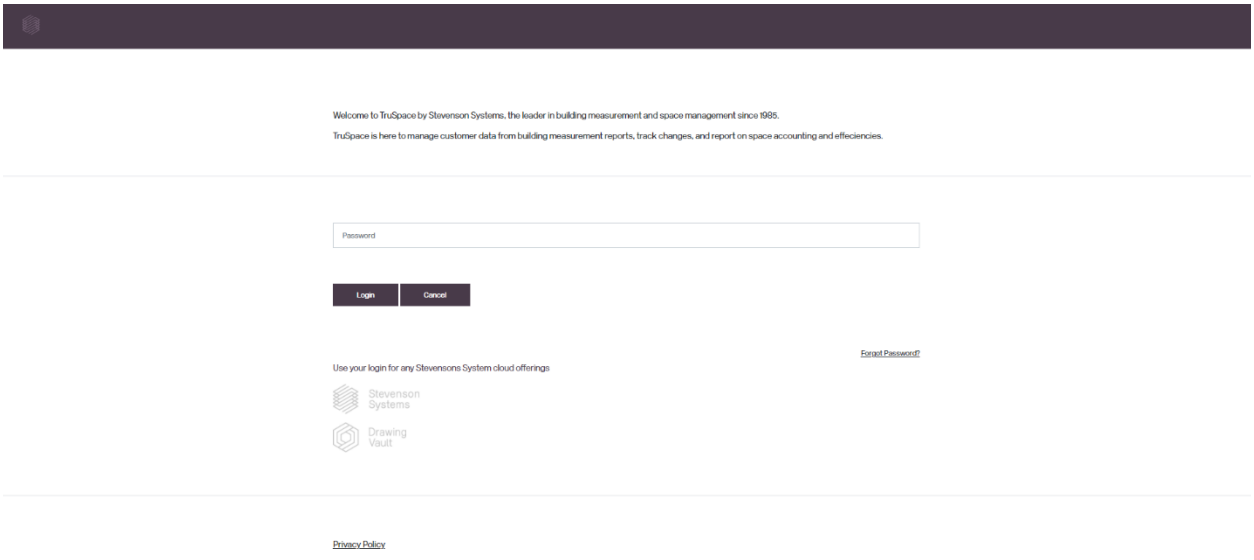
2.0 Login

Go to www.truspace.com and login with your SSI email.



Click **Continue**.

Enter your network password under **Password**.

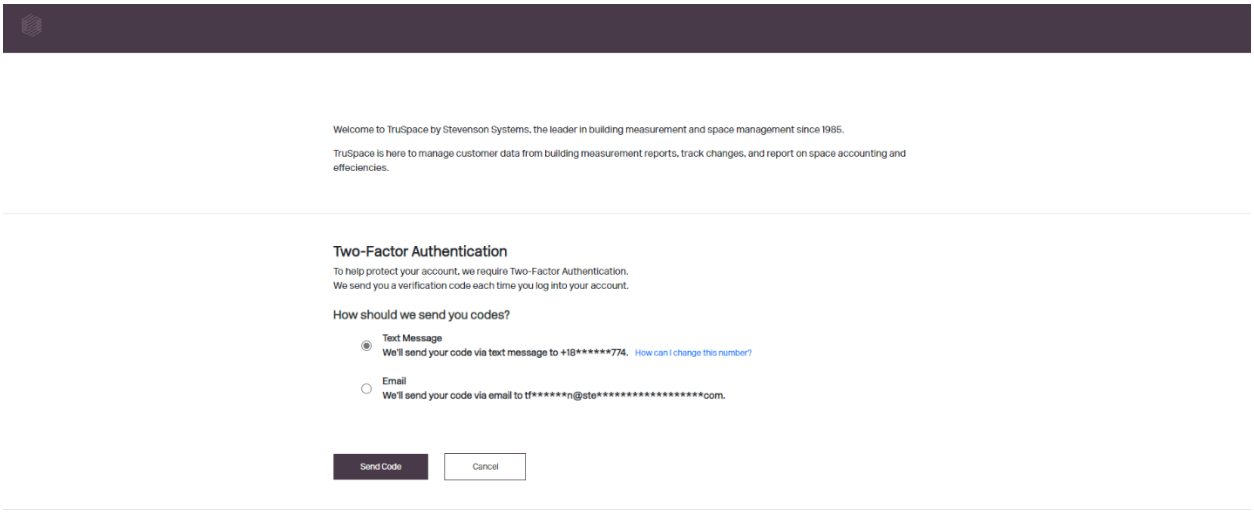


Click **Login**.

2.1 Two-Factor Authentication

Upon signing in, you will be asked to verify your account, if you haven't already done so.

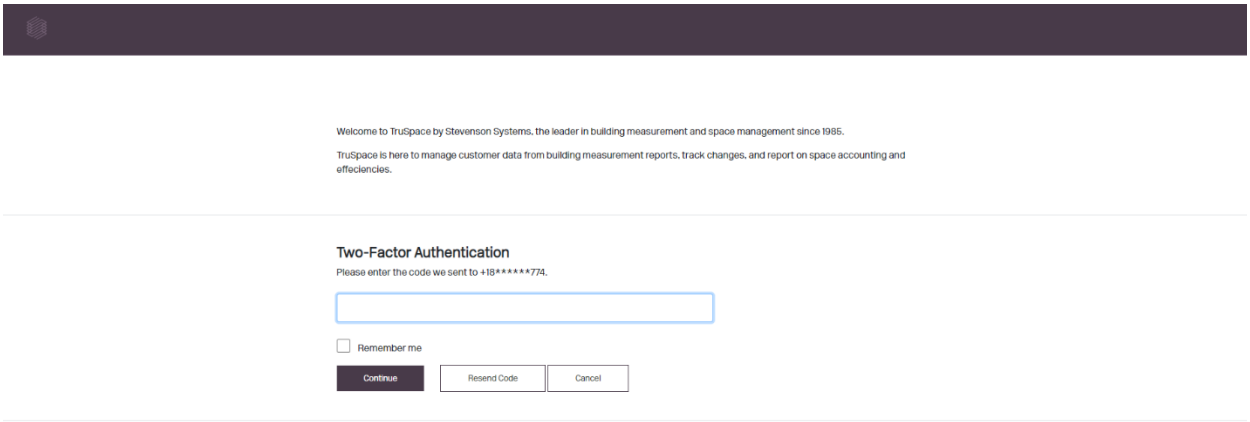
You will be prompted to select either your Stevenson Systems email or your phone number to send a verification code to. The phone number listed is your phone number in Active Directory, to change this please contact Jesse Browne.



Select which mode of delivery you prefer.

Click **Send Code**.

A verification code will be sent via the delivery selected. Enter the code into the space provided.



You will have to verify your account each time you log in if the Remember Me checkbox is left unchecked.

Check the **Remember Me** checkbox.

Click **Continue**.

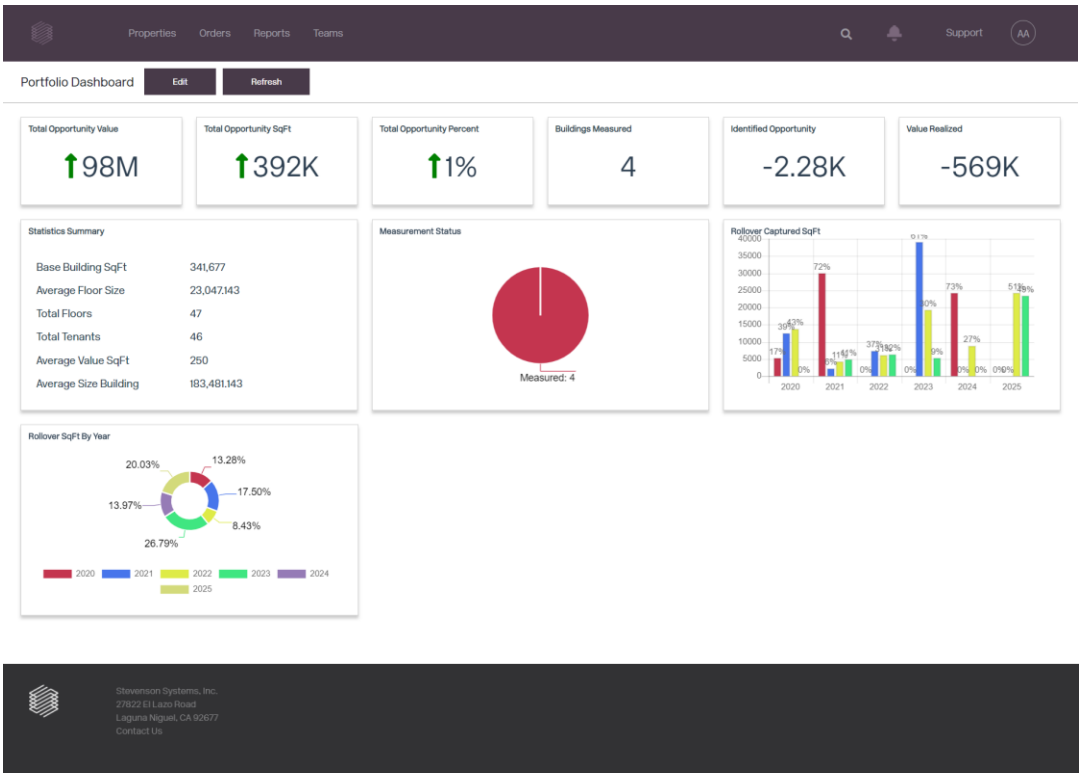
You will be logged into your account.

3.0 DASHBOARD

The dashboard is a place for you to see statistics related to all SSI buildings.

The data displayed here, unless specified otherwise, is for **FINAL** reports.

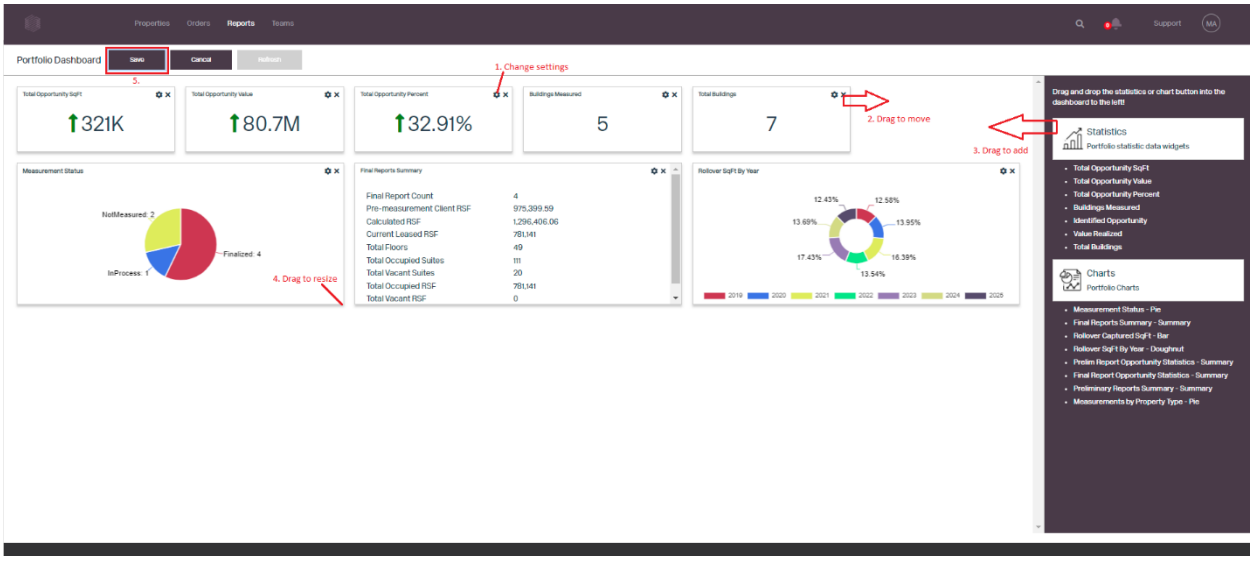
If at any point, you would like to return to your dashboard, click the Stevenson Systems logo in the top left-hand corner of the page.



3.1 EDITING THE DASHBOARD

To customize the portfolio dashboard, click **Edit**.

Here you can drag and drop a statistic or chart into your dashboard (2 and 3), then select the type of statistic or chart from the dropdown that you would like to add.



To edit an existing widget, click on the **Settings** icon (1) in the top right-hand corner of the existing widget. From here, you can select the new type of widget and/or select a different region for a statistic to represent. Click **Apply** to save any changes made to the specific widget.

Click **Save** (5) to save any changes made.

4.0 Property Information

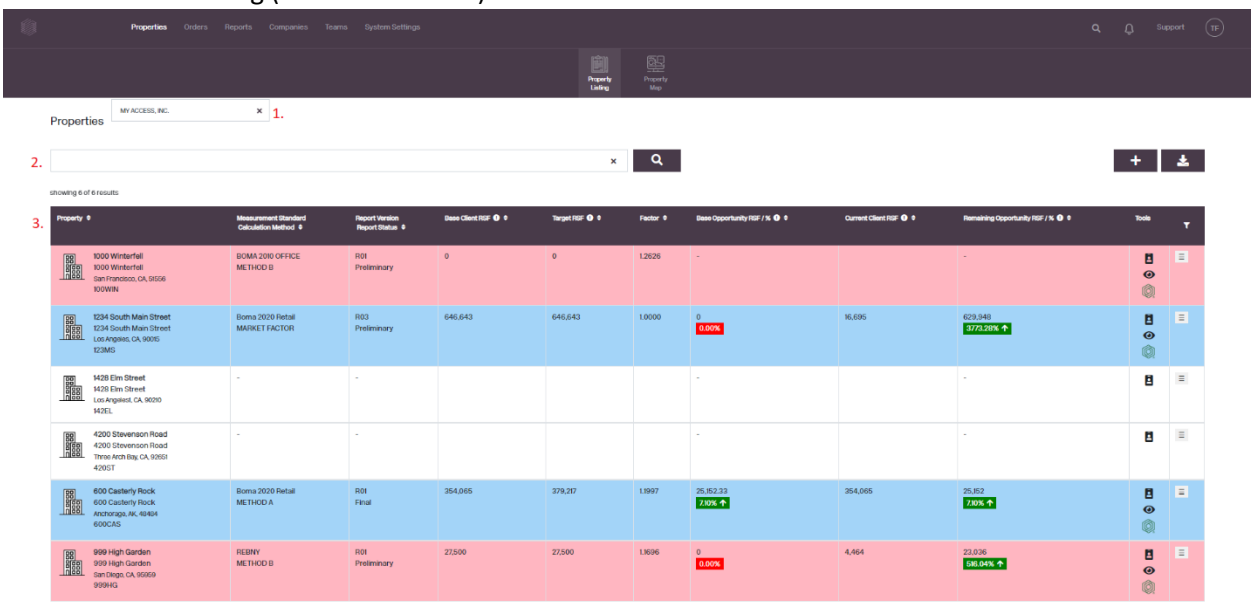
4.1 Property Listing

Property Listing displays all properties in our database. Clicking on a property will redirect you to the **Measurement Reports** page.

The information provided in the table is generated by the Report Version selected under SSI Viewable Report Version in the **Property Summary** page.

In the screenshot below you will see that 999 High Garden and 1000 Winterfell are highlighted in pink, indicating that the report being displayed is a preliminary report. Additionally, 1234 South Main Street and 600 Casterly Rock are highlighted in blue, indicating that the report you're seeing doesn't match

what a client is seeing (see SSI Viewable).



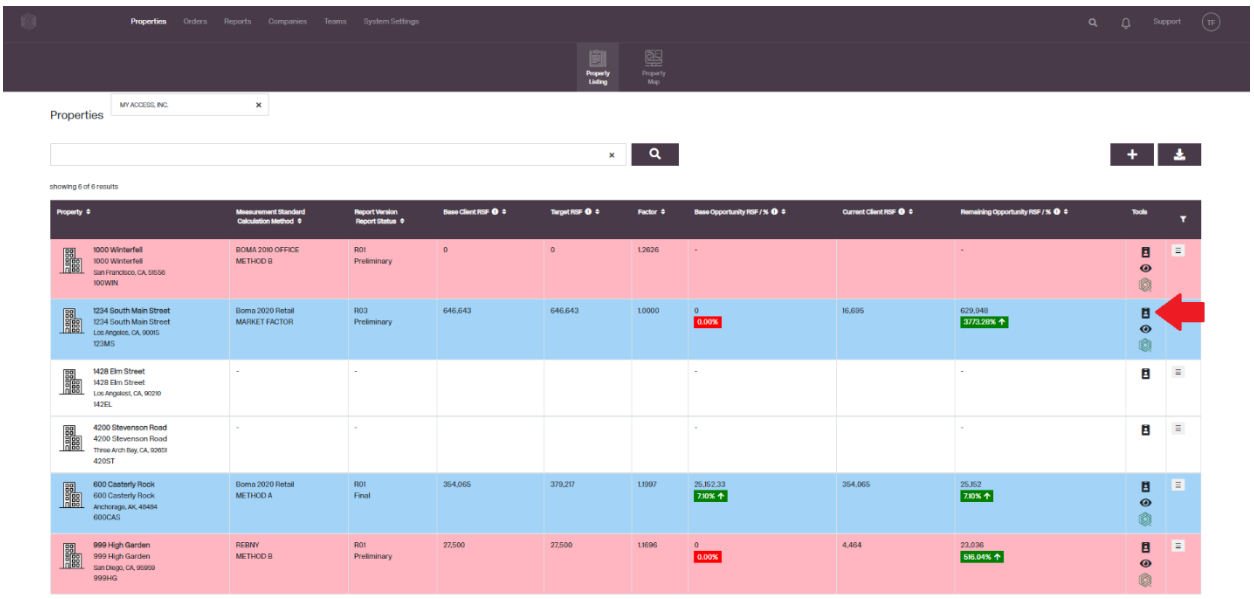
1. Company Filter – here you can filter properties in the table by Property Owner.
   Note: The screenshot above is filtered for MyAccess, Inc. properties.
2. Table Search – here you can search the table by all fields in the property's address (Building Name, Building Address).
3. Table
   a. Property – property address, building name, building code
   b. Measurement Standard/Calculation Method – measurement standard and calculation method used for the report version selected under SSI Viewable
   c. Report Version/Report Status – The report version and status of the report selected under SSI Viewable
   d. Base Client RSF
   e. Target RSF
   f. Factor
   g. Base Opportunity RSF/%
   h. Current Client RSF
   i. Remaining Opportunity RSF/%
   j. Tools
      i. Property Tenant Log
      ii. Building Measurement Report
      iii. Drawing Vault
   k. Actions
      i. Create an Order
      ii. View All Orders
      iii. Invite a User

You can also view and download a summary of all building reports. To download all buildings, click the **Download icon** .

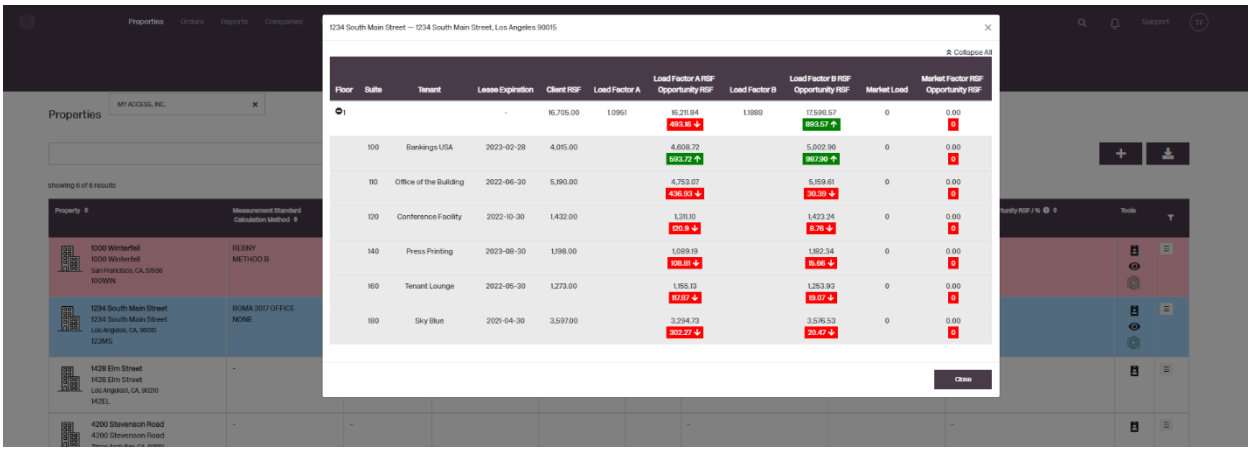
A **return-to-top arrow** will appear on the bottom right-hand side of the page if you have scrolled beyond the first page. Click the icon to return to the top of the page.

4.1.1 Property Tenant Log

Click on the **Property Tenant Log icon** to quickly view a Tenant list by floor.

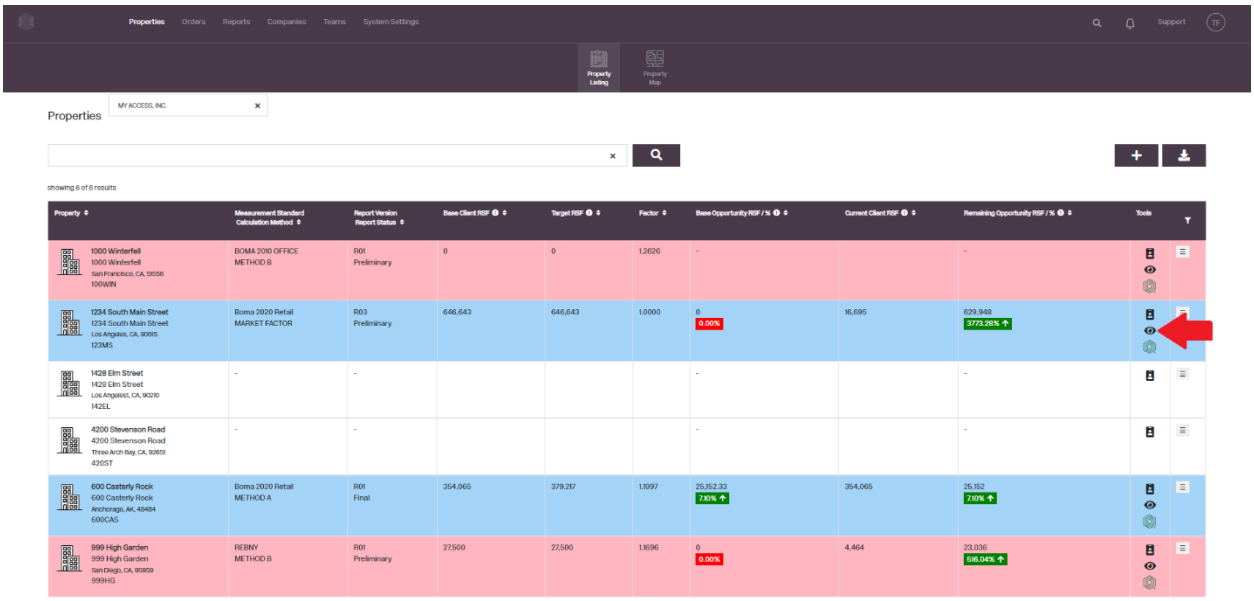


The log will display rentable square footage information for each floor and each suite within that floor. This is an identical view of the Tenant Listing.

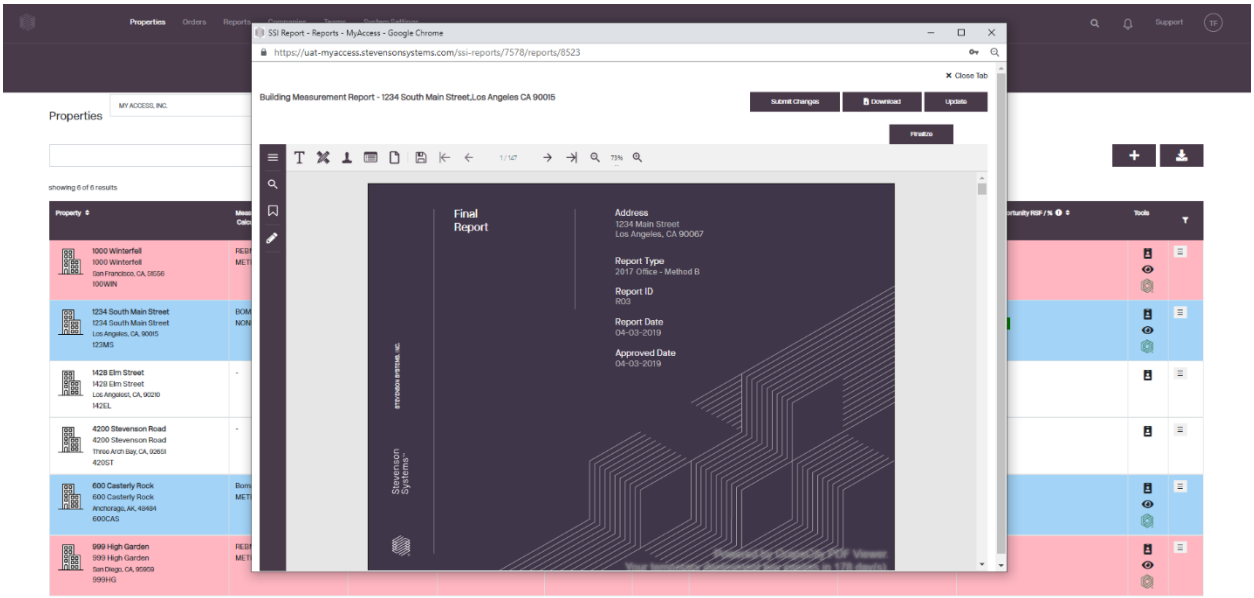


4.1.2 Building Measurement Reports

To view an individual property's building measurement report, Click the **Building Report icon** .



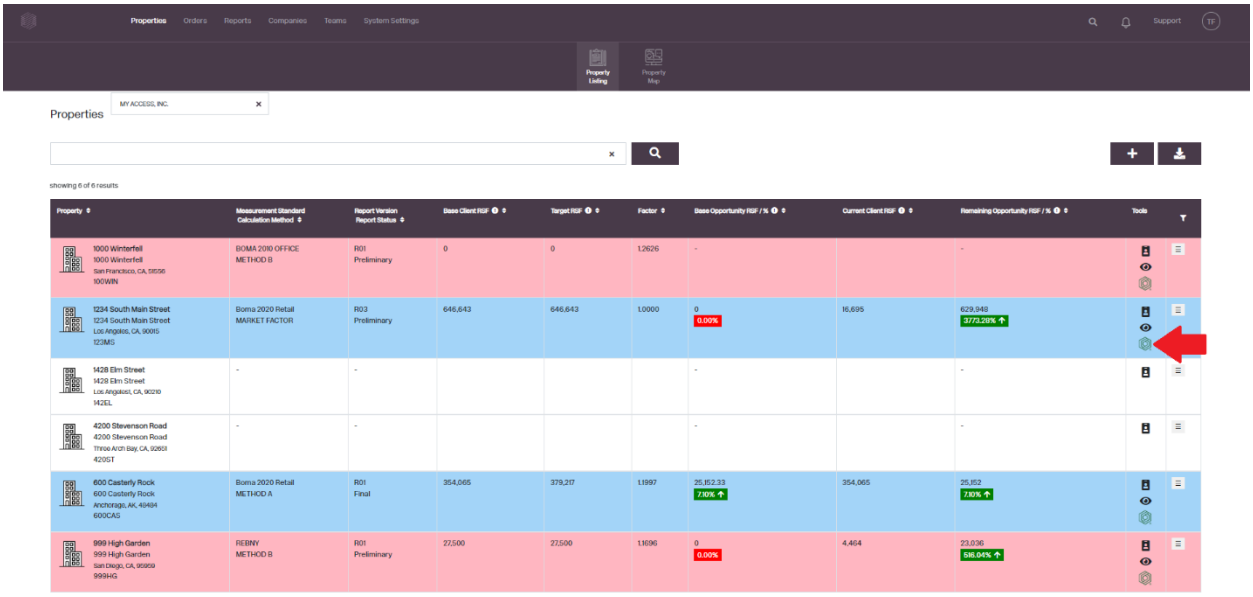
Once selected the Measurement Report opens in a new window.



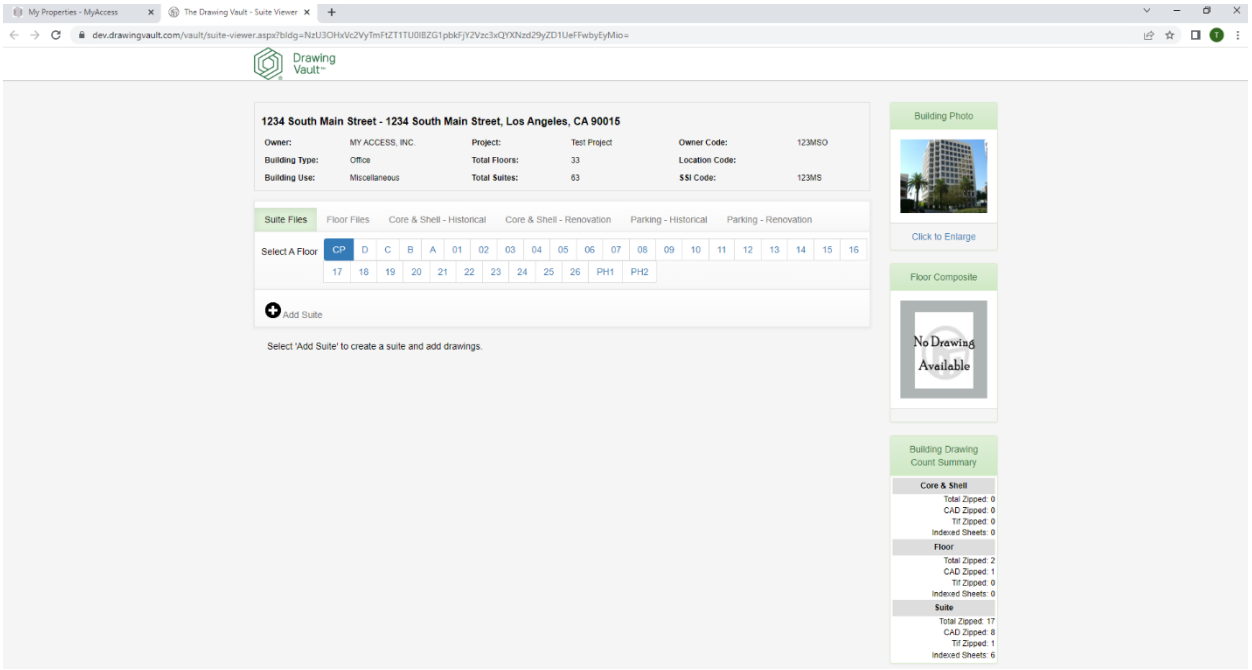
Annotations can be done directly within the report. You can update the annotations, submit changes, download the PDF, or finalize the report within the window.

4.1.3 Drawing Vault

To access CAD drawings via the drawing vault, click on the **Drawing Vault icon** from the property listing page.



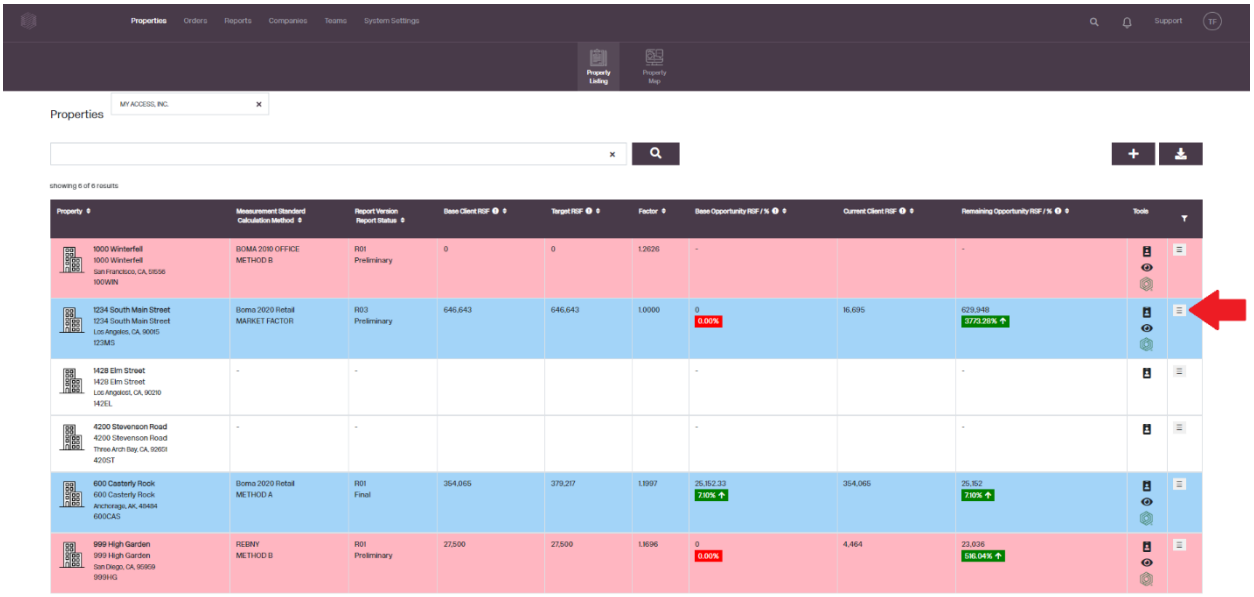
A new tab will open, allowing access to the drawing vault for the selected property.



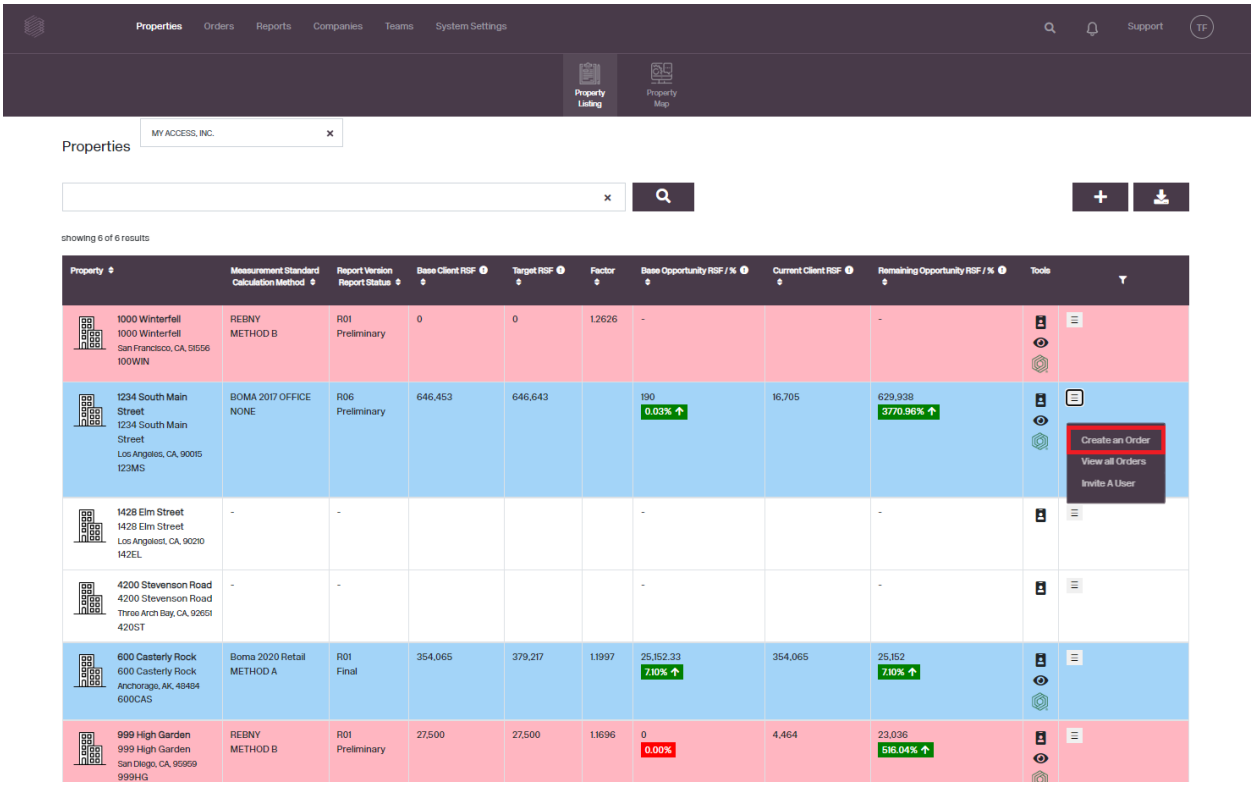
If you are wanting to access a different property within Drawing Vault, you will either have to find the property within TruSpace and click on the Drawing Vault icon for that individual property, or login to the Drawing Vault admin site.

4.1.4 Create an Order via Property

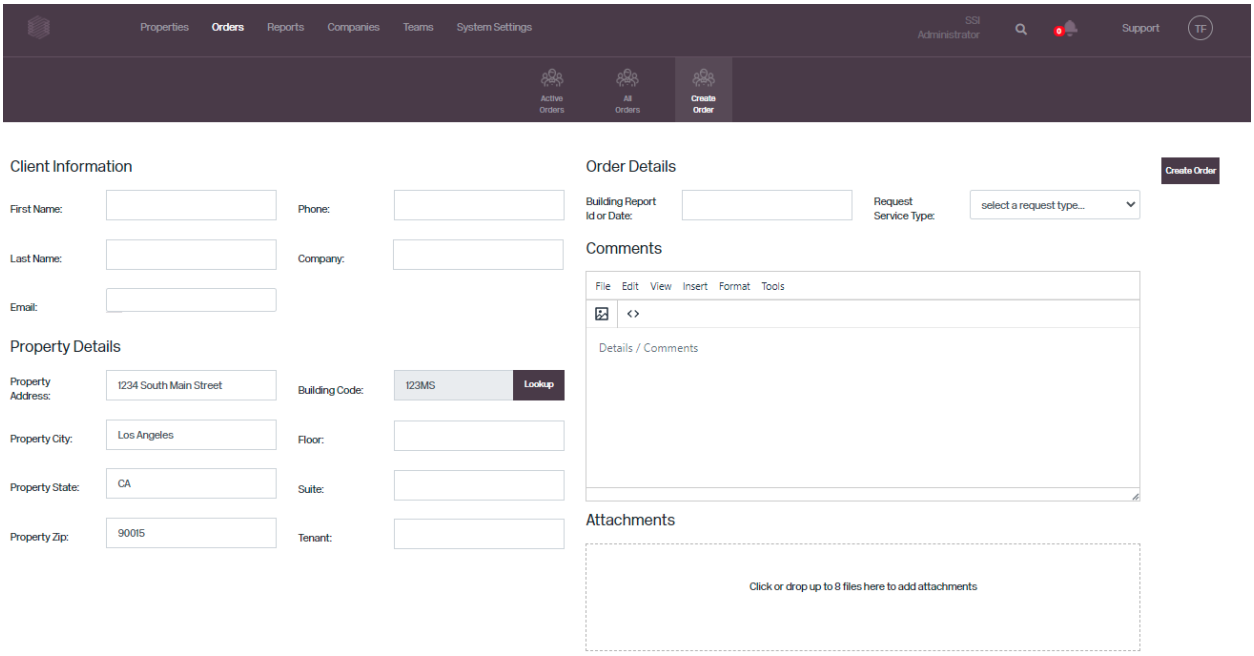
From the Property Listing table, click the menu icon on the far right.



Click **Create an Order**.



You will be redirected to the Create Order page. The address and building code are prepopulated for the selected property address (see the Property Details in the screenshot below).

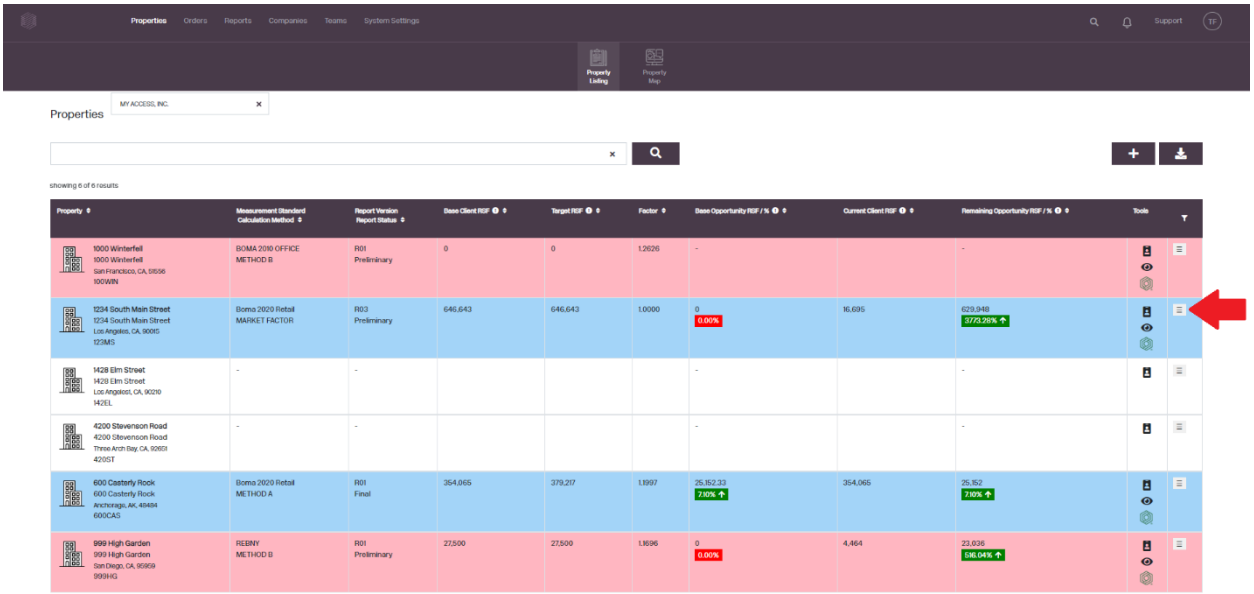


To be able to filter orders by Service Type on the Active Orders and All Orders pages, be sure to select a Service Type from the **Requested Service Type** dropdown.

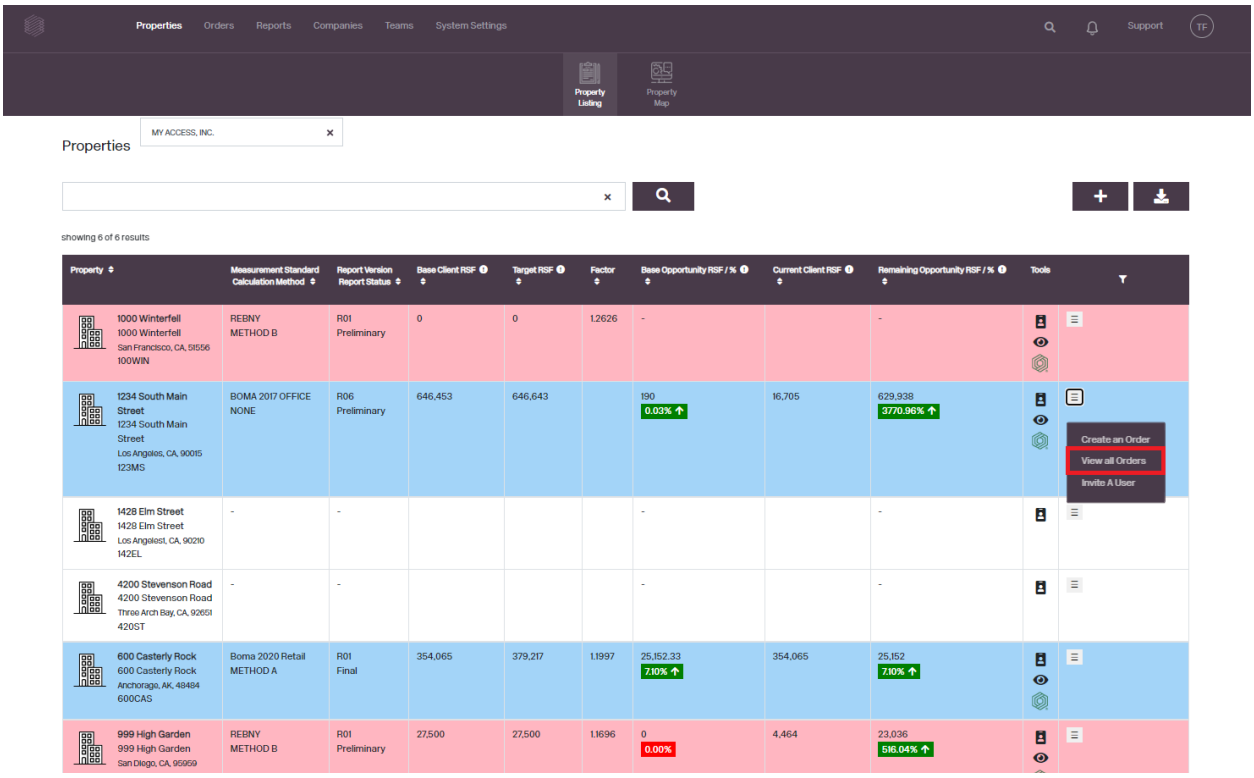
Enter the required fields and click **Create Order.**

4.1.5 View All Orders via Property

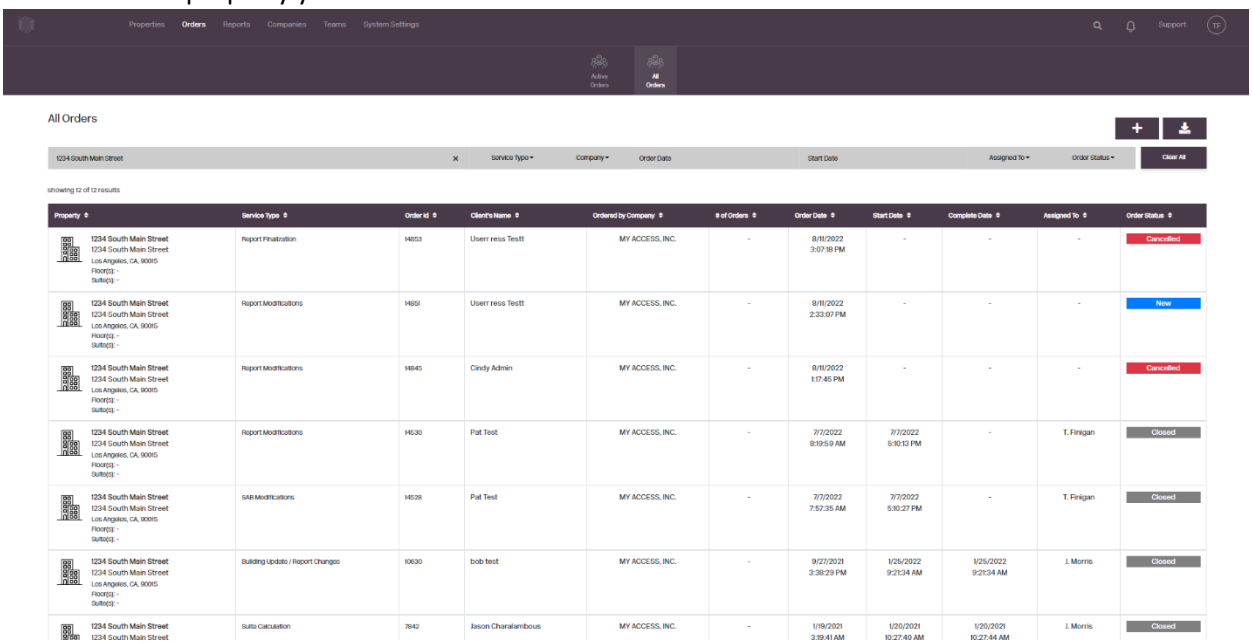
To view all orders for the specific property from the Properties list, click on the menu icon on the far right.



Click on **View All Orders**.



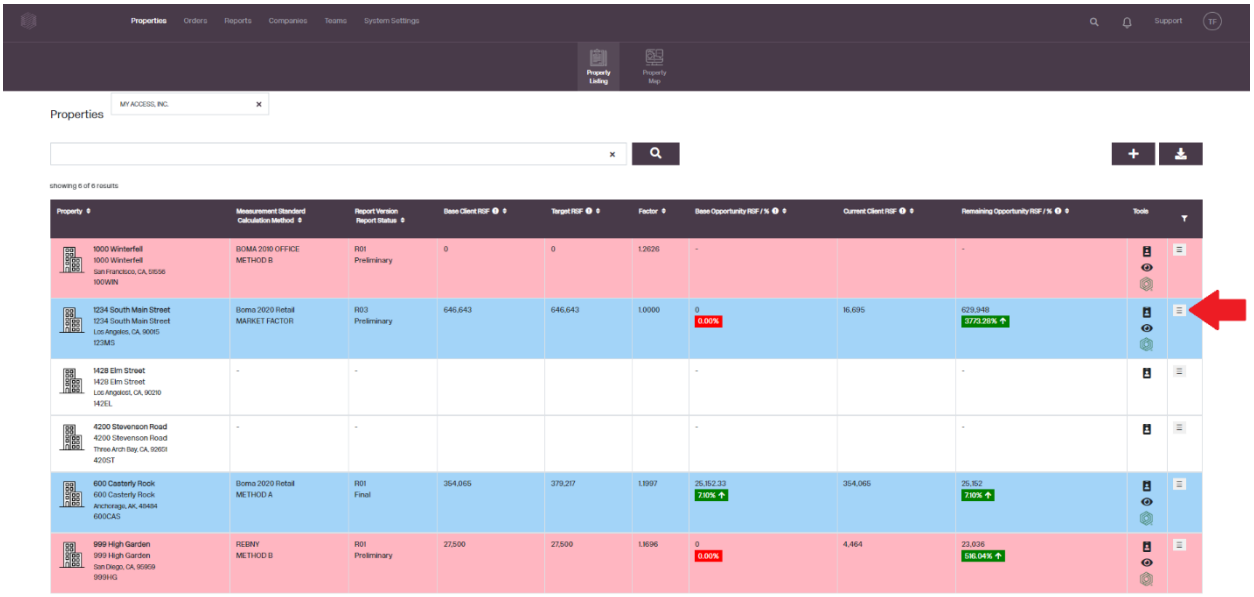
Once selected, you will be redirected to the All Orders page, where the search bar will be prepopulated to filter for the property you selected.



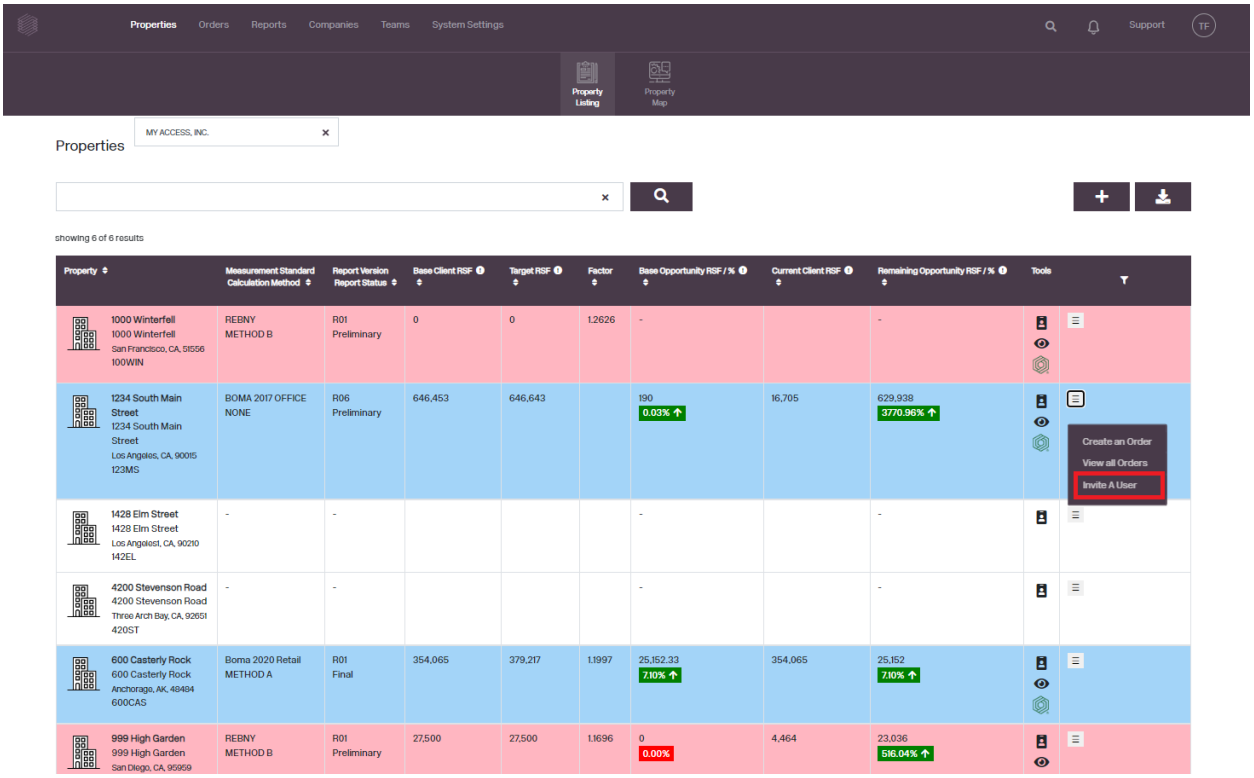
4.1.6 Inviting a New User Via Property

As an SSI Admin, you are granted the permission to invite a new user to a property.

Click on the menu icon on the far right.

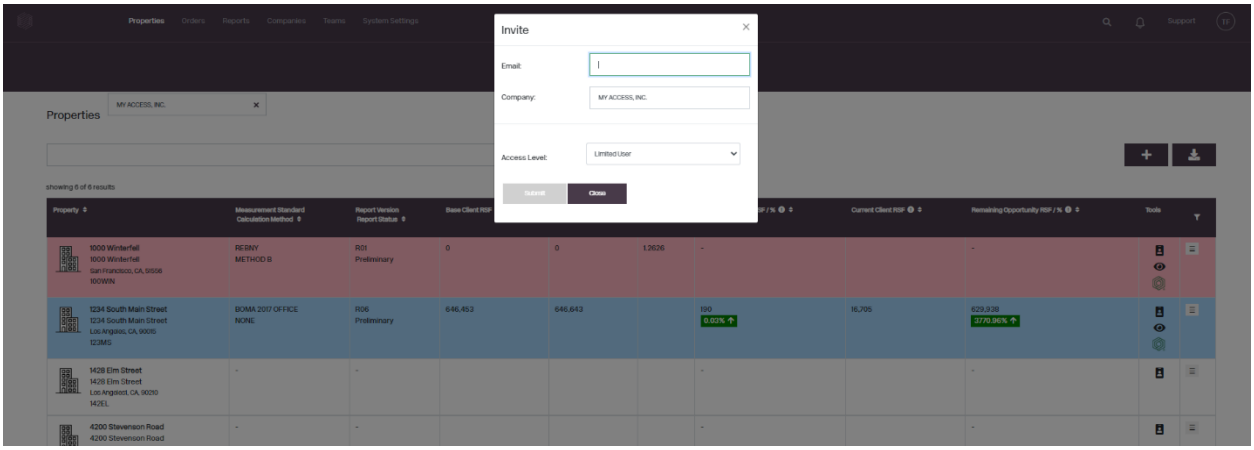


Click **Invite A User** from the menu.



Note: If a property is inactive, the **Invite a User** option will not display. To invite a user to this property, it must first be activated and Q&C must be performed.

Once selected, an Invitation overlay will be displayed.



Enter the new member's email address under **Email**.

The property owner will be defaulted as the **Company** for the new member. If this Company is not accurate for the member, click into the **Company** field, remove the existing **Company**, and type in the correct **Company**.

Lastly select the **user** **access level** for the individual you are inviting.

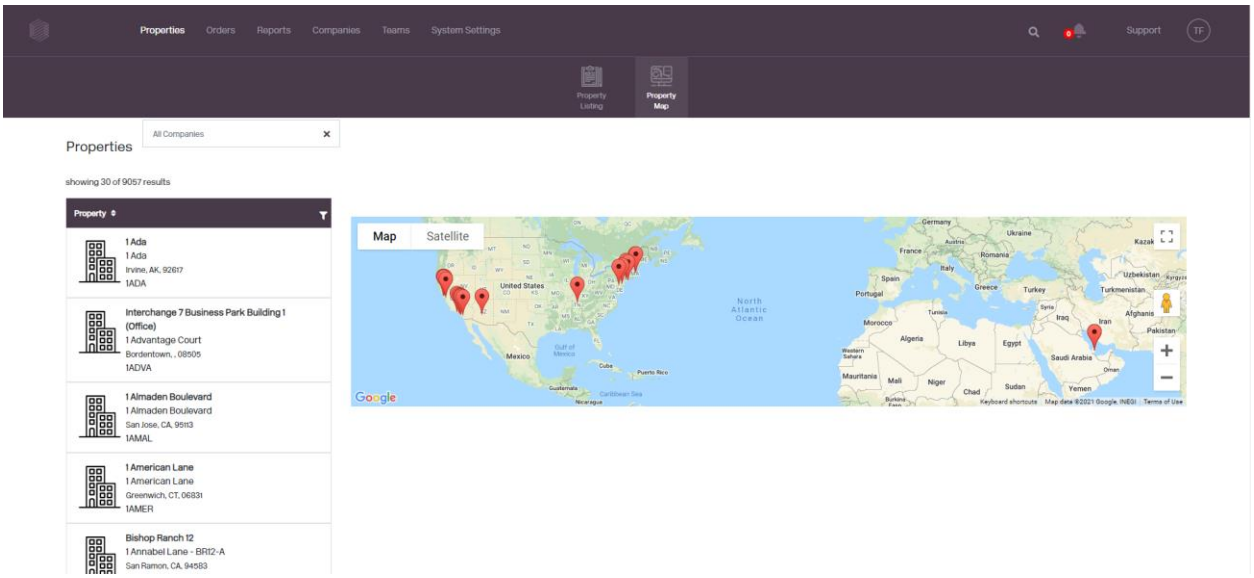
Click **Submit**.

The property mapping overlay will be displayed. From here, you can add additional properties you want the user to be invited to.

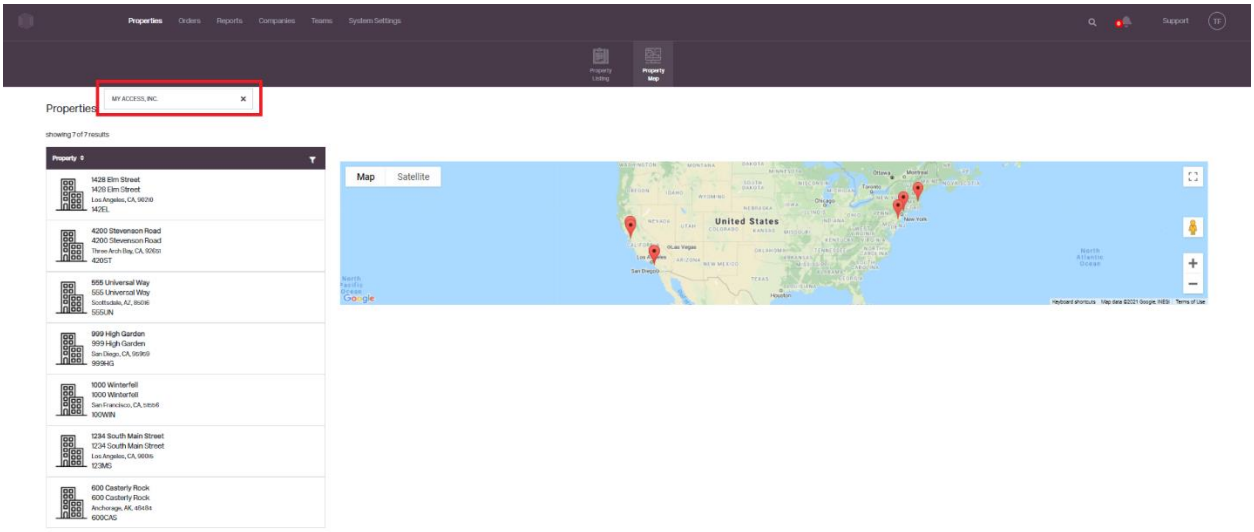
The invited user will receive an invitation email with a link to TruSpace. This will allow them to sign into or create their account, as well as accept their user role/properties before viewing the data.

4.2 Property Map

A map of all properties in the database.



You can filter the map to display only properties associated to a specific company by entering the company name into the company filter. Notice in the image below, the map is filtered for those properties associated with MyAccess, Inc.

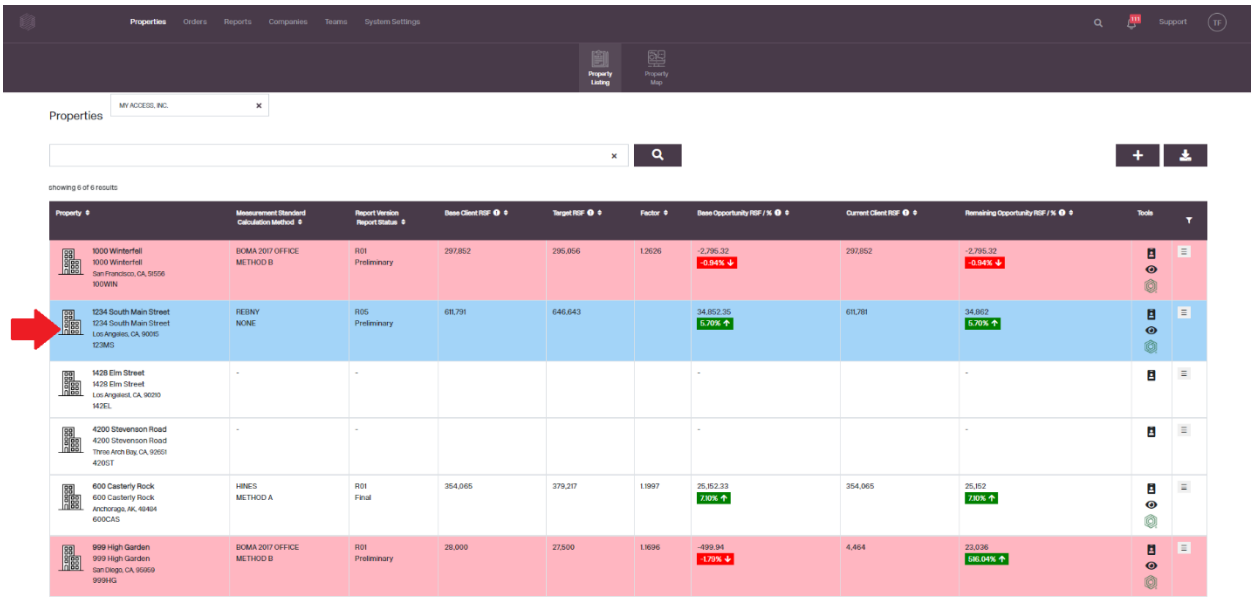


By clicking on a property in the property list, the map will zoom into the selected property. Click **Unselect** at the top of the map to return to a panoramic view.

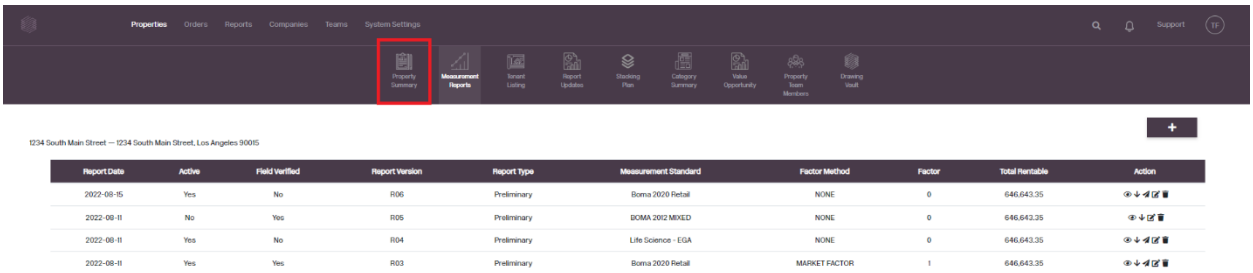
By clicking on the **red pin** on the map or doubling clicking the property address, you will be taken to the **Property Summary** page.

4.3 Property Summary

From the Property Listing page, select your desired property.



You are redirected to the **Measurement Reports** page. Click on **Property Summary** from the sub navigation.

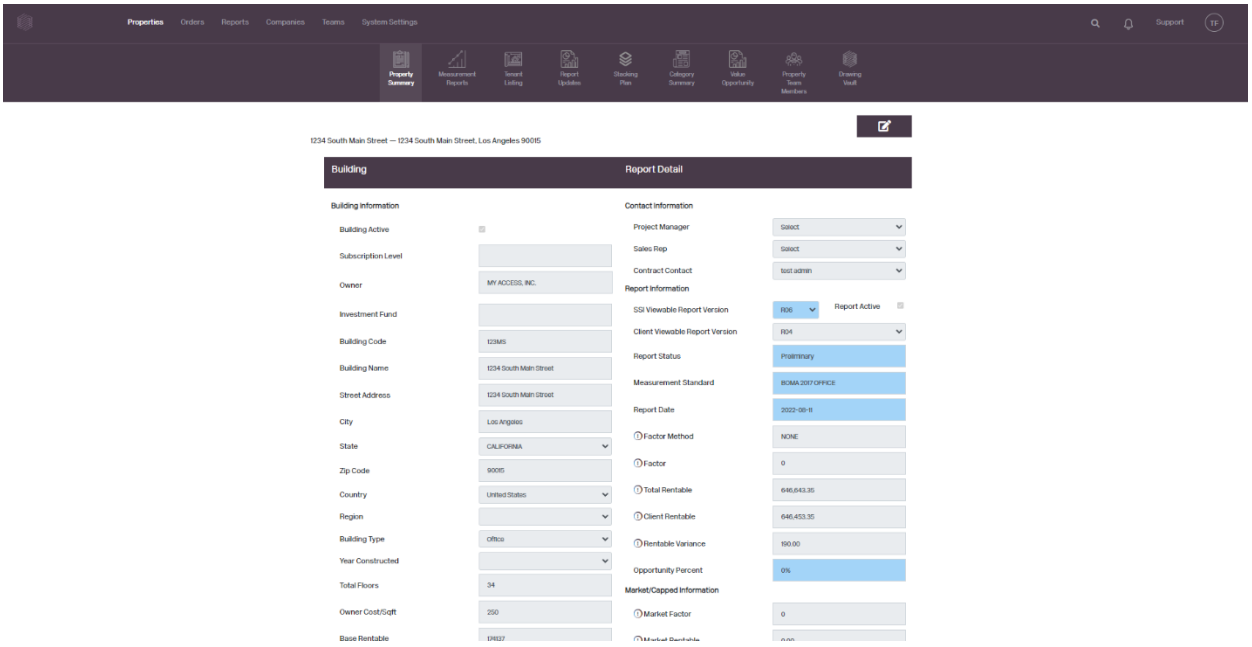


The Property Summary displays a summary of a building's information and report detail.

Building Information is specific to the property.

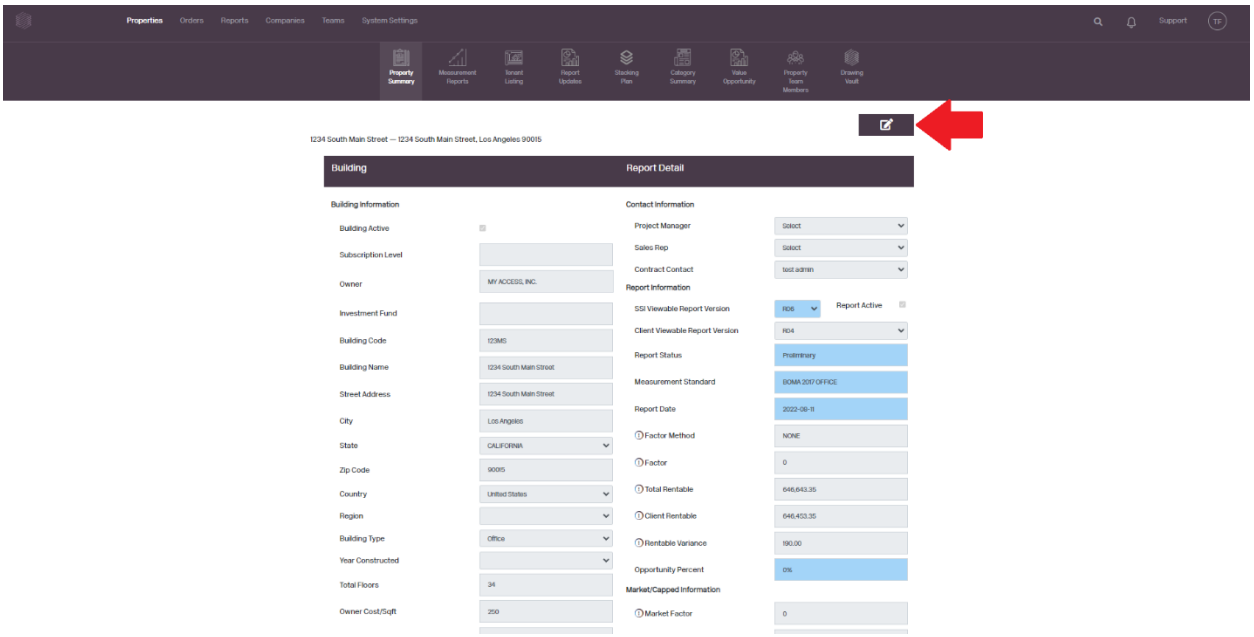
Contact Information includes our internal Project Manager and Sales Representative as well as the Contract Contact.

Report Information, **Market/Capped Information,** and **Suite Information** provides details regarding the report selected under SSI Viewable Report Version.

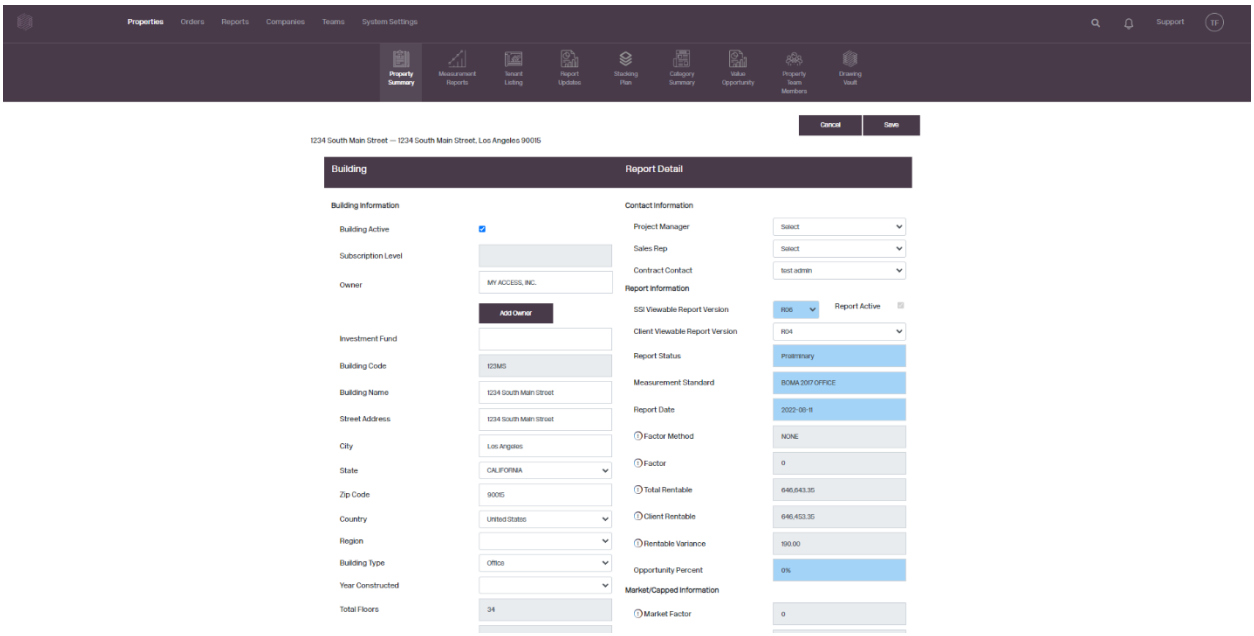


4.3.1 EDITING PROPERTY SUMMARY

As an SSI Admin you can click the **Edit icon** to edit certain fields.



Once selected you can edit the following fields:



Building

- Building Active: this allows for the building to be assigned to and viewable by a client.
- Owner: every building must be assigned an Owner. This will associate the building to a company within our database
    - **“Add Owner”** button is displayed under Owner. Click **Add Owner**. Click into the text box and start typing the company name. If the company is not in our system, add the company into TruSpace before proceeding

- Property Address: the address, city, state, zip, country, region, building type, and year constructed are editable.
    - Changes made to the building address here will need to also be changed in Drawing Vault.
    - Regions are custom to each company. To add regions to the dropdown, go to Region Generator.
- Base Rentable and Base Year

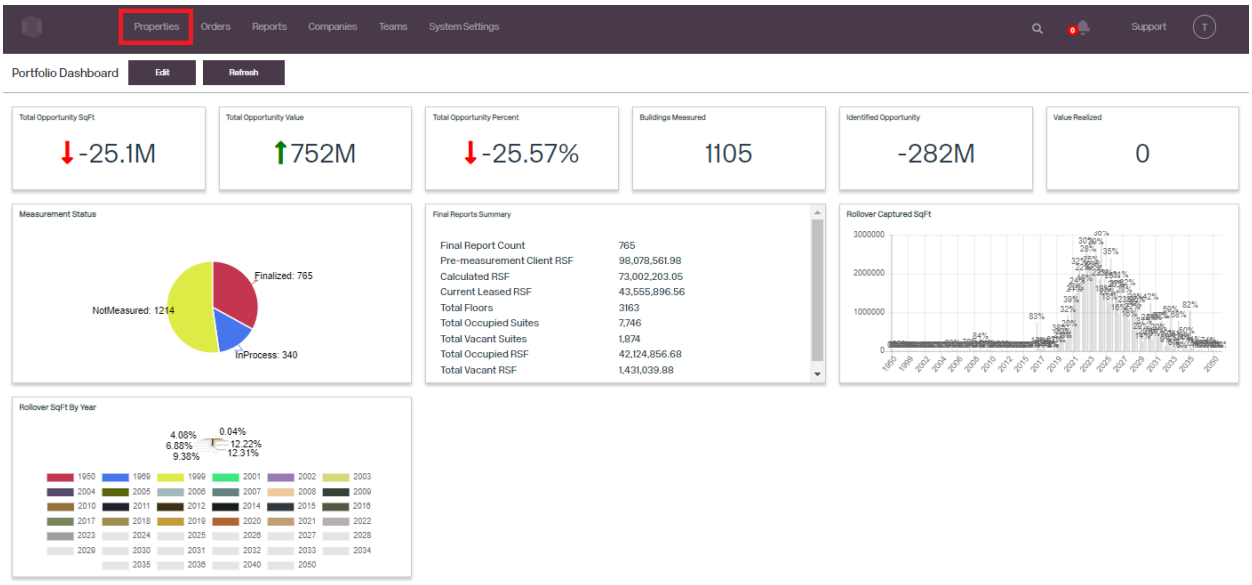
Report Detail

- Contact Information: specific to the building/project
    - Project Manager: Stevenson Systems project manager
    - Sales Representative: Stevenson Systems sales representative
    - Contract Contact: defaulted to the company administrator. This dropdown list contains all company administrators for the company under **OWNER**. If your contract contact is not displayed, invite them as a company administrator first and then assign them here.
- SSI Viewable Report Version: selected report version populates the Property Listing, Property Summary, and default Tenant Listing report version for **SSI Admin ONLY**.
- Client Viewable Report Version: selected report version populates the Property Listing, Property Summary, and default Tenant Listing report version for **CLIENTS**.
- Report Summary: this data is directly coming from CAD. Any changes made here will be directly reflected in the Tenant Listing

Click **Save** to save any changes made.

4.3.2 Activating a Building

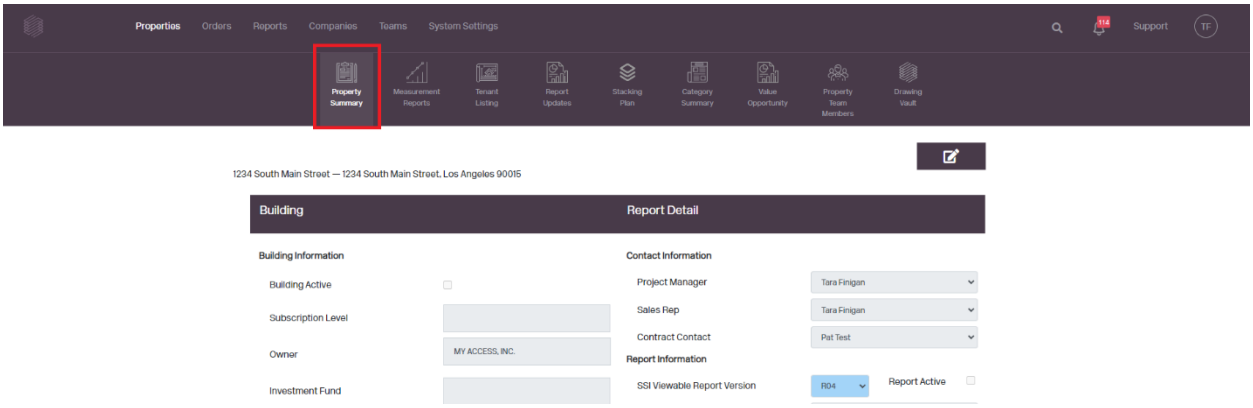
To activate a building, select the **Properties** tab from the main navigation.



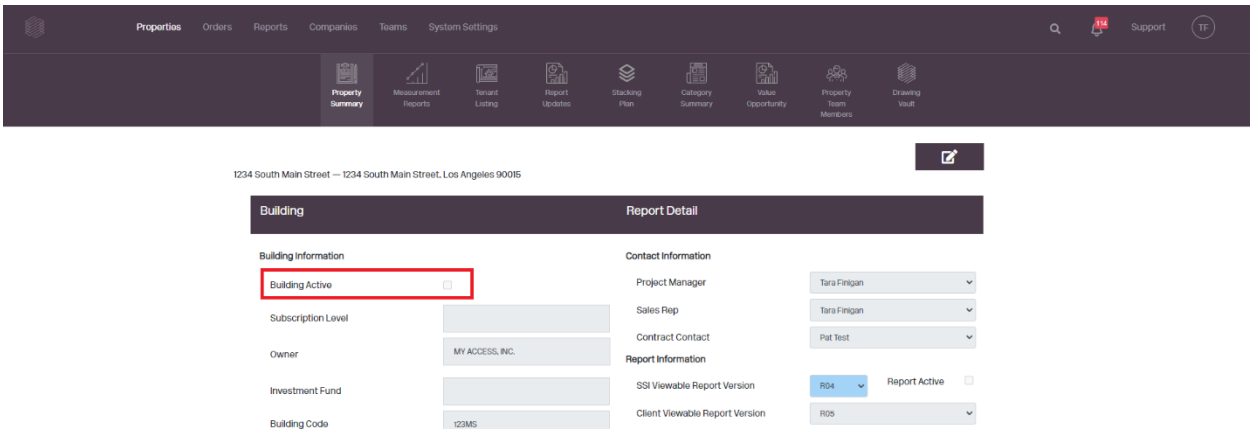
You can narrow your search by selecting a company or typing in an address or building name into the search bar.

Click on the property from the **Property Listing**.

Select **Property Summary** from the sub-navigation.

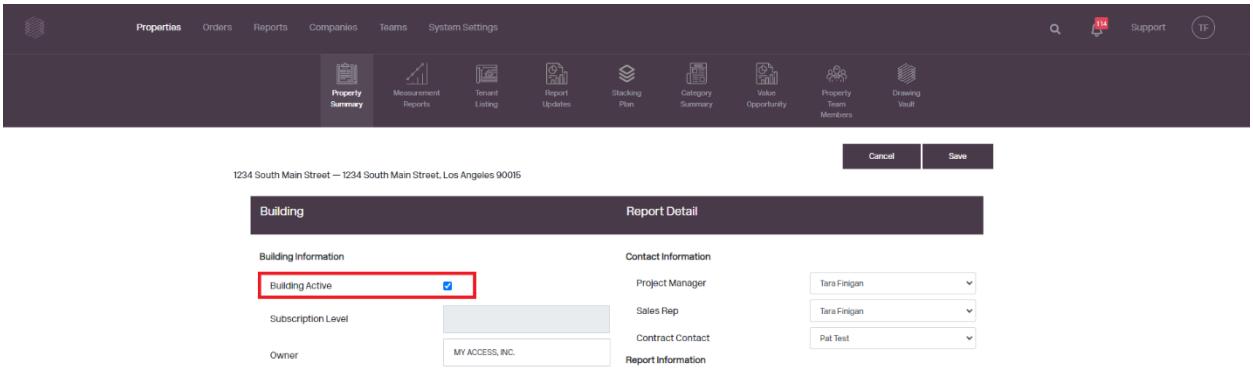


On the left side under building is the active field. If the box is not checked, the building is inactive.



NOTE: There is an active field under report detail. THIS IS NOT REGARDING THE BUILDING; THIS IS FOR THE REPORT VERSION DISPLAYED.

Click **Edit**. Click the **Active check box**.



Click **Save**.

The building is now active, meaning it can now be assigned to a user.

4.3.3 Setting Report Versions

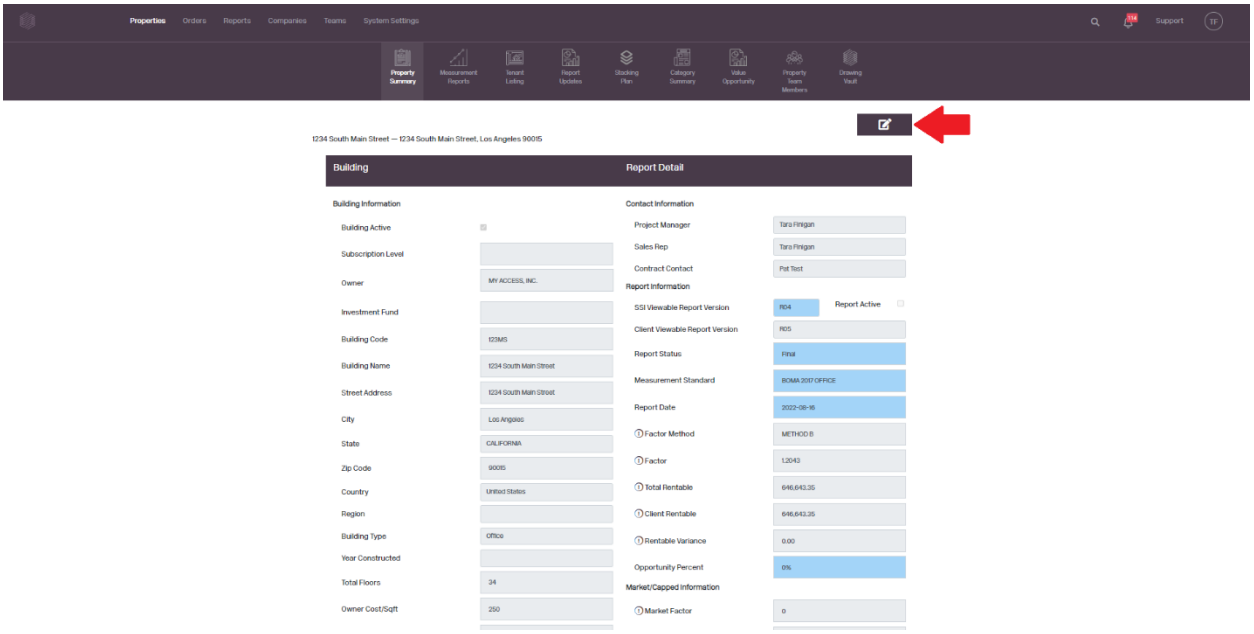
The Property Listing page displays the property in a blue highlight if the report version selected under SSI Viewable Report Version and the report version under Client Viewable Report Version **DO NOT** match. This is an indication that Q&C is needed for the building.

4.3.3.1 SSI Viewable Report Version

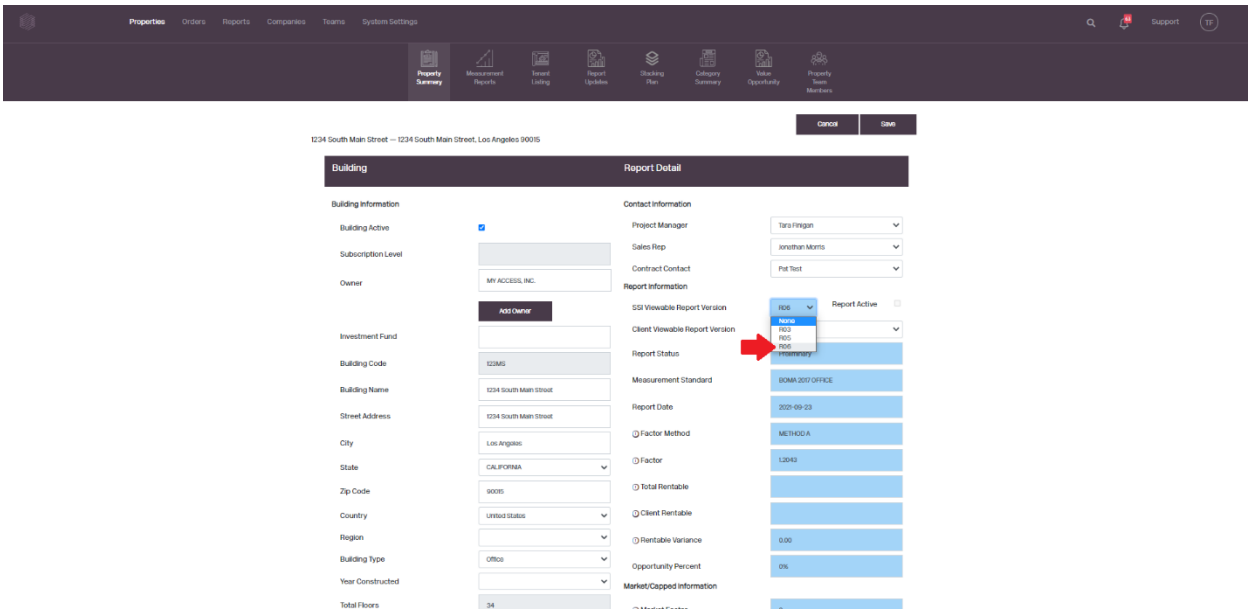
SSI Viewable Report Version drives the report data displayed in the Property Listing, Property Summary, and default Tenant Listing for **SSI ADMIN ONLY**.

SSI Viewable Report Version dropdown includes both **active and inactive report versions**. This allows for Q&C before showing a report to a client.

To set the SSI Viewable Report Version to Q&C a report, click edit.



Click on the dropdown.



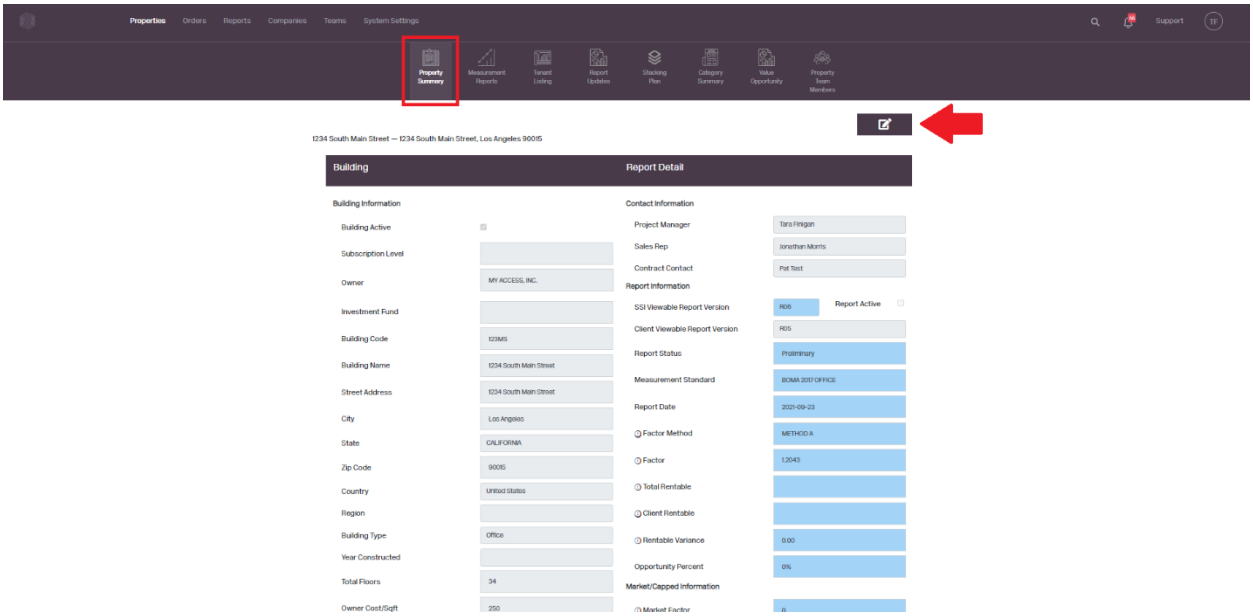
This dropdown includes both active and inactive reports. The dropdown displays inactive reports with a grey background. Once selected, the report active checkbox will be checked for active reports and unchecked for inactive reports.

Select the desired report and then click **Save**.

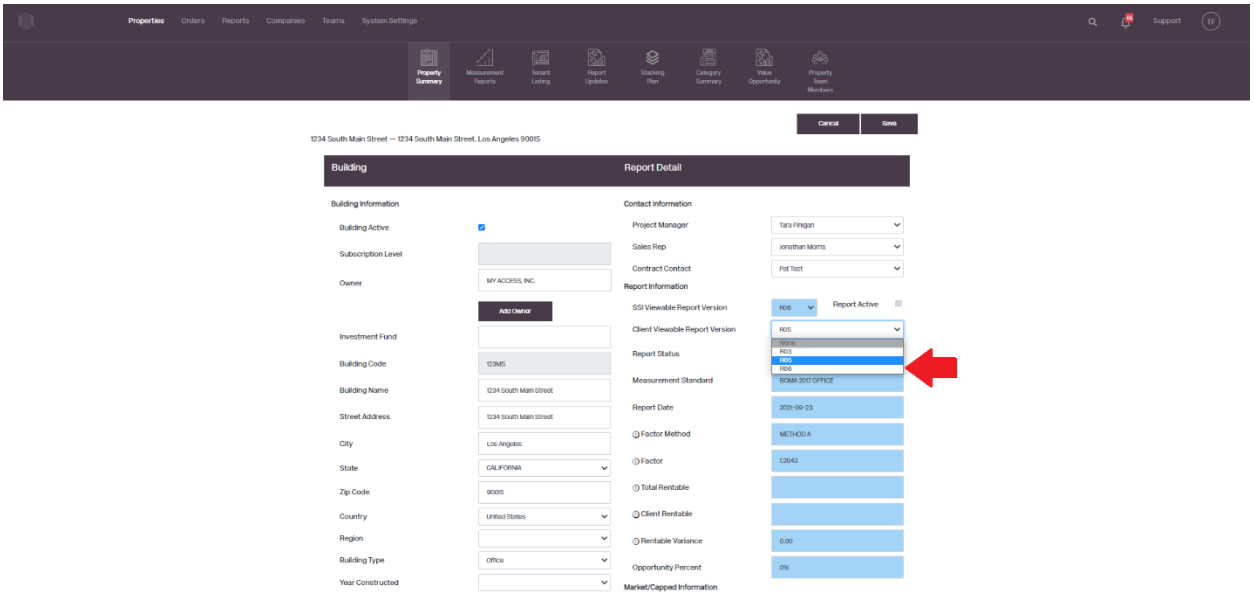
4.3.3.2 Client Viewable Report Version

Once the report has been Q&C'd, first set the report to active under the Measurement Reports page then set the Client Viewable Report Version.

Click on Property Summary. Click Edit.

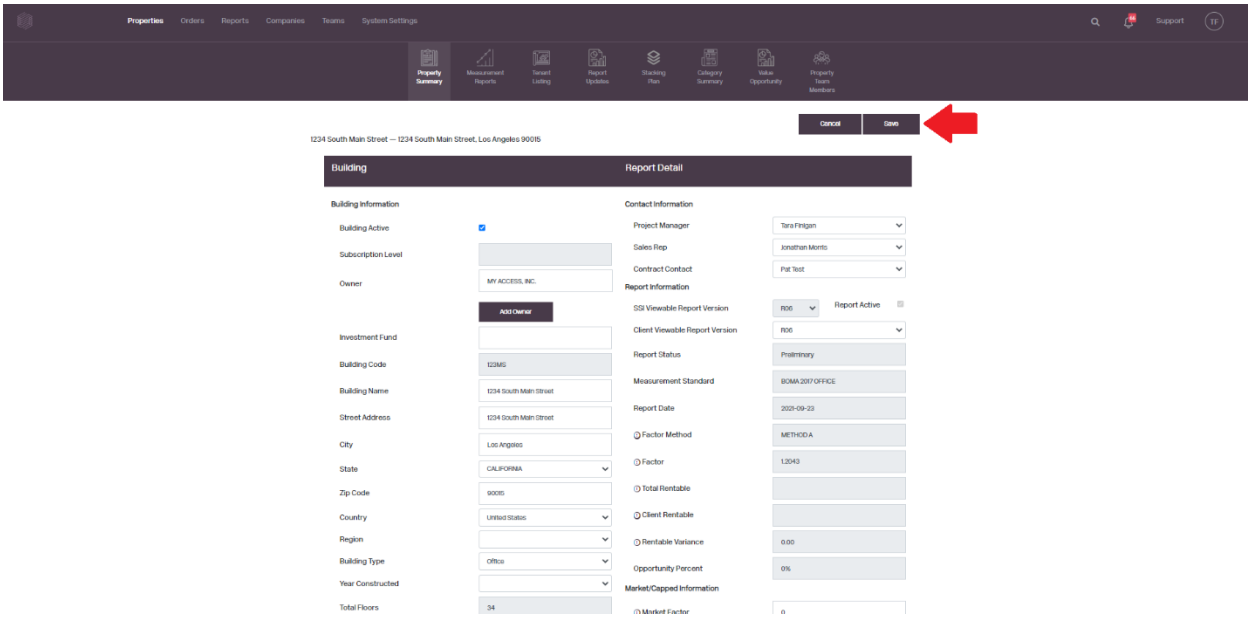


Click on the dropdown for Client Viewable Report Version; you will notice all active reports are listed.



Select the **desired report version**. This report version will display the data for a client in property listing, property summary, and tenant listing pages. They can still view the other active reports, however, this is the default data set they can see.

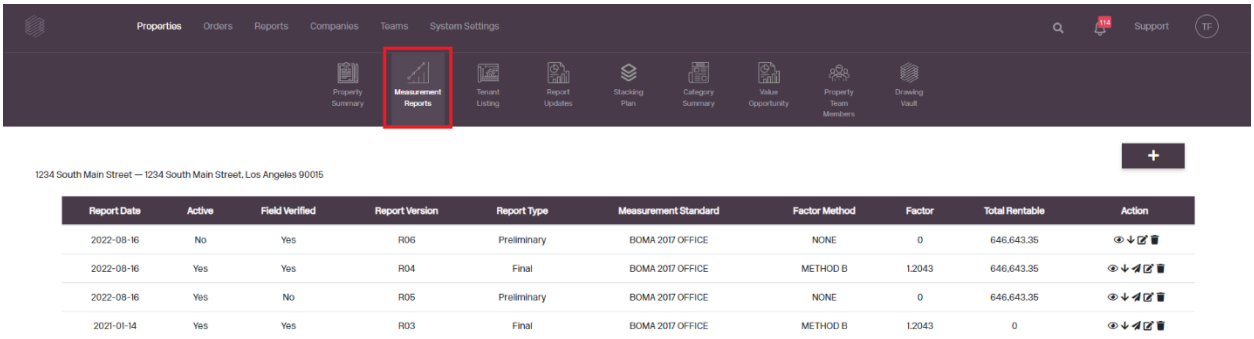
Once selected, as it should match the SSI Viewable Report Version, the blue highlight will no longer be visible.



Click **Save**.

4.4 Measurement Reports

All report versions that have been uploaded to TruSpace via the RP command in CAD are displayed here.



A building report's status can be found in the table. To edit this click the **edit icon** under the Action column.

NOTE: By changing a report's status from active to inactive, it will be directly reflected in the Property Summary page. The inactive reports will **ONLY** be displayed under the SSI Viewable Report Version dropdown.

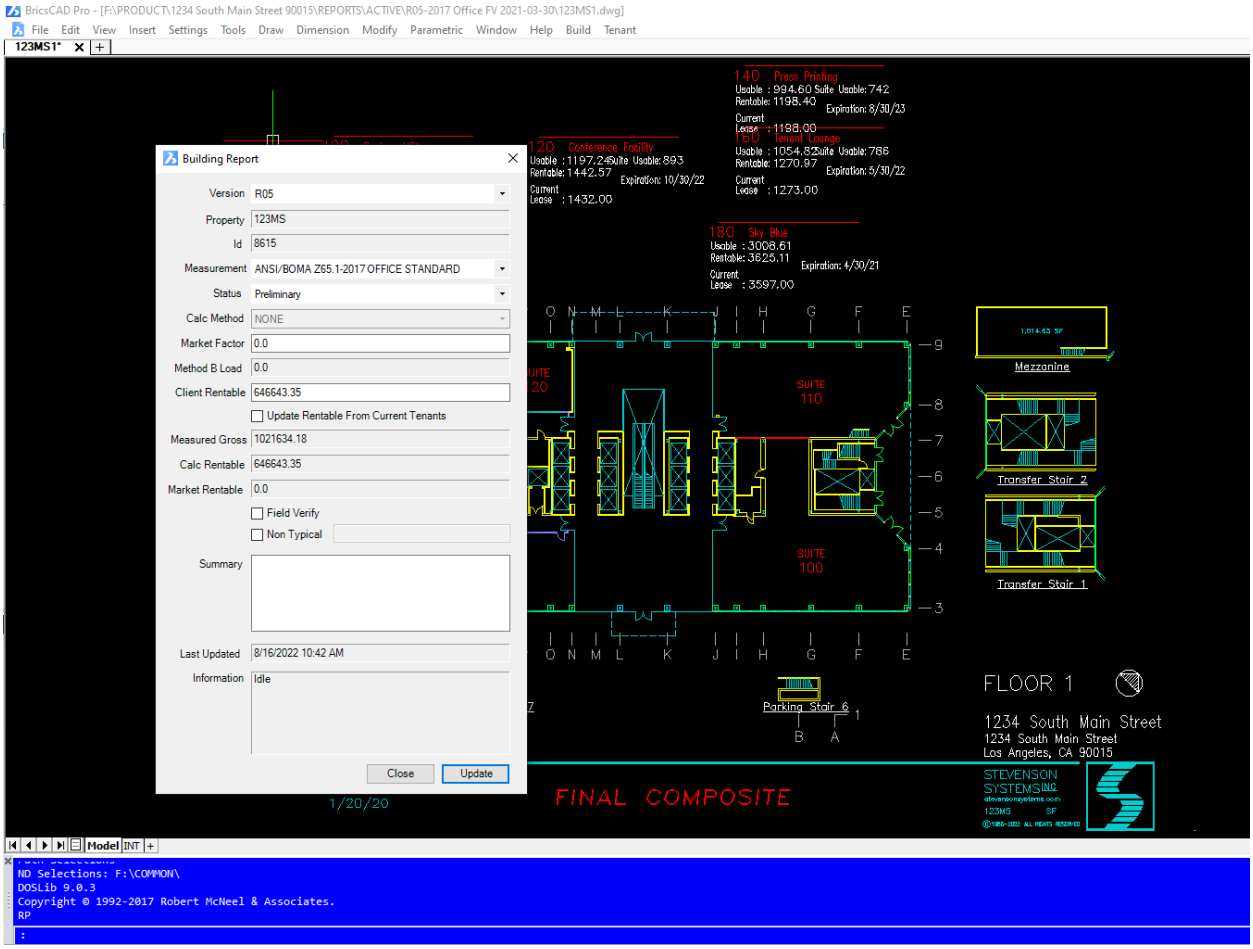
To view each individual building report, click on the **eye icon** under the **Action** column. To download the building report, click the download icon. To delete the report, click the trash icon.

4.4.1 Importing Report and Tenant Data into TruSpace

4.4.1.1 Measurement Reports

Open desired building in CAD.

Run the **RP Command**



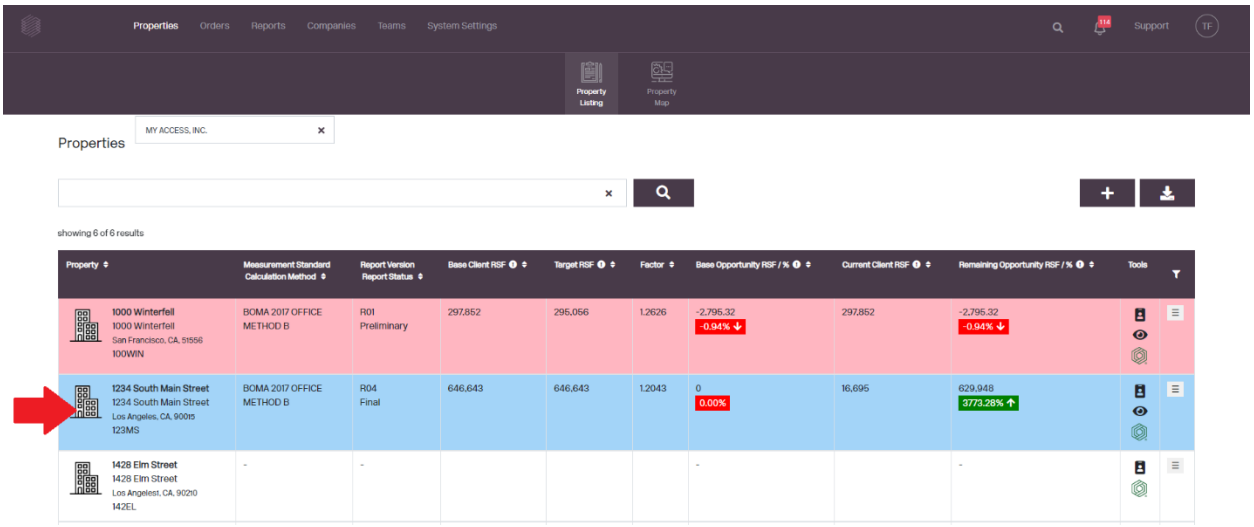
Click **Update**.

Note: You must run PT at this time for tenant data to also be displayed in TruSpace.

Log into TruSpace.

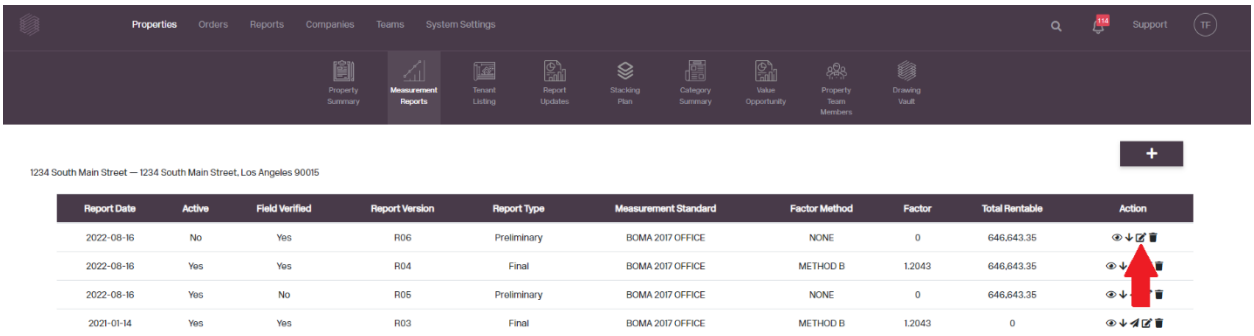
Go to **Properties**.

Search for the Property you ran the RP command for.

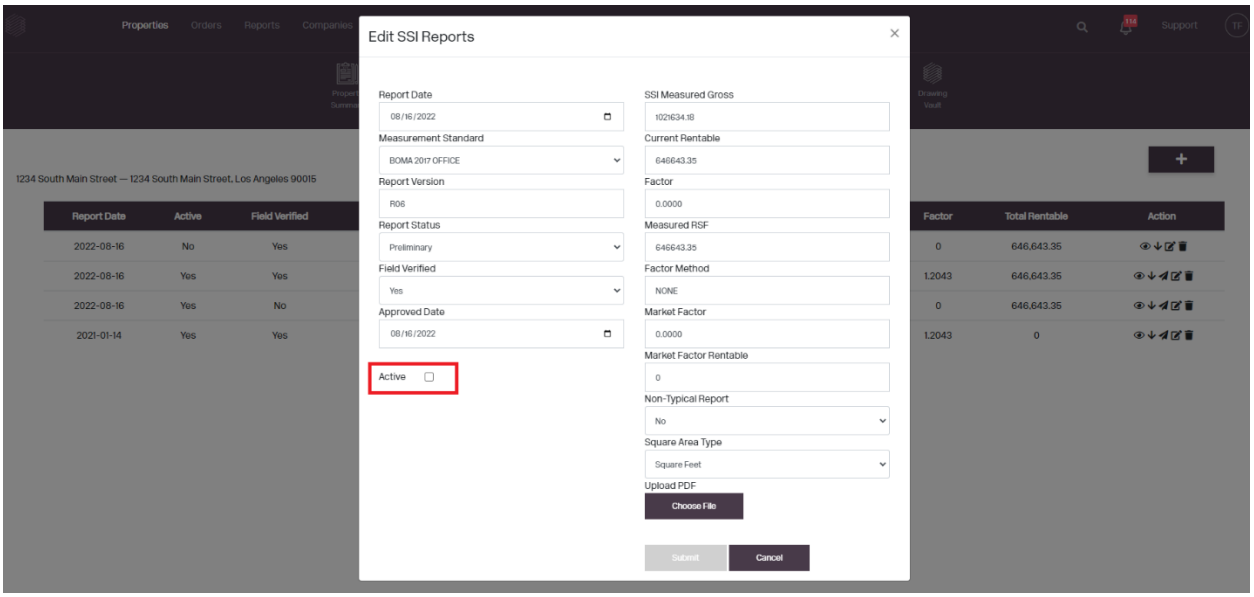


Click on the Property.

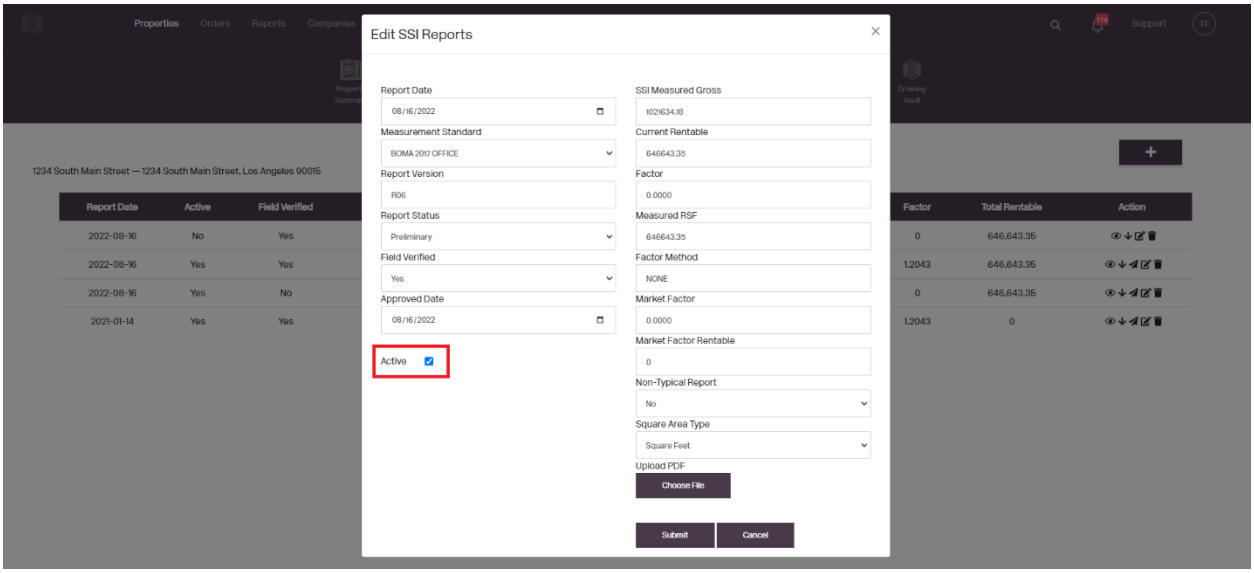
You are redirected to **Measurement Reports**.



Click on the **edit Icon** (see arrow in screenshot above).



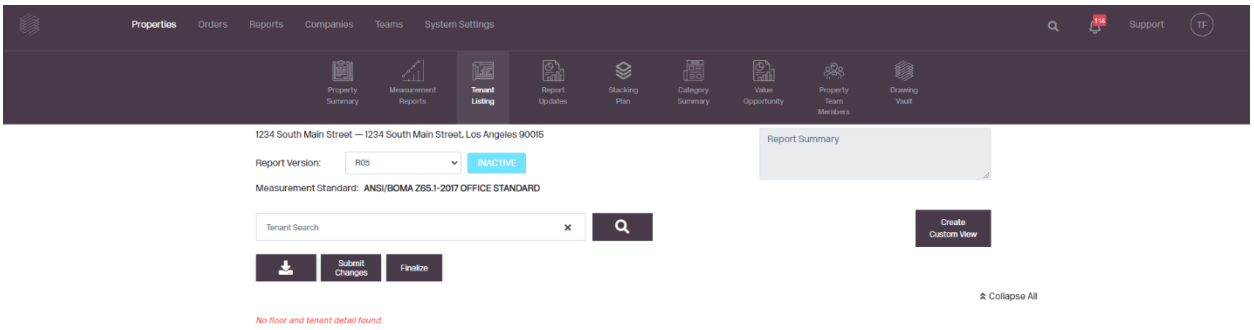
Check the **Active checkbox**.



Click **Submit**.

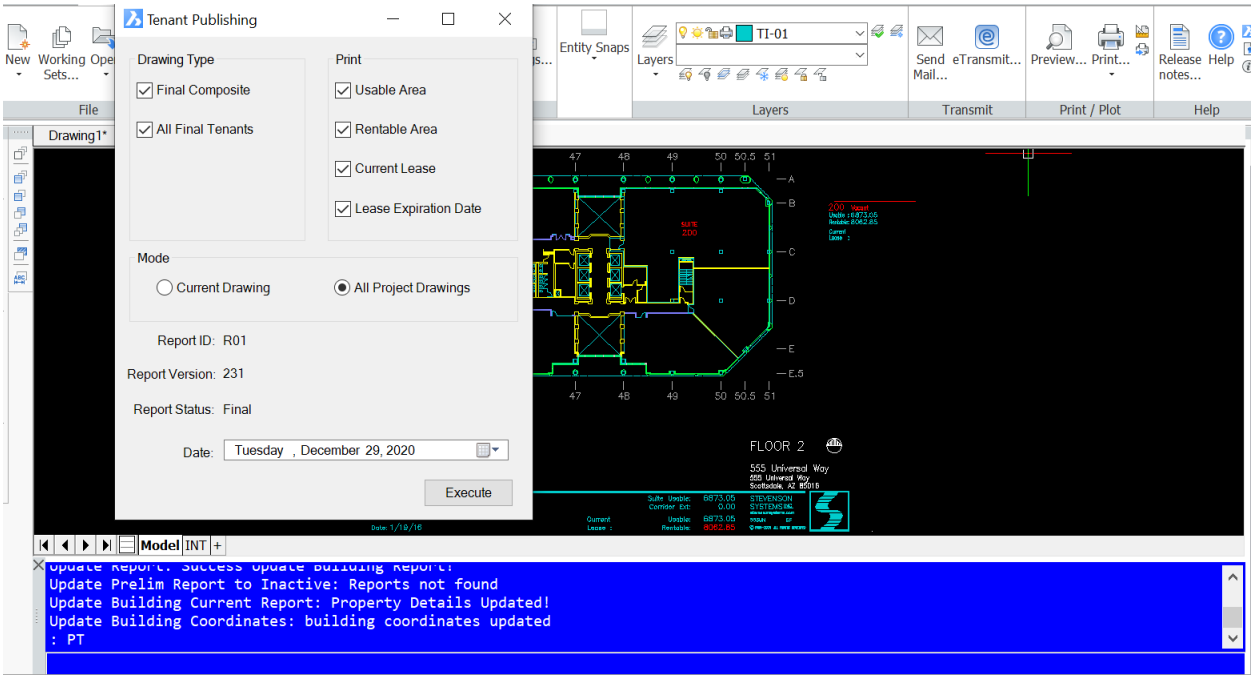
4.4.1.2 TENANT DATA

Click on the **Tenant Listing** tab.



Until you run the PT command in CAD, no data will be displayed here.

Open CAD. Run the PT Command.



Select the options selected in the screenshot above.

Click **Execute**.

Refresh the **Floors and Tenants** page in TruSpace.

Select the correct **Report Version** from the dropdown.

4.4.1.3 Uploading Market Rentable and Market Load

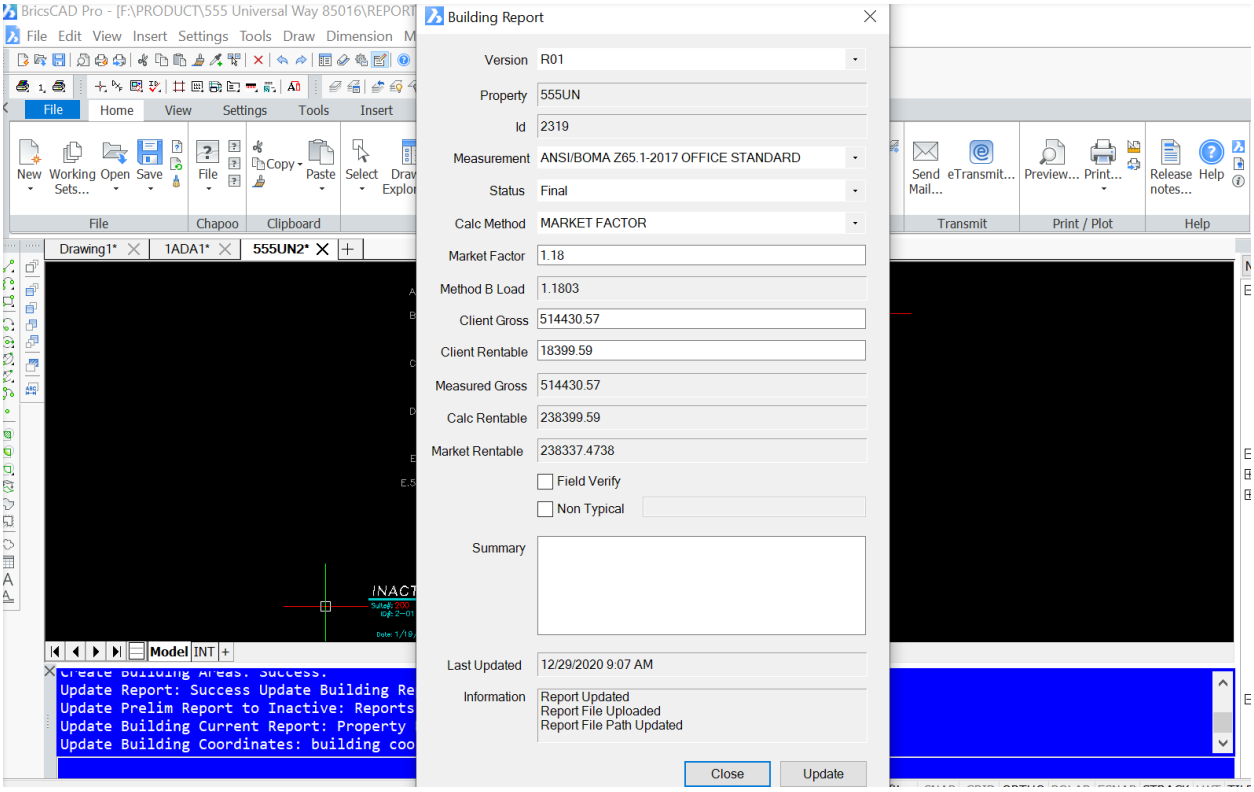
For reports with Tenant Market Rentable and Market Load, you will need to run the RP command again.

Run the **RP Command**.

Select Market Factor as **Calc Method**.

Input **Market Load Factor**.

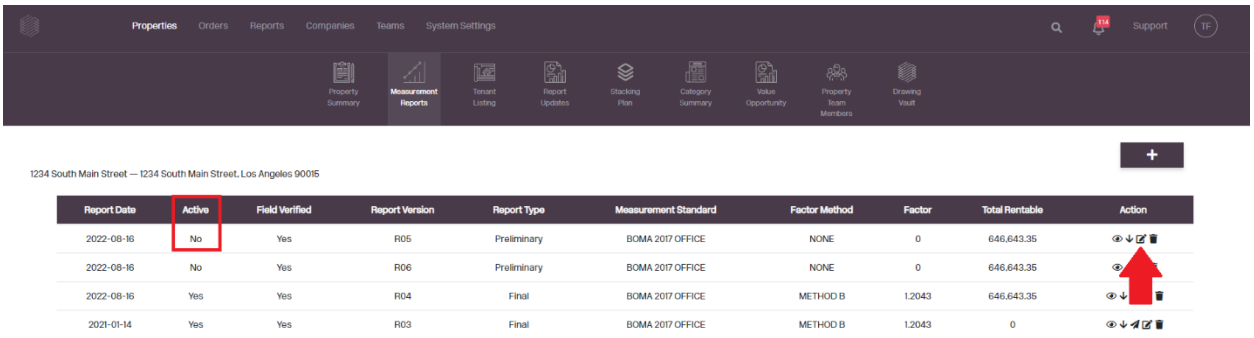
Click **Update**.



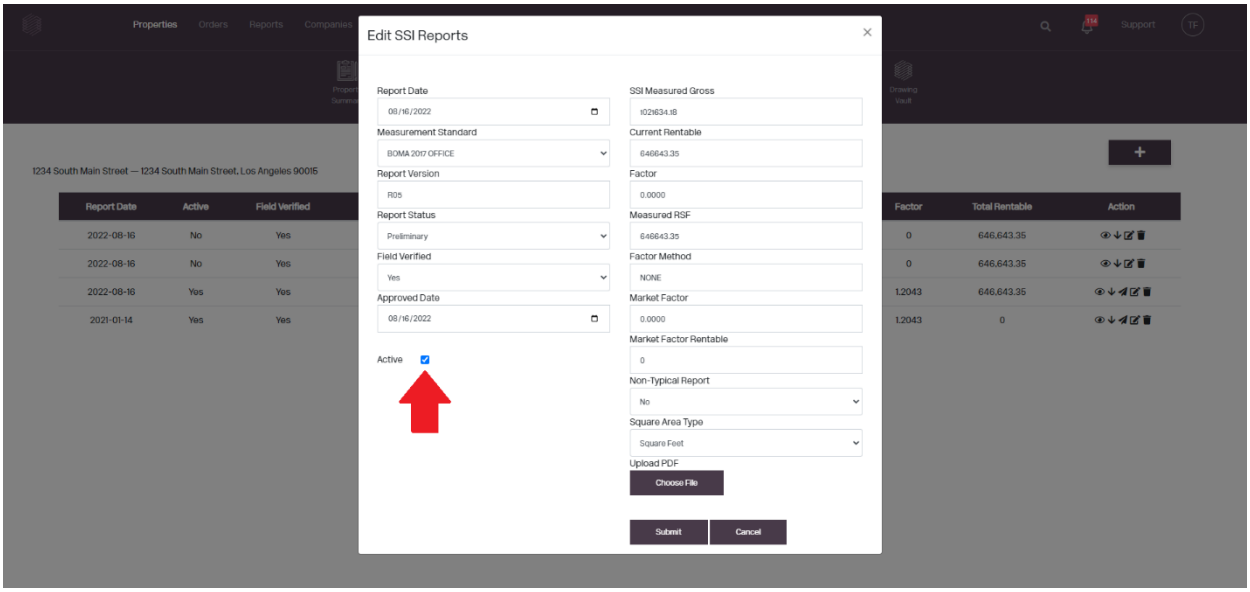
In TruSpace, Click on Properties. Select the specific property.

Click on **SSI Reports**.

The report ran in CAD will display as <u>inactive</u>. Click on the **Edit icon**.



Check the **Active** checkbox.



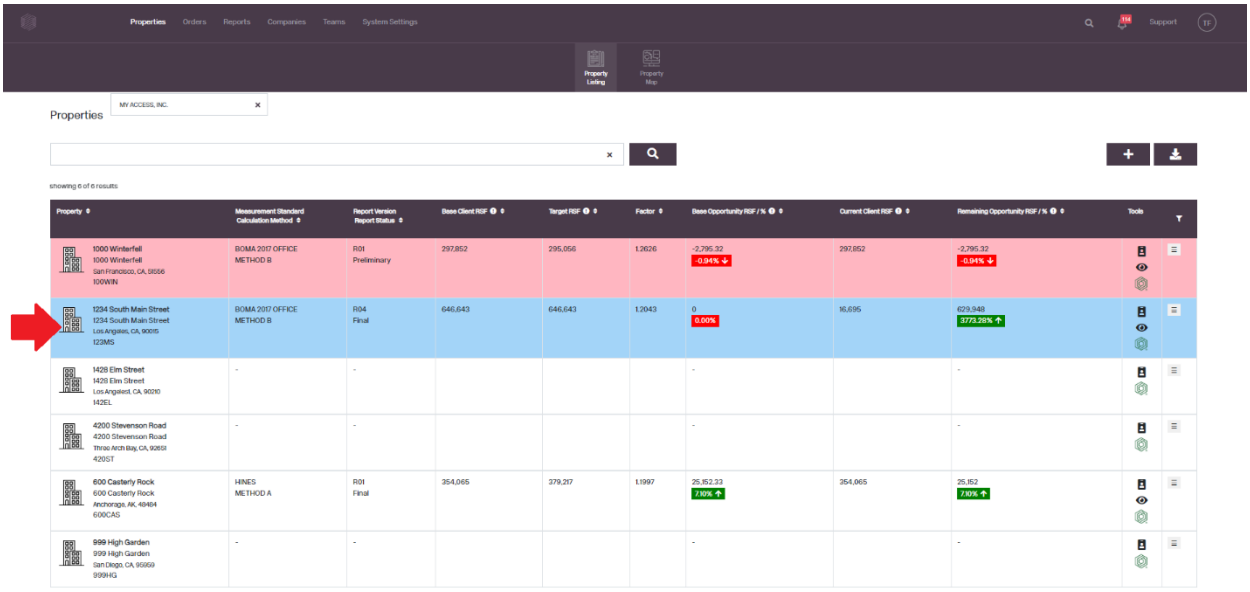
Click **Submit**.

4.4.2 Activating Measurement Reports

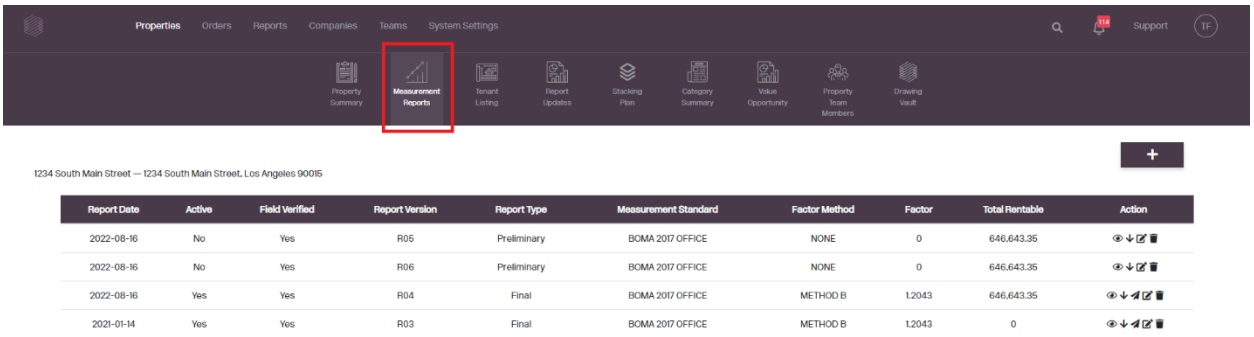
Activating a Measurement Report can only be done under the Measurement Reports tab. You MUST set the desired report as the SSI Viewable Report Version and Client Viewable Report Version for TruSpace to accurately display the data.

To activate a report, click on the **Properties** tab.

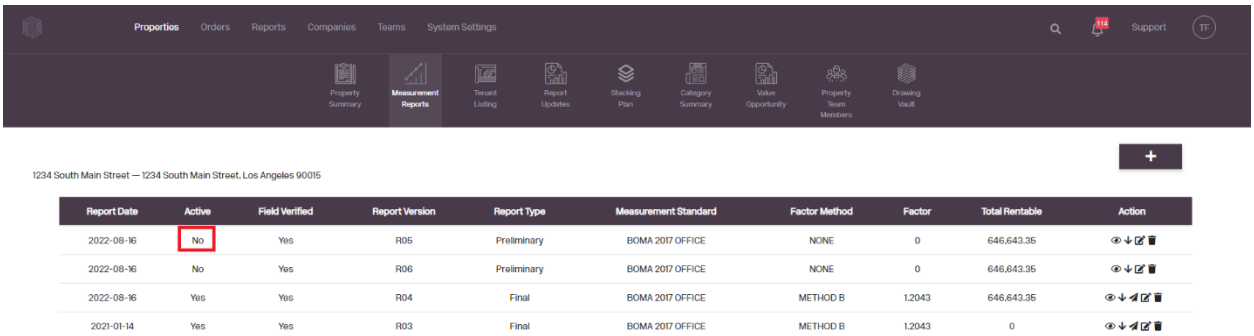
Select the desired property.



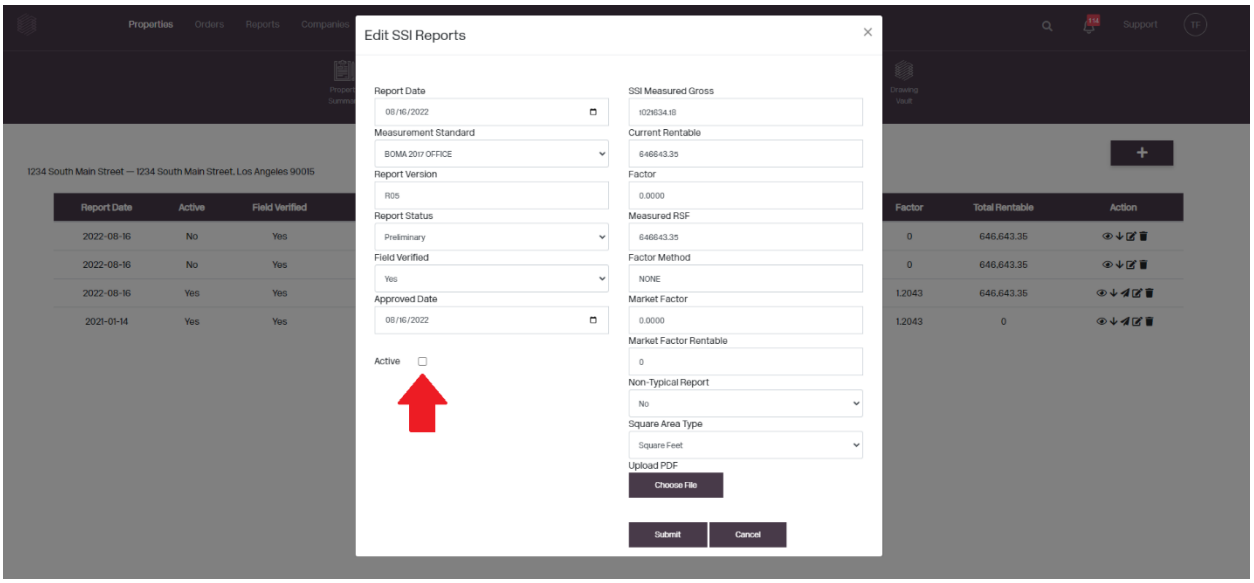
You are redirected to the **Measurement Reports** tab.



You will notice the active field for the report will say no.

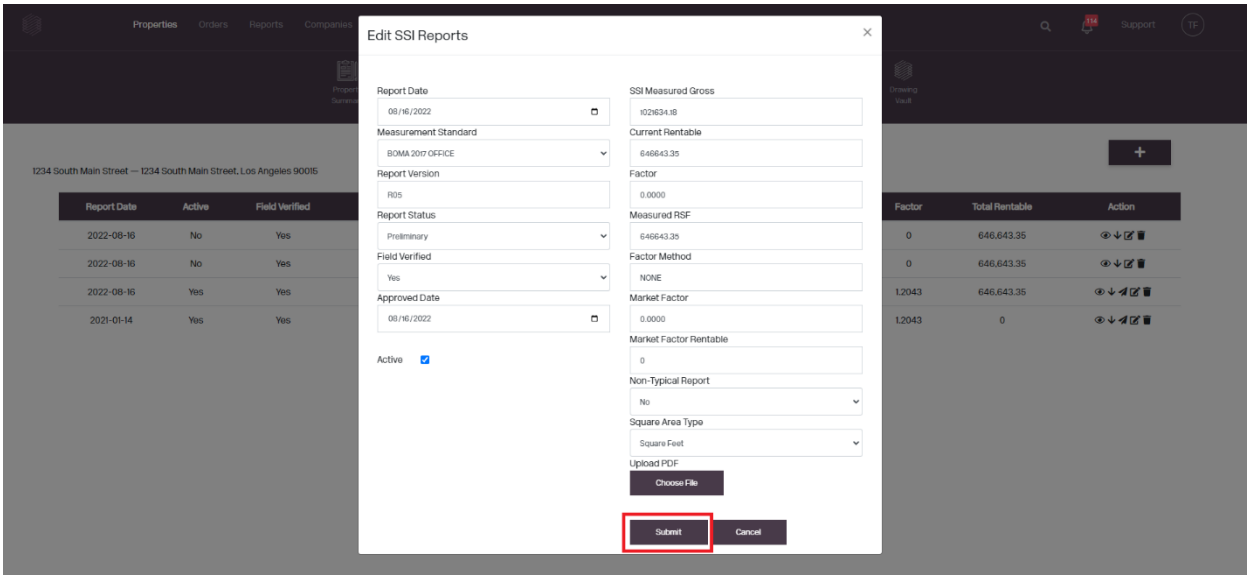


Click on the **edit icon** under Action.



To activate the report, click on the **Active** checkbox.

To deactivate the Report, uncheck the **Active** checkbox.



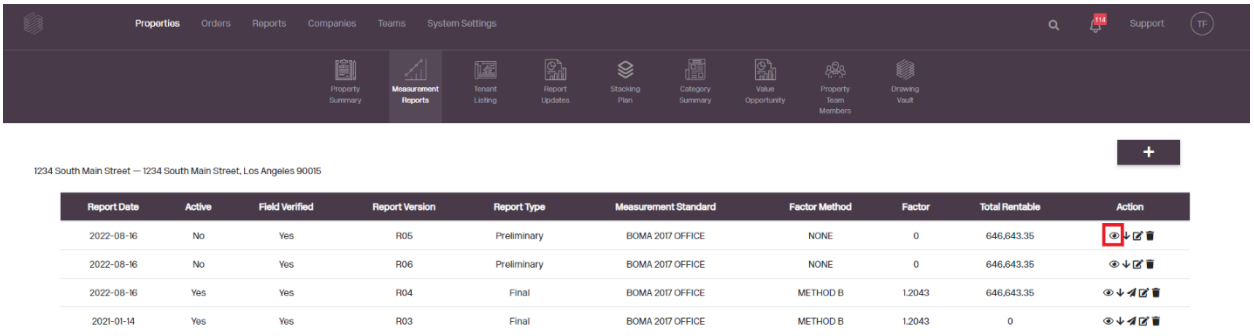
Click **Submit**.

ONLY active report versions are displayed in the Client Viewable Report Version dropdown in the Property Summary tab. Be sure to set the Client Viewable Report Version to the correct active report.

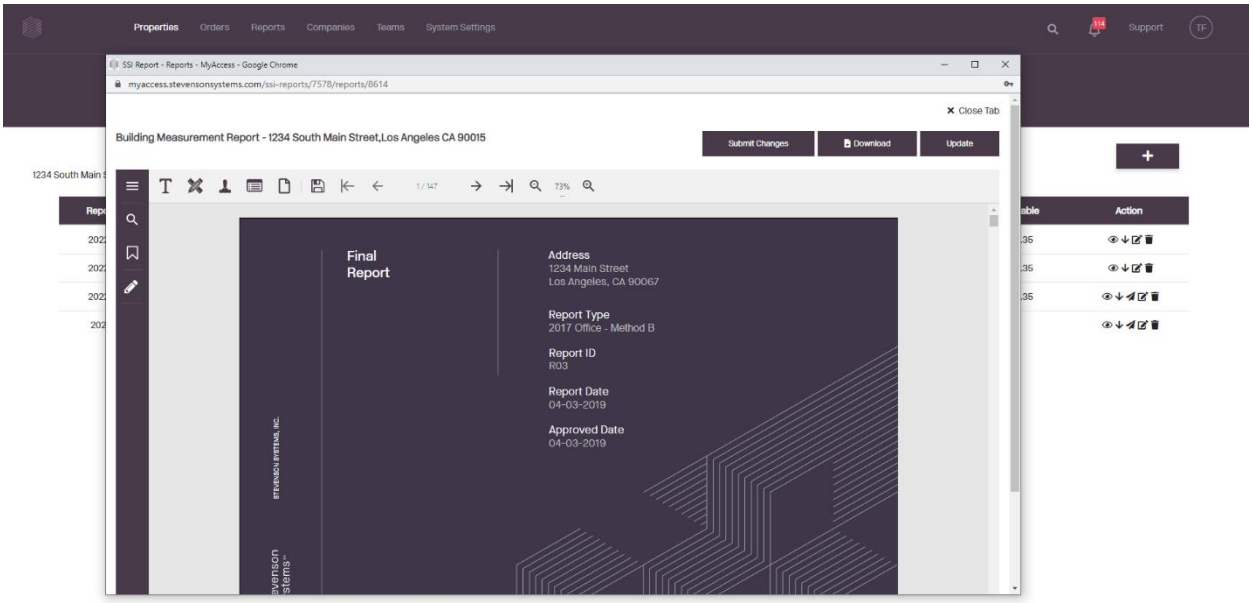
4.4.3 Viewing Measurement Reports

Viewing a Measurement Report is done via the **Measurement Reports** tab.

Click on the **eye icon or the report in the listing**.



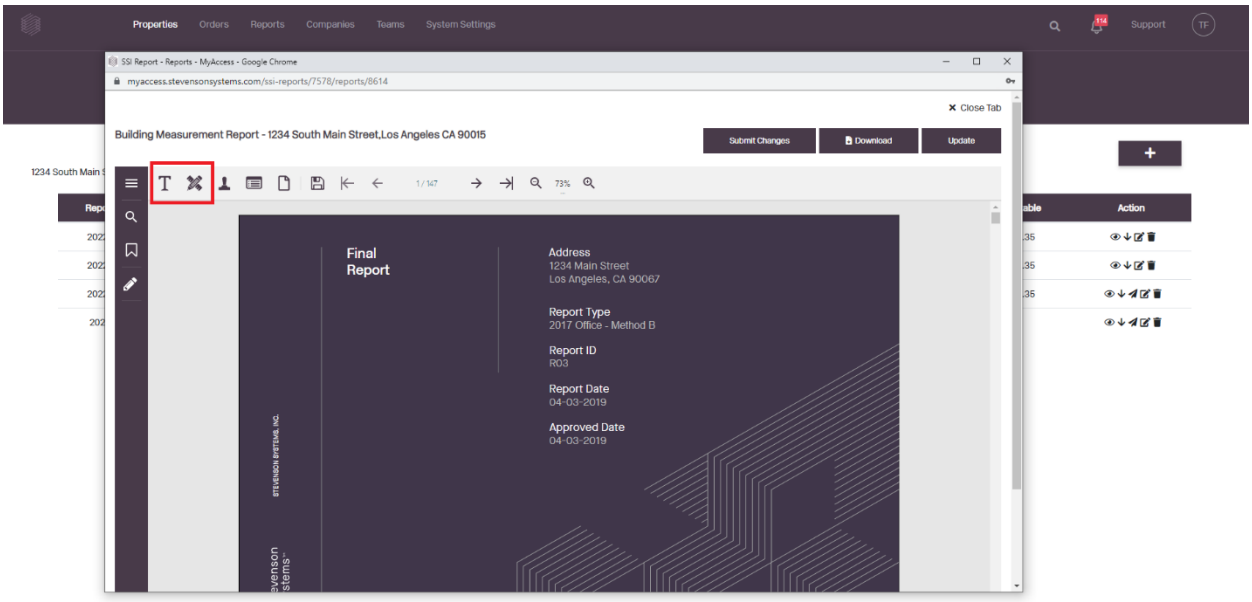
The selected measurement report is displayed in a new window. Here you can annotate directly within the report or download the report. You can then submit changes or finalize on behalf of a client.



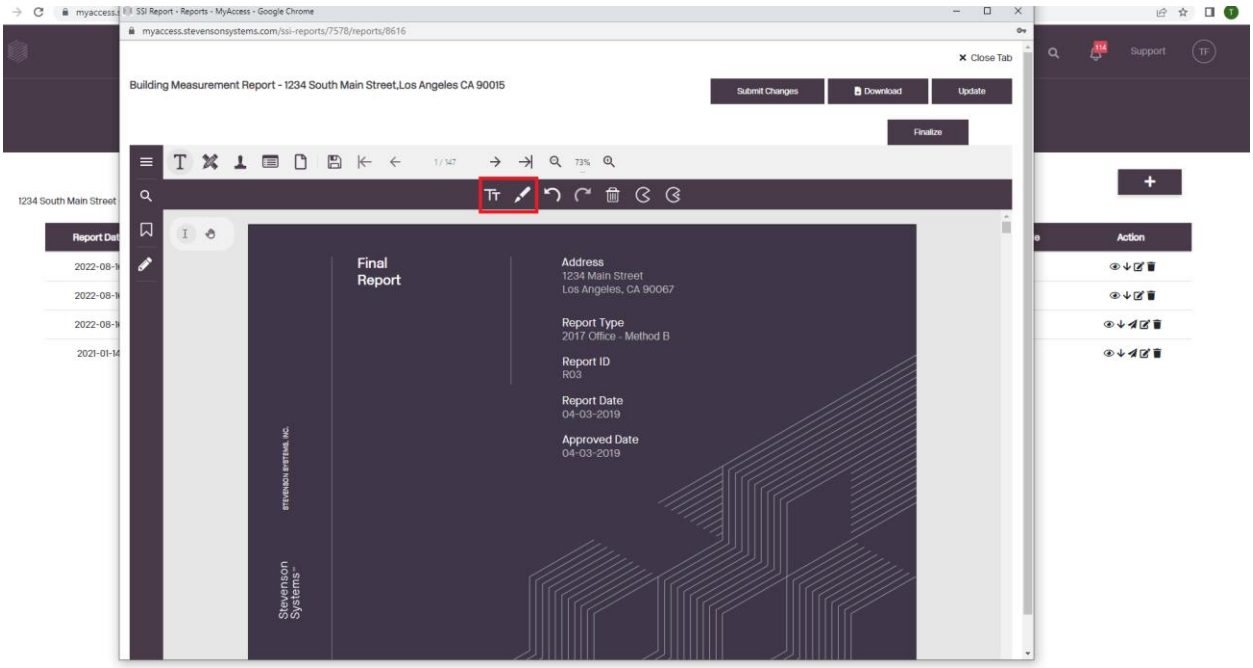
4.4.4 ANNOTATING A REPORT

Annotations can be done directly within a report.

Click on one of the annotation tools at the top to begin annotating.

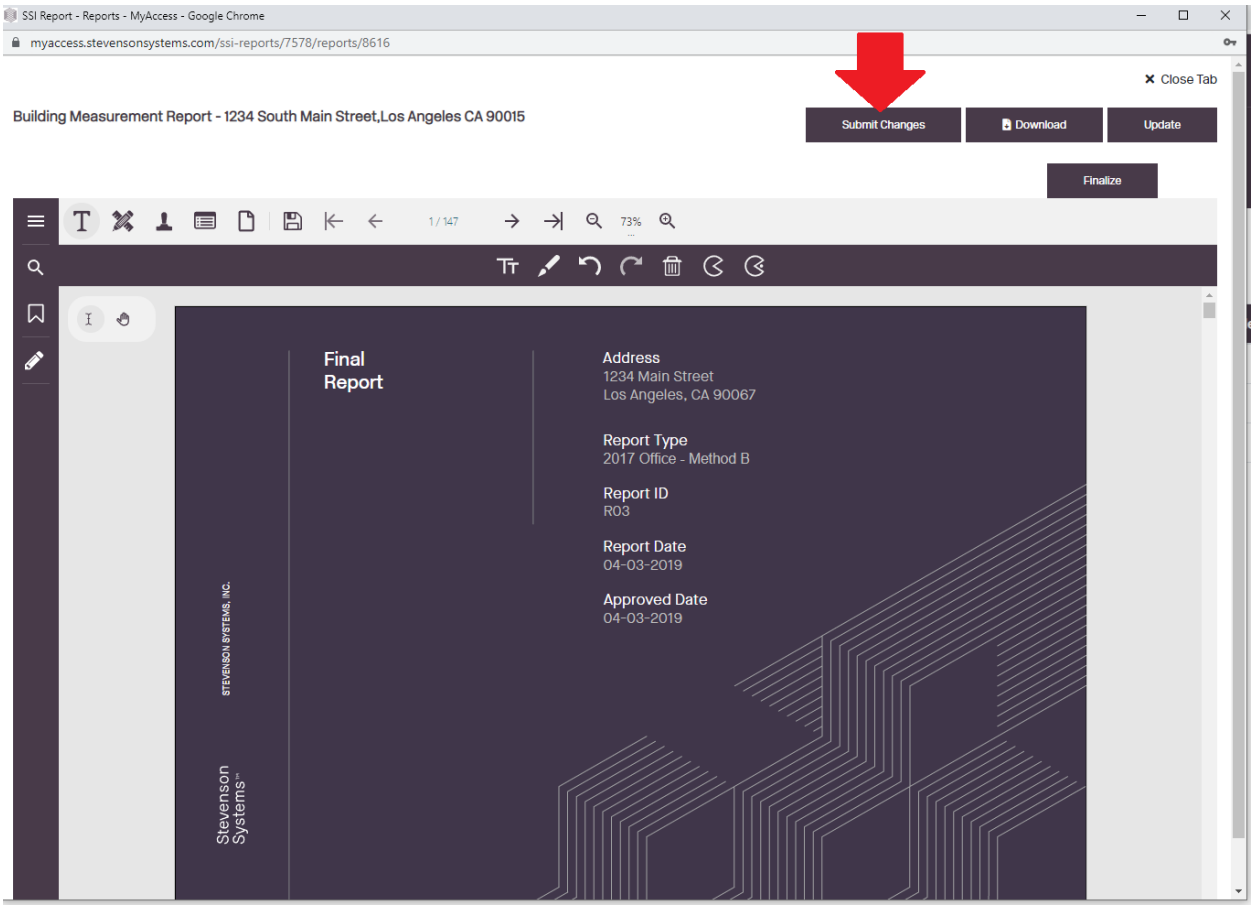


Select either the text or pencil icon to use for annotations.



Enter your annotations directly within the report.

Once completed with your annotations, click **Submit Changes** or **Update** at the top of the page.

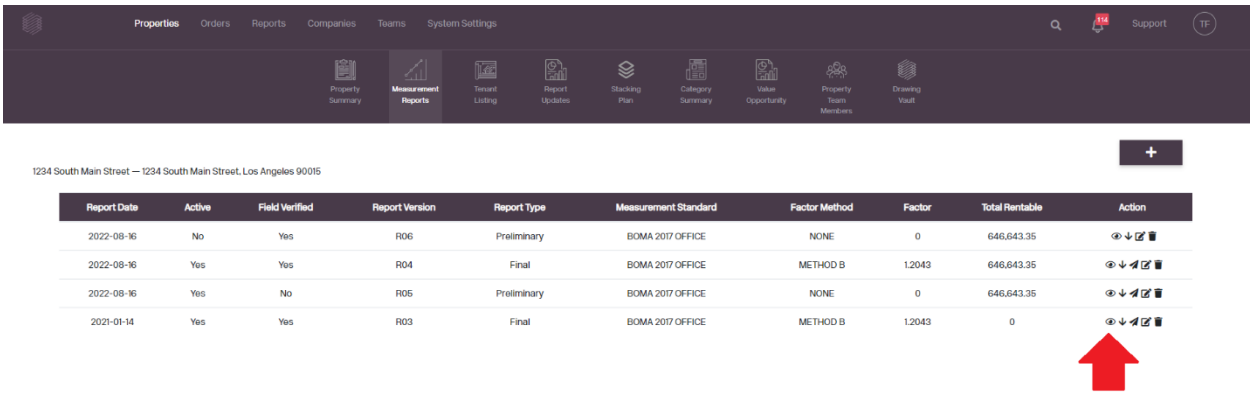


NOTE: If you return to TruSpace at any point while making annotations without clicking **Update**, your annotations will be lost.

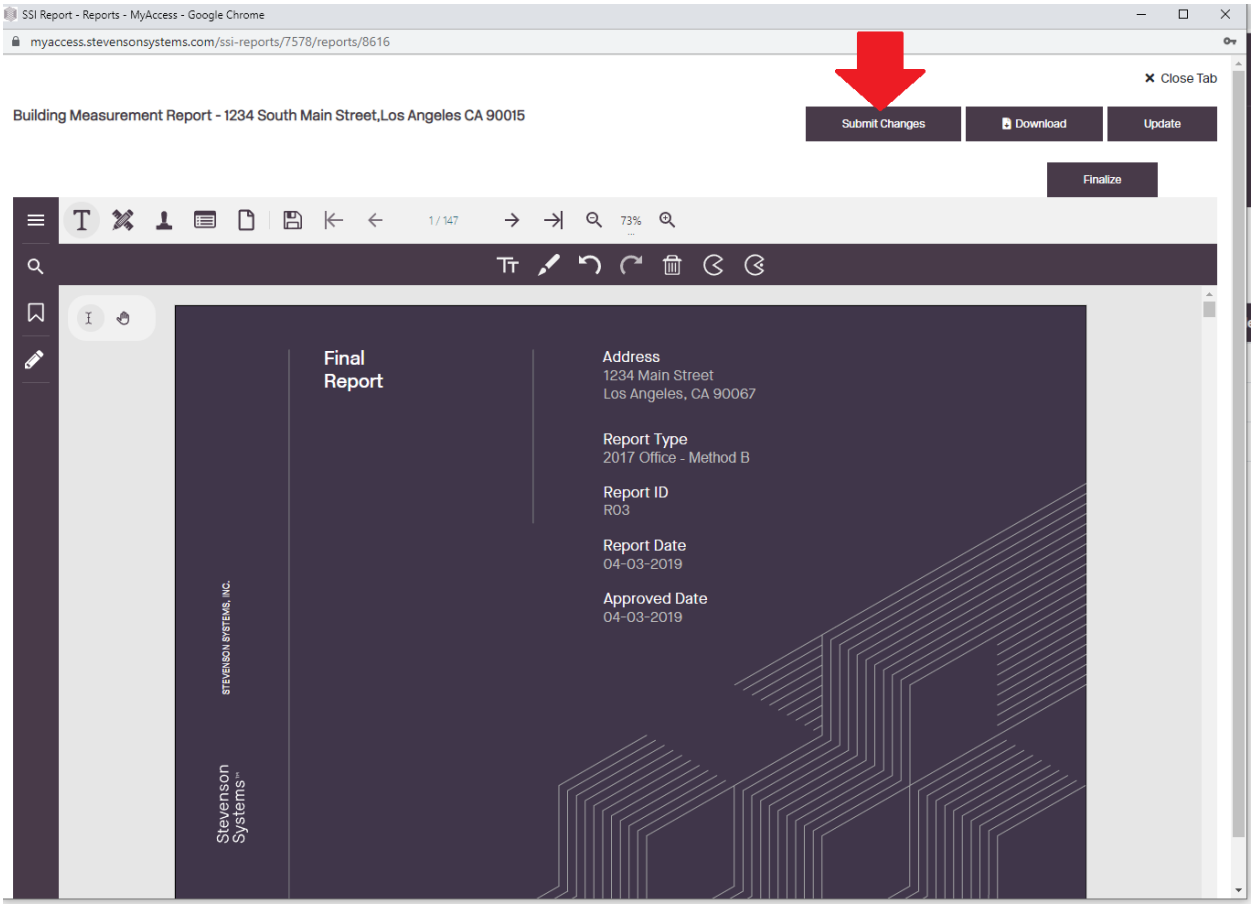
4.4.5 Submitting Changes to a Measurement Report

Whether you decide to annotate directly within the report or download as a PDF and annotate outside of TruSpace, go to the **Measurement Reports** page to submit the changes for report modifications to be made.

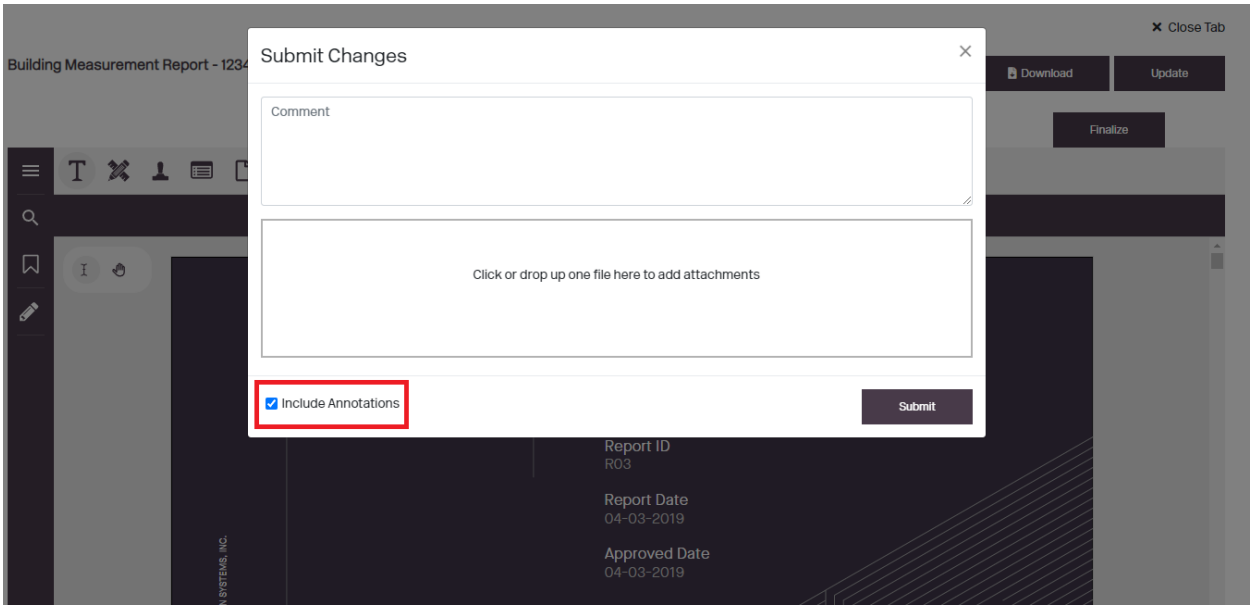
Click on the report you are submitting changes to.



Click **Submit Changes**

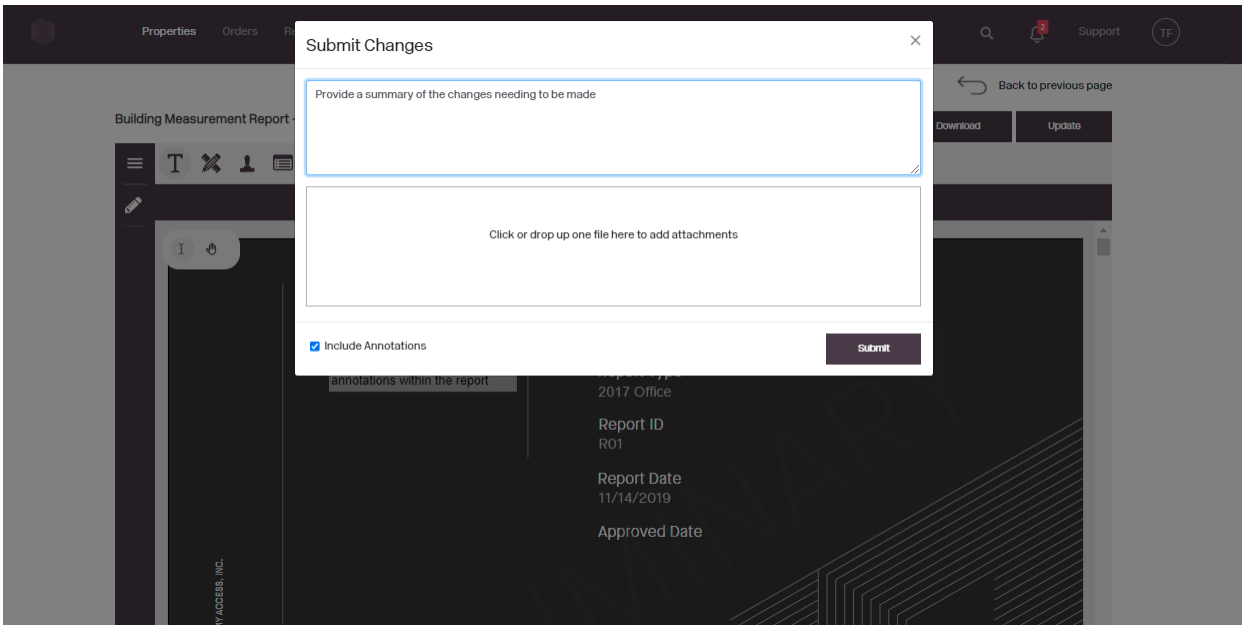


If you are annotating directly within the report, make sure that the include annotations box is checked. This will include the annotations as a PDF within the Report Modification order.



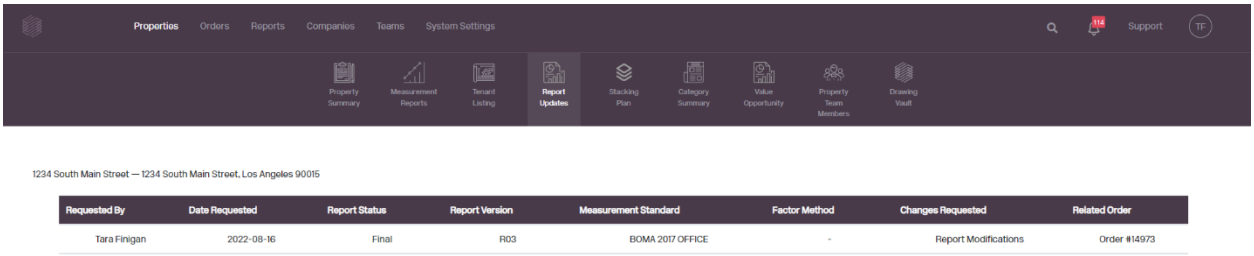
You can enter additional information into the comments section provided. Additionally, if you have elected to download the report to do annotations outside of TruSpace, you will attach the file here

under the attachment box. Either drag and drop the file or click into the box to select the file from your folders.

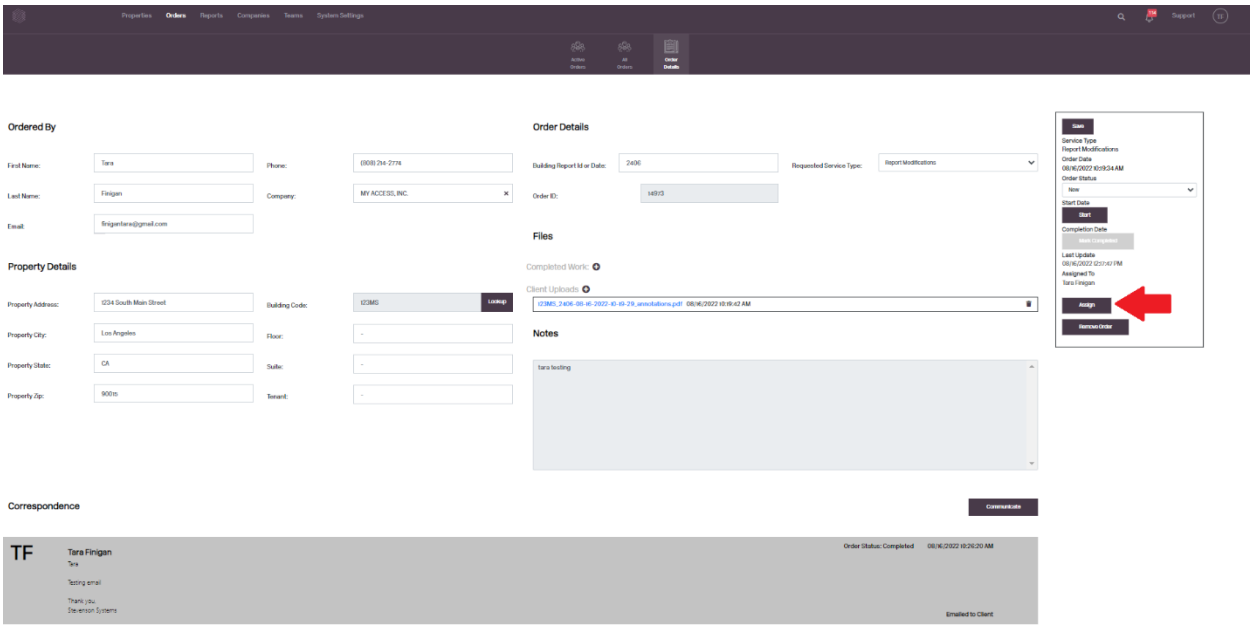


Once completed, Click **Submit**.

You will be redirected to the **Report Updates** page. The item in the list is a summary of the report modification made.



By clicking on the item in the list, you will be redirected to the related order.

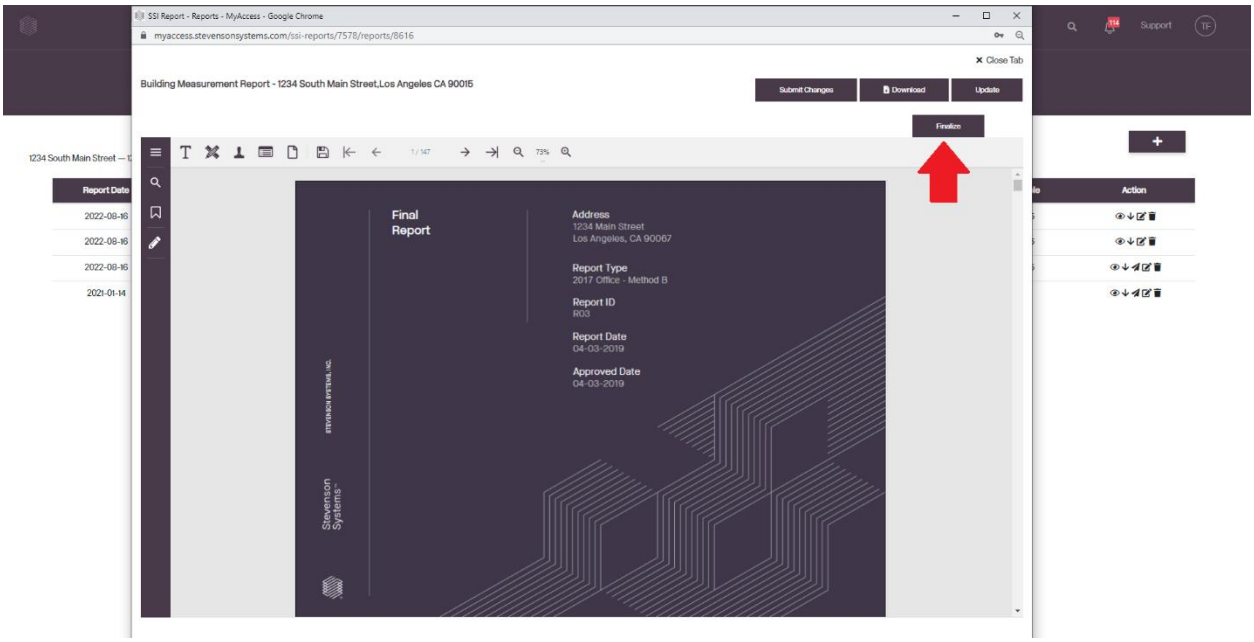


Use the **Assign** button to assign the order to whomever is doing the report modifications.

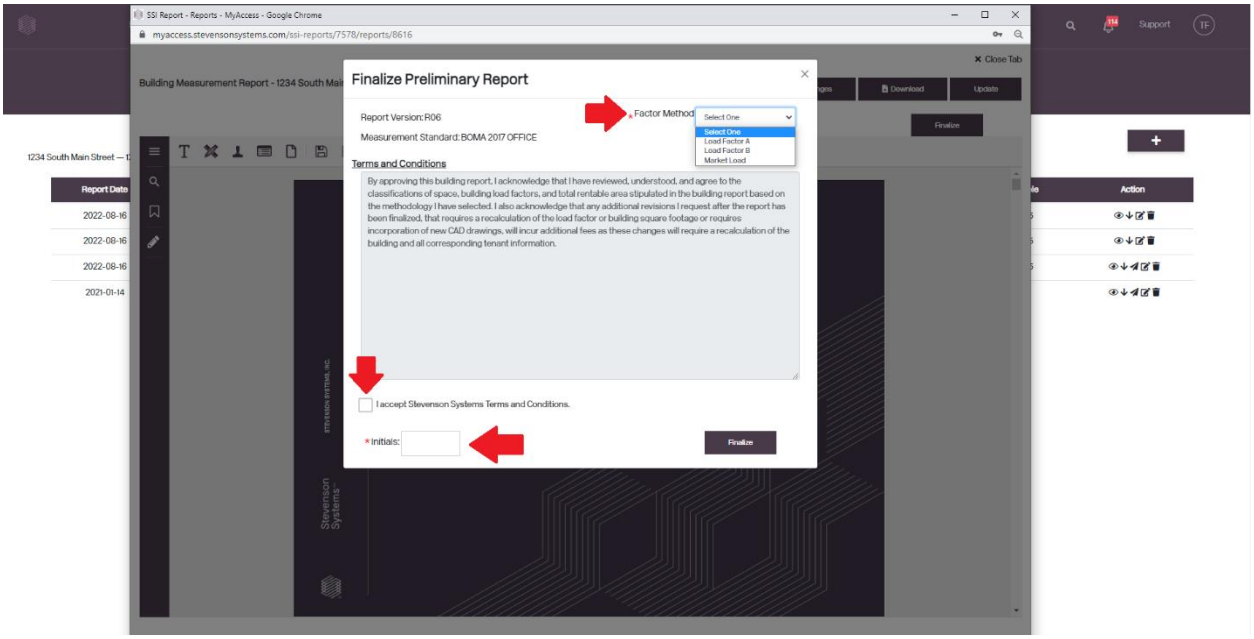
4.4.6 Finalizing Measurement Report

You may finalize a report on behalf of a client, if necessary.

From the Measurement Report window, click **Finalize**.

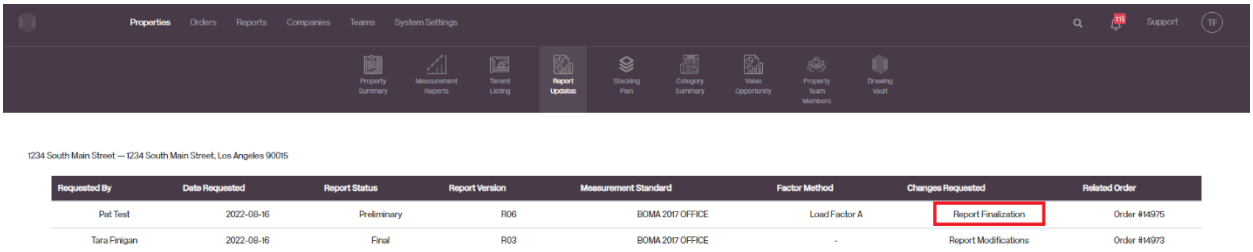


Select a **Load Factor**. Accept the **terms and conditions** and enter your **initials**.



Click **Finalize**.

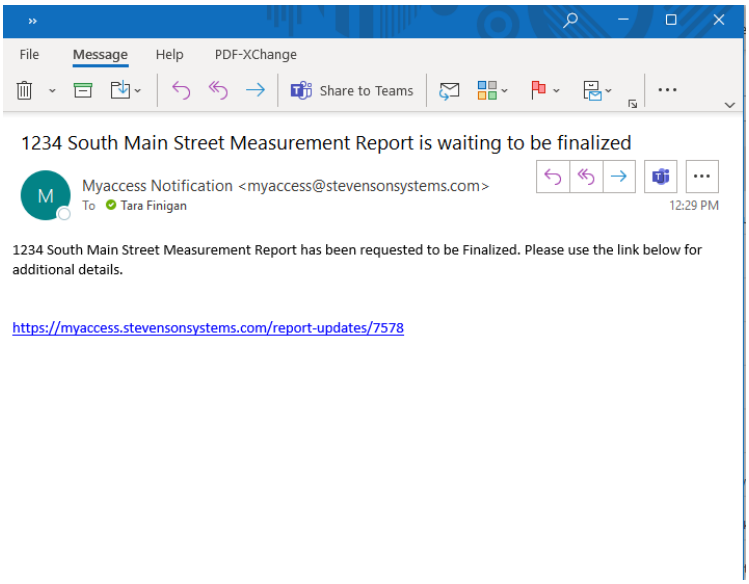
You are redirected to the Report Updates page. Note that the Changes Requested field denotes Report Finalization.



1234 South Main Street — 1234 South Main Street, Los Angeles 90015

Requested By	Date Requested	Report Status	Report Version	Measurement Standard	Factor Method	Changes Requested	Related Order
Pat Test	2022-08-16	Preliminary	R06	BOMA 2017 OFFICE	Load Factor A	Report Finalization	Order #14975
Tara Finigan	2022-08-16	Final	R03	BOMA 2017 OFFICE	-	Report Modifications	Order #14973

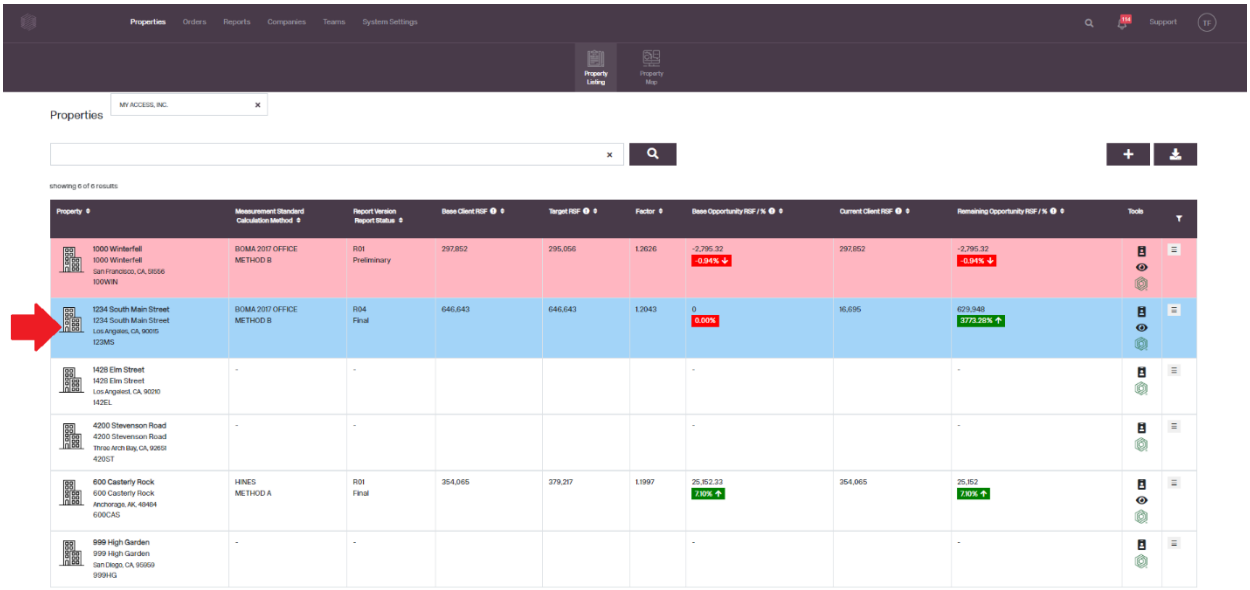
The Project Manager will also receive an email stating that the report is ready to be finalized.



4.4.7 Download Measurement Reports

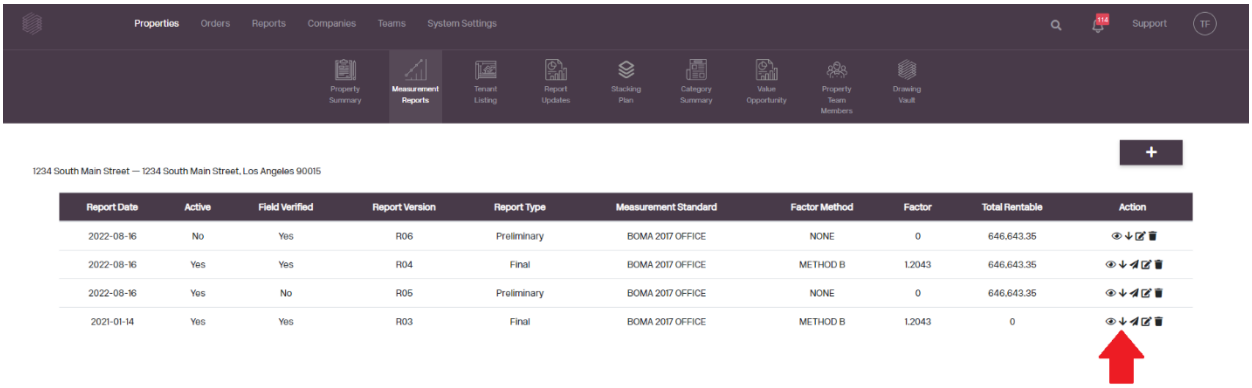
There are two ways to download a Measurement Report.

Select a property from the Property Listing page.



You are redirected to the **Measurement Reports** page.

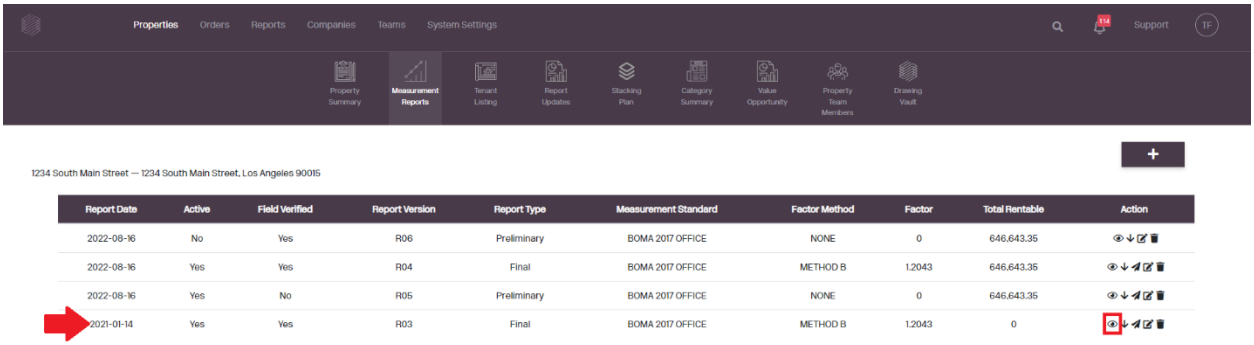
Under the Action column, there is a download icon.



Click on the **download icon**.

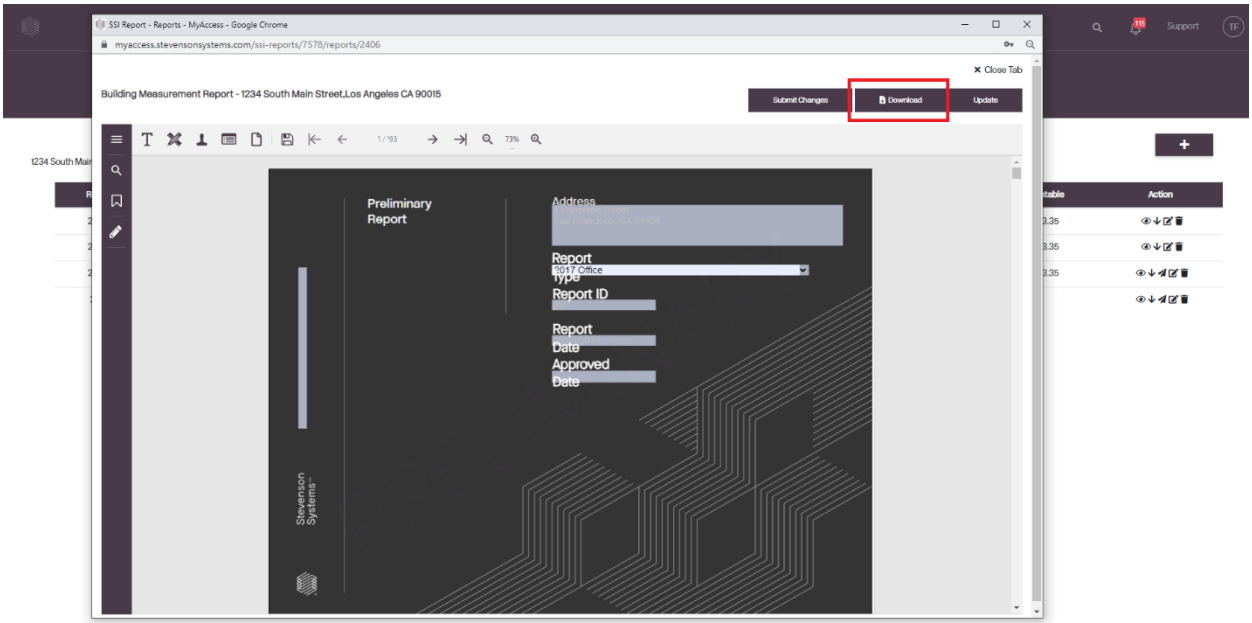
The report is downloaded as a PDF.

Additionally, you can click on the **eye icon** or the **report in the listing** to view the report.



The measurement report is displayed.

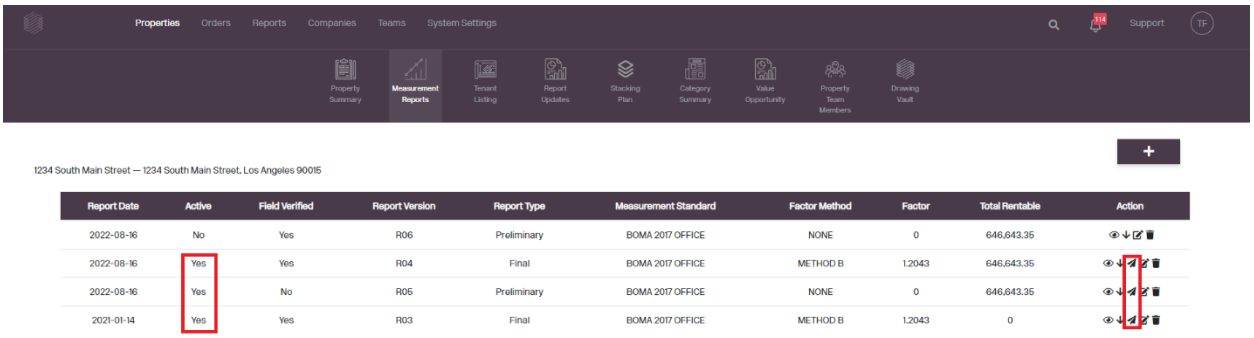
Click the **Download** button from the top of the page.



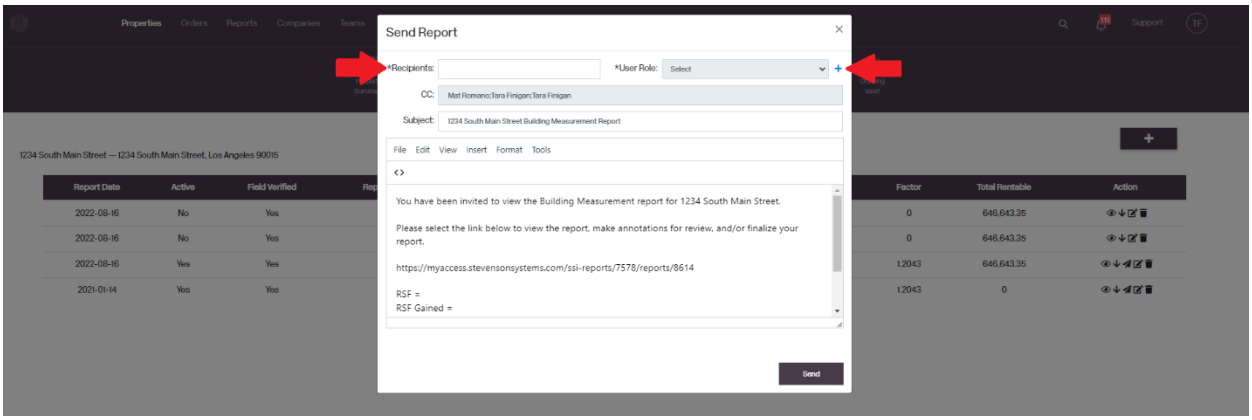
The report will be downloaded as a PDF.

4.4.8 Sharing Measurement Reports

Sharing a measurement report can be done via the **Measurement Reports** tab. First confirm that the report is **Active**.



Once confirmed, click on the **Share** icon.



Enter the email address of the recipient you are wanting to share the report with. If the user is already in our system, the user role will be prepopulated for you. If this is a new user, select a user role from the User Role dropdown.

To add additional recipients, click the **+ icon** to the right of the recipient.

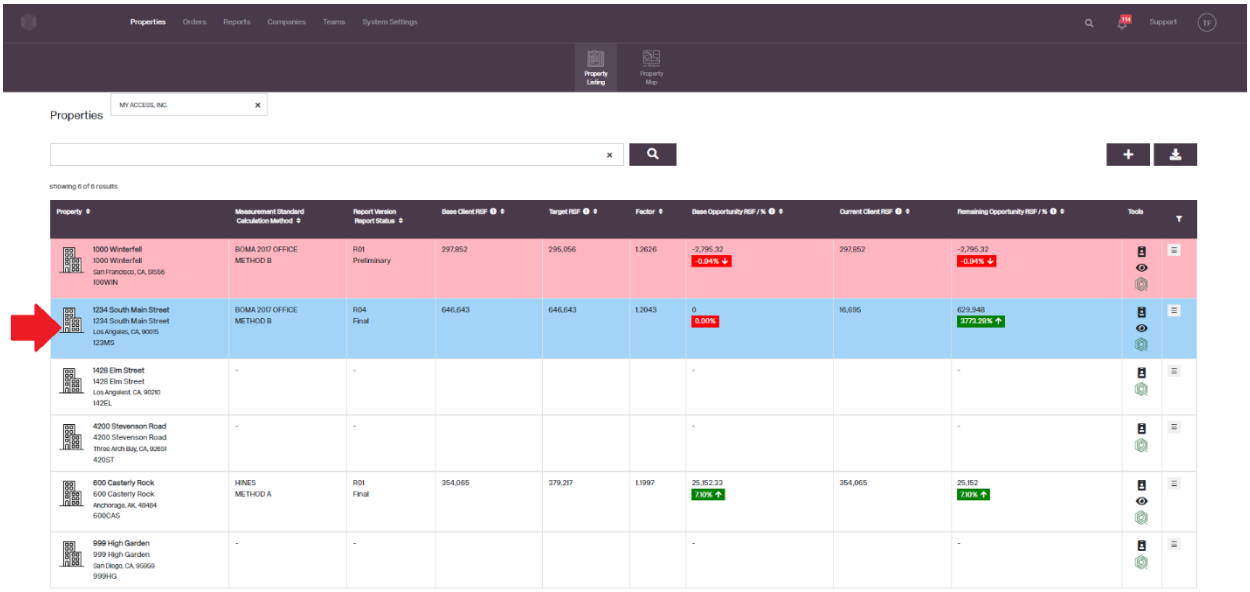
Mat, the Project Manager, and the Sales Representative set in the Property Summary will automatically be CC'd on the email, therefore DO NOT invite an SSI employee to view the building report.

The text field includes a prepopulated template. You can enter or remove any information you see fit. **However, you MUST leave the link.**

4.4.9 Removing Measurement Reports

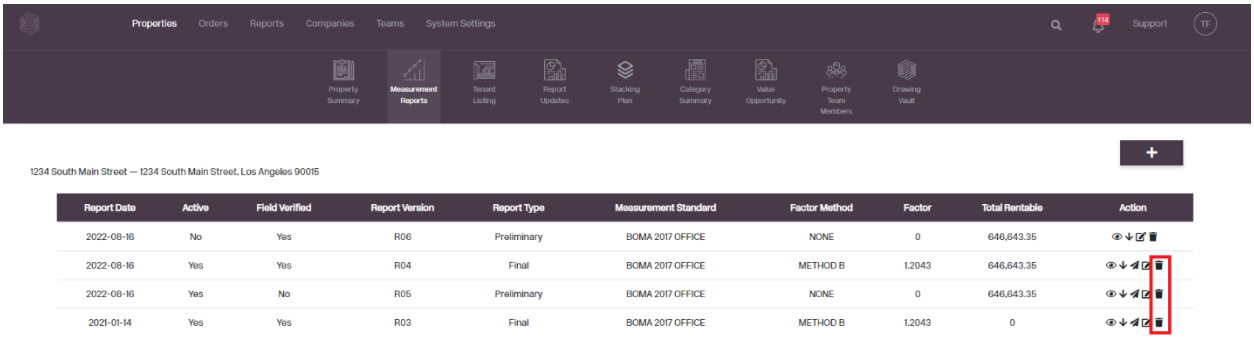
If you need to remove a report for any reason you can do so directly from the Measurement Reports page.

Select the Property from the Property Listing page.

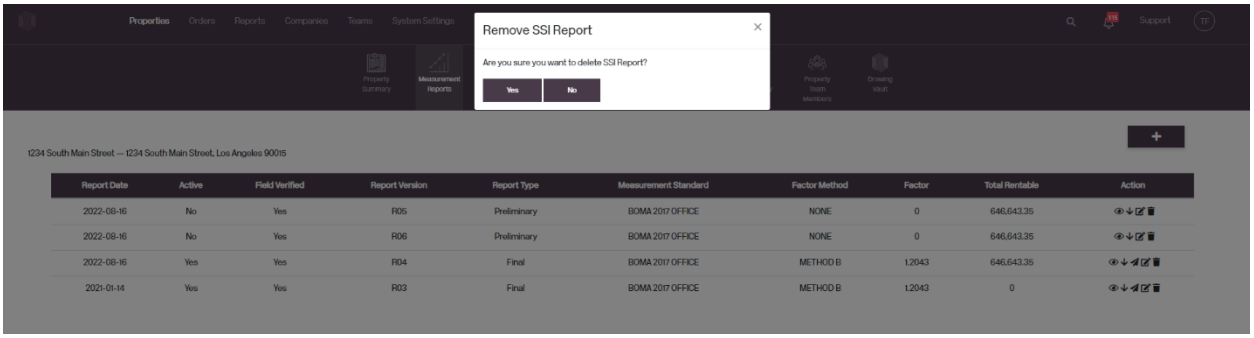


You are redirected to **Measurement Reports**.

Click on the **trashcan icon** for the report you are wanting to remove.



You will be asked to Verify that you are wanting to remove the report.



Click **Yes**.

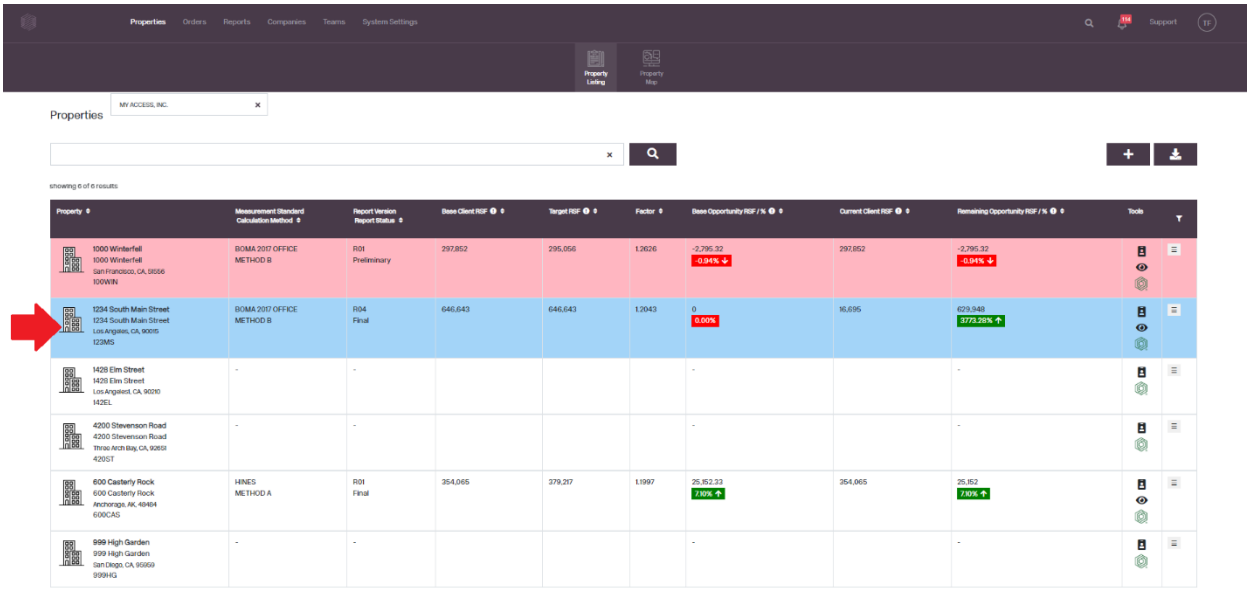
The report is now removed from the listing.

4.5 Tenant Listing

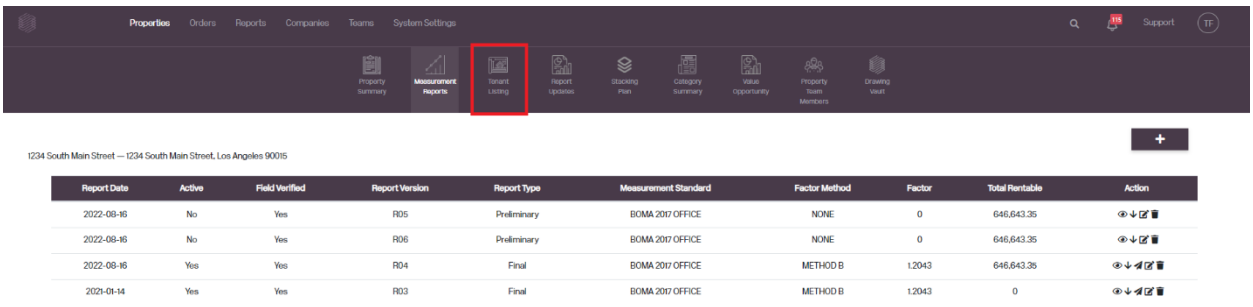
Tenant Listing displays a property's tenants, lease expiration, floor and suite composites, and standard Stevenson System measurements broken down by floor and suite. As an SSI Admin you will be able to view all reports within the report version dropdown. Clients can only view Active reports. The report selected under Client Viewable Report Version is the default view for clients.

There are different views for final reports and preliminary reports, but regardless of the report type, the listing is generated by the PT command in CAD.

From the Property Listing page, select a property.

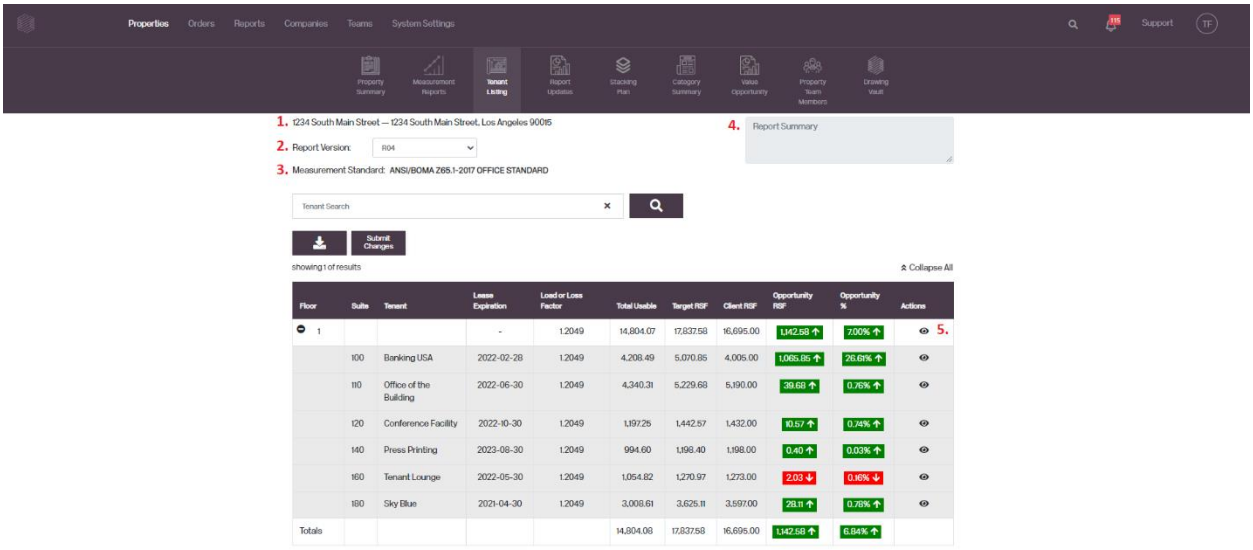


You are redirected to the **Measurement Reports** page. Click **Tenant Listing**.



4.5.1 Final Reports

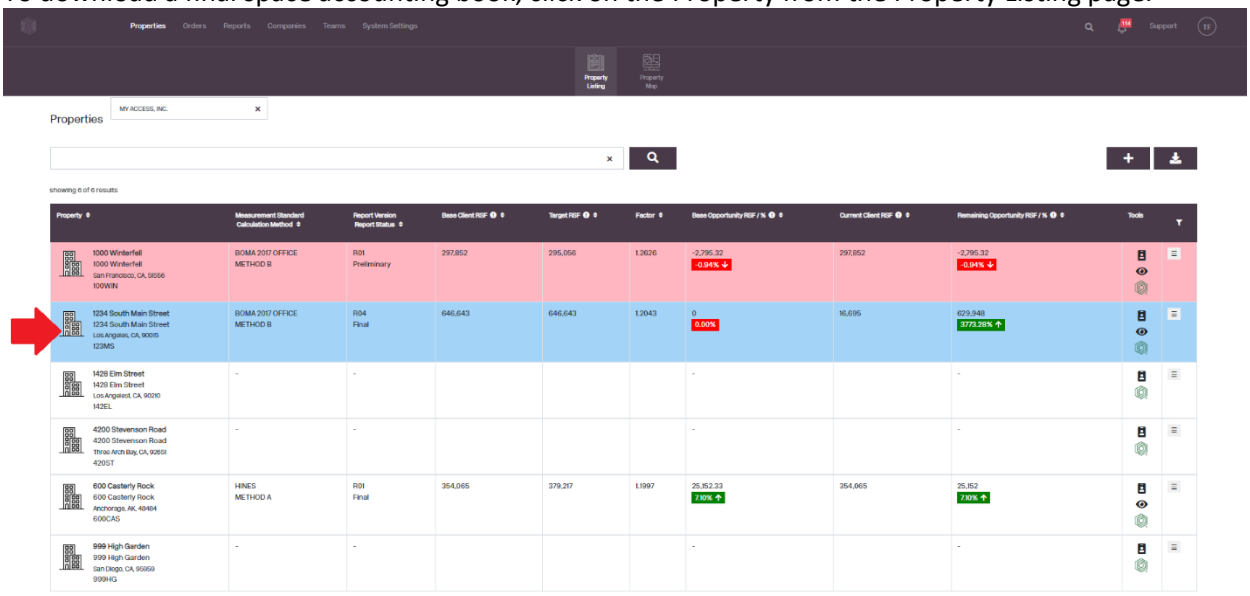
Final Reports will display a single load factor and final composite drawings.



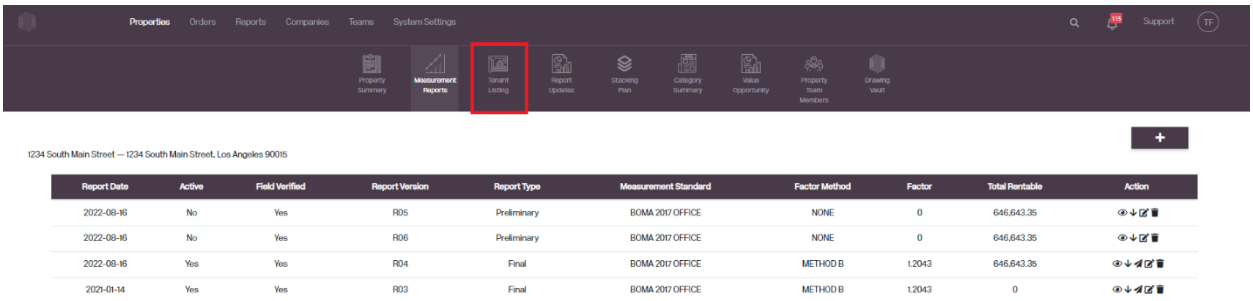
1. Property address
2. Report version – dropdown displays ONLY active report versions and defaults to the Current Report Version selected in the Property Summary page
3. Measurement Standard – the standard used for the report version
4. Report Summary – use this to search for specific tenant(s)
5. View icon – link to the floor or tenant composite drawings

4.5.1.1 Download Final Space Accounting Book

To download a final space accounting book, click on the Property from the Property Listing page.



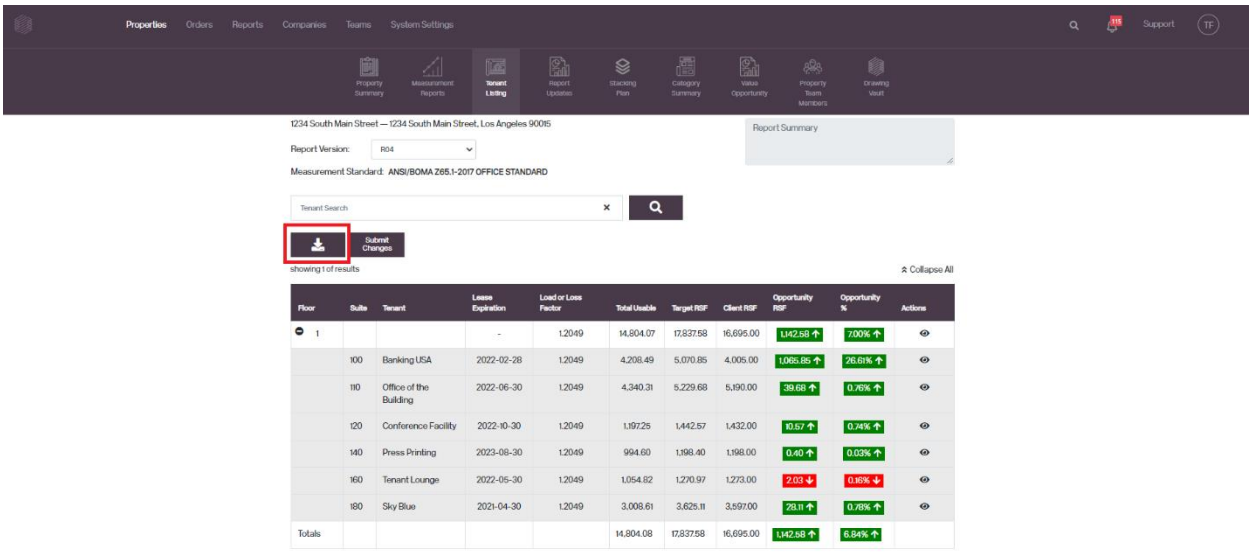
You are redirected to the Measurement Reports page.
Click Tenant Listing.



Report Date	Active	Field Verified	Report Version	Report Type	Measurement Standard	Factor Method	Factor	Total Rentable	Action
2022-08-16	No	Yes	R05	Preliminary	BOMA 2017 OFFICE	NONE	0	646,643.35	
2022-08-16	No	Yes	R06	Preliminary	BOMA 2017 OFFICE	NONE	0	646,643.35	
2022-08-16	Yes	Yes	R04	Final	BOMA 2017 OFFICE	METHOD B	1.2043	646,643.35	
2021-01-14	Yes	Yes	R03	Final	BOMA 2017 OFFICE	METHOD B	1.2043	0	

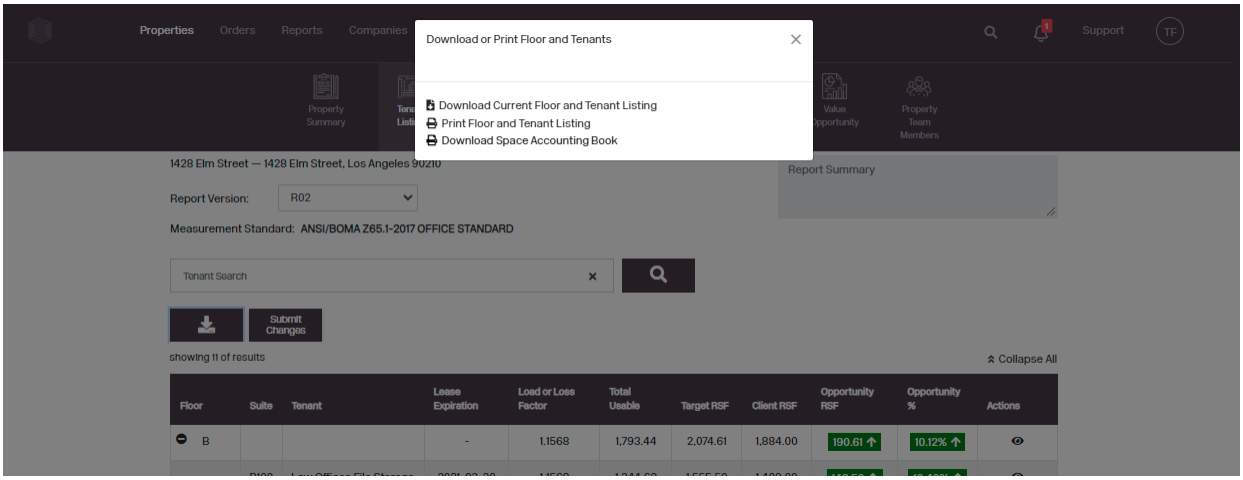
Select the desire report version from the dropdown.

Click on the **Download icon**.



Floor	Suite	Tenant	Lease Expiration	Load or Loss Factor	Total Usable	Target RSF	Client RSF	Opportunity RSF	Opportunity %	Actions
1			-	1.2049	14,804.07	17,837.58	16,695.00	1,142.58 ↑	7.00% ↑	
	100	Banking USA	2022-02-28	1.2049	4,208.49	5,070.85	4,005.00	1,065.85 ↑	26.61% ↑	
	110	Office of the Building	2022-06-30	1.2049	4,340.31	5,229.68	5,190.00	39.68 ↑	0.76% ↑	
	120	Conference Facility	2022-10-30	1.2049	1,197.25	1,442.57	1,432.00	10.57 ↑	0.74% ↑	
	140	Press Printing	2023-08-30	1.2049	994.60	1,198.40	1,198.00	0.40 ↑	0.03% ↑	
	160	Tenant Lounge	2022-05-30	1.2049	1,054.82	1,270.97	1,273.00	2.03 ↓	0.16% ↓	
	180	Sky Blue	2021-04-30	1.2049	3,008.61	3,625.11	3,597.00	28.11 ↑	0.78% ↑	
Totals					14,804.08	17,837.58	16,695.00	1,142.58 ↑	6.84% ↑	

You will have the option to download either the Current Floor and Tenant Listing, Print Floor and Tenant Listing, or Download Space Accounting Book.



Floor	Suite	Tenant	Lease Expiration	Load or Loss Factor	Total Usable	Target RSF	Client RSF	Opportunity RSF	Opportunity %	Actions
B			-	1.1568	1,793.44	2,074.61	1,884.00	190.61 ↑	10.12% ↑	

Download Current Floor and Tenant Listing downloads a CSV spreadsheet of the table data.
Print Floor and Tenant Listing allows you to directly print the page.

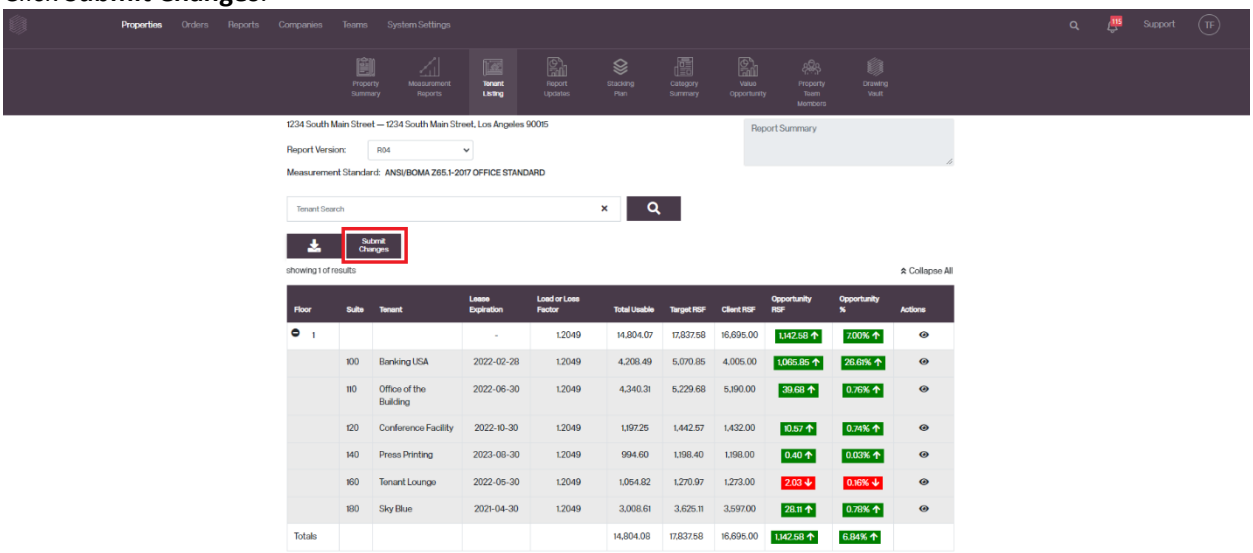
Download Space Accounting Book compiles and downloads a space accounting book. If the Space Accounting Book has not been previously compiled, TruSpace will compile it for you and then email it as a PDF when it is completed. If it has been previously compiled, it will download immediately.

4.5.1.2 Submit Changes to Final Space Accounting Book

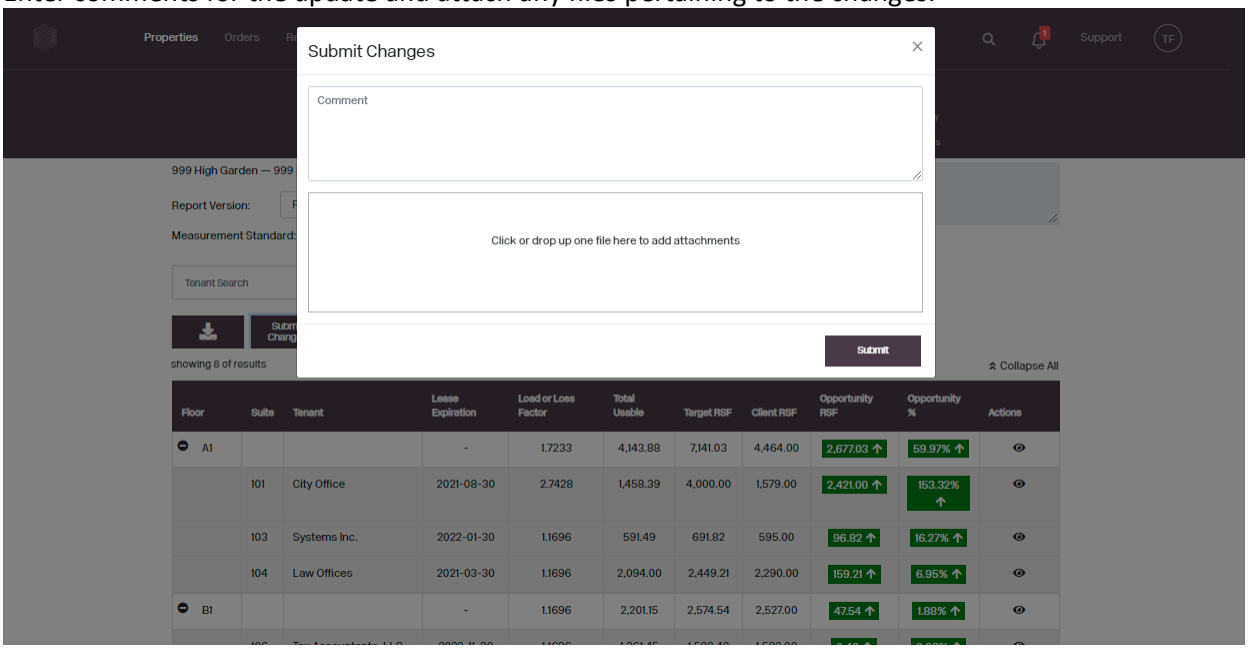
To submit changes to a Space Accounting Book, click on the Property from the Property Listing page. You are redirected to the Tenant Listing page.

First click **Download**. Select **Download Current Floor and Tenant Listing** to receive the Tenant Listing as an excel sheet. You can then make changes to the excel sheet.

Click **Submit Changes**.



Enter comments for the update and attach any files pertaining to the changes.

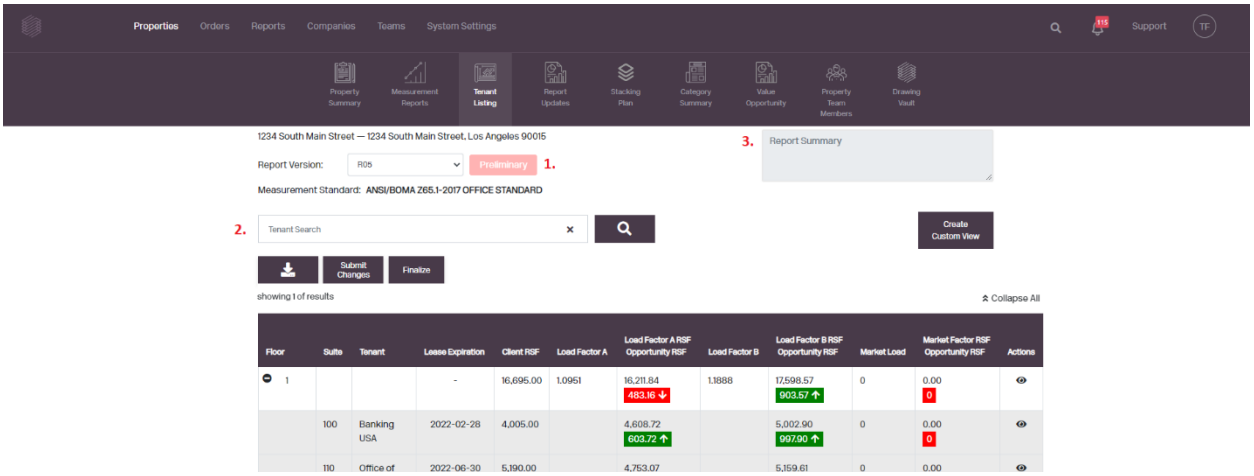


When completed, click **Submit**.

You are redirected to the **Report Updates** page. By clicking on the corresponding item in the list you will see the order details for the changes submitted.

4.5.2 Preliminary Reports

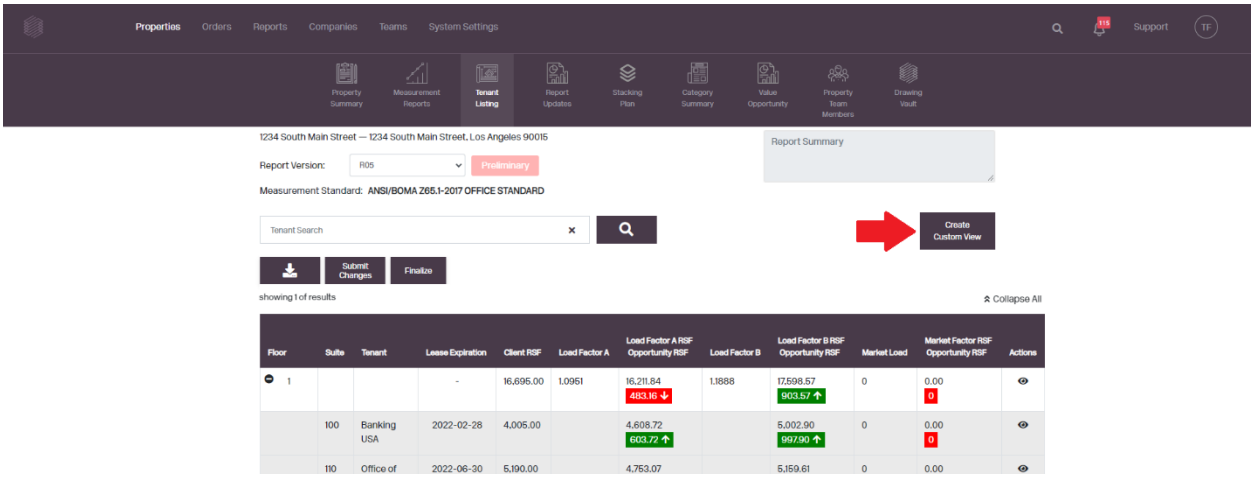
Preliminary Reports are displayed separately from final reports with the intent to allow for comparing data from different report versions.



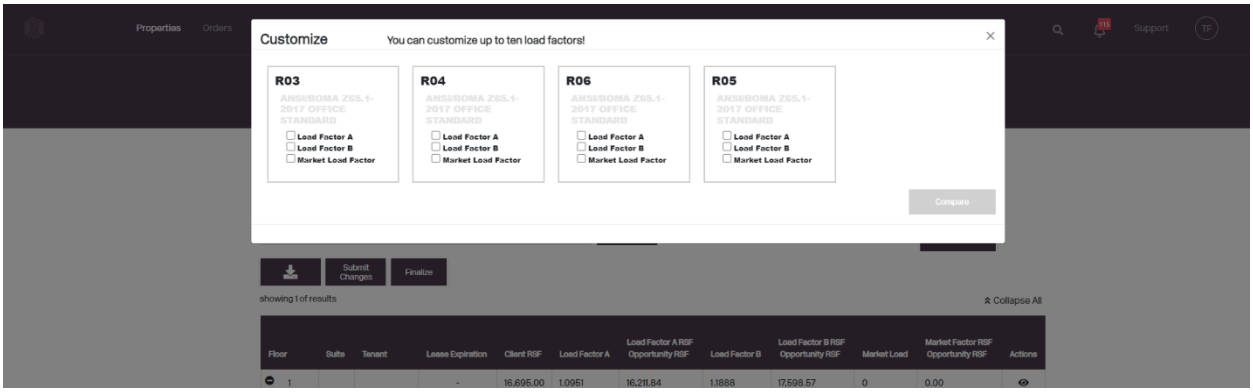
The report version displayed will have a preliminary report indication (1), you can search for tenants using the search box (2), and a report summary imported from CAD to distinguish differences in report versions is displayed (3).

4.5.2.1 Creating Custom View to Compare Load Factors

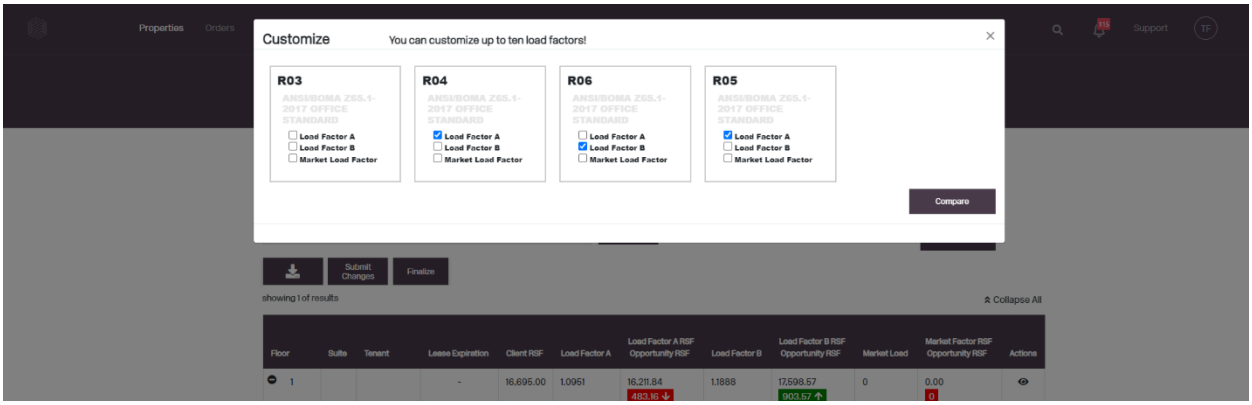
For Preliminary reports, you can compare up to 10 load factors between different report versions. To do so, click **Create Custom View**.



You can select up to 10 load factors from the active reports displayed.



Select the checkboxes of the load factors you'd like to compare. If you choose Market Load Factor, a box will be displayed to enter Market factor for the building.

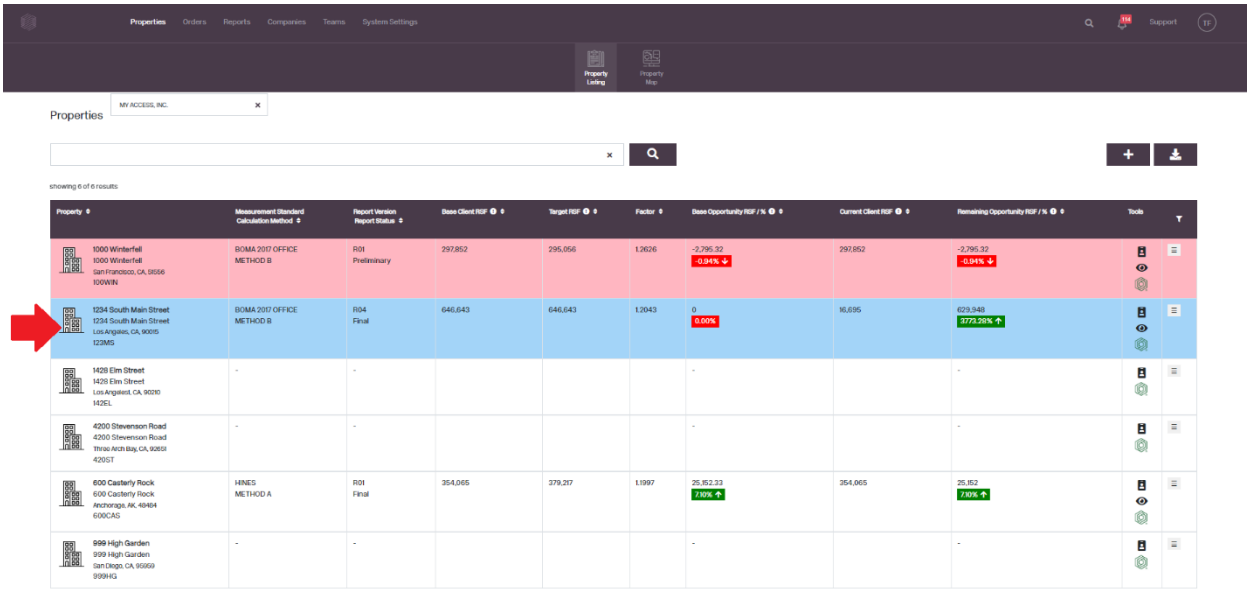


Once selected, click **Compare**.

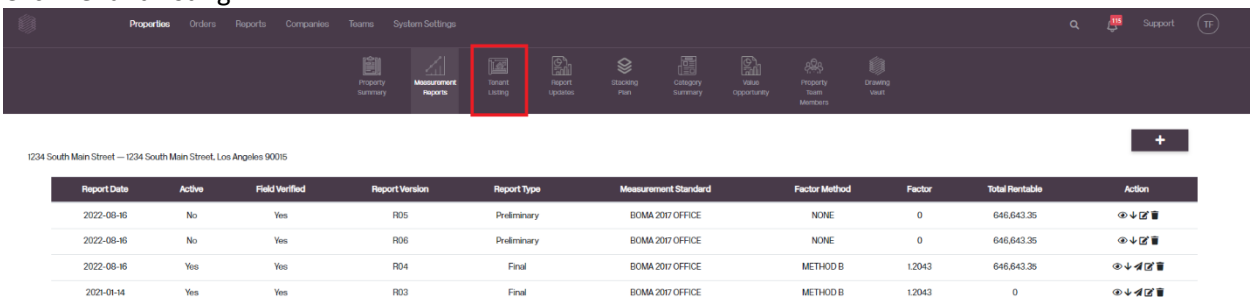
The load factors you selected are displayed in the table.

4.5.2.2 Download Preliminary Tenant Listing

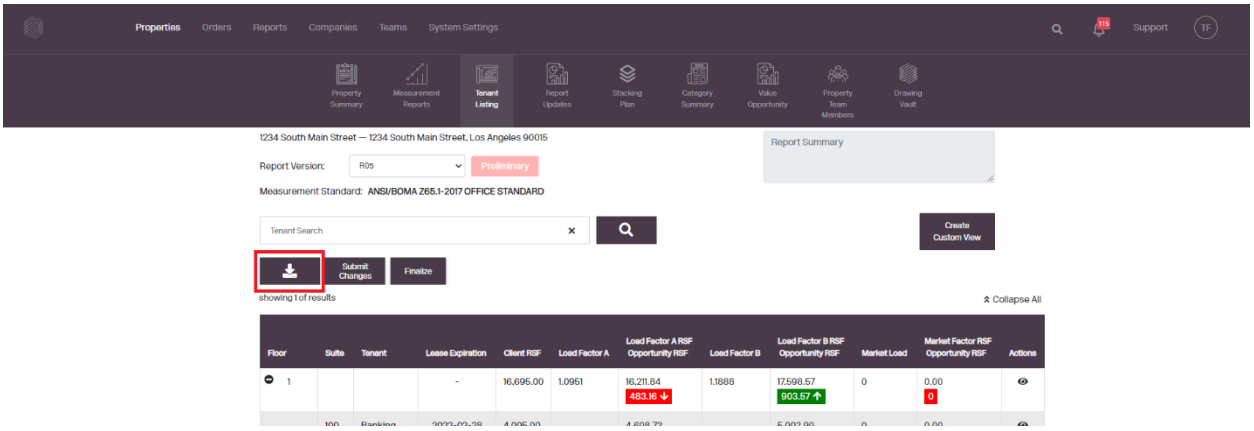
To download a preliminary space accounting book, click on the Property from the Property Listing page.



You are redirected to the Measurement Reports page.
Click Tenant Listing.



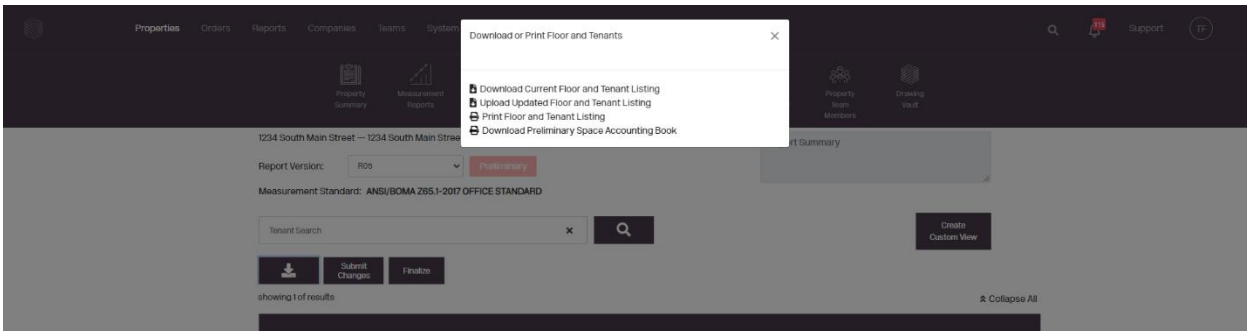
Select the desire report version from the dropdown.
Click on the Download icon.



You have one of 4 options:

Download Current Floor and Tenant Listing downloads a CSV spreadsheet of the table data.
Upload Updated Floor and Tenant Listing overrides the market factor by floor.
Print Floor and Tenant Listing allows you to directly print the page.

Download Space Accounting Book compiles and downloads a space accounting book. If the Space Accounting Book has not been previously compiled, TruSpace will compile it for you and then email it as a PDF when it is completed. If it has been previously compiled, it will download immediately.

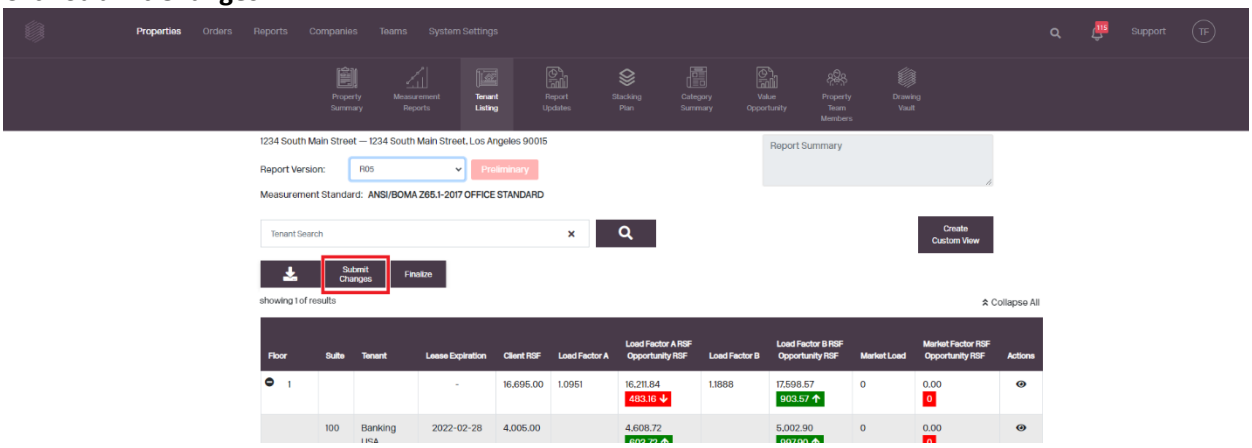


4.5.2.3 Submit Changes for Tenant Listing

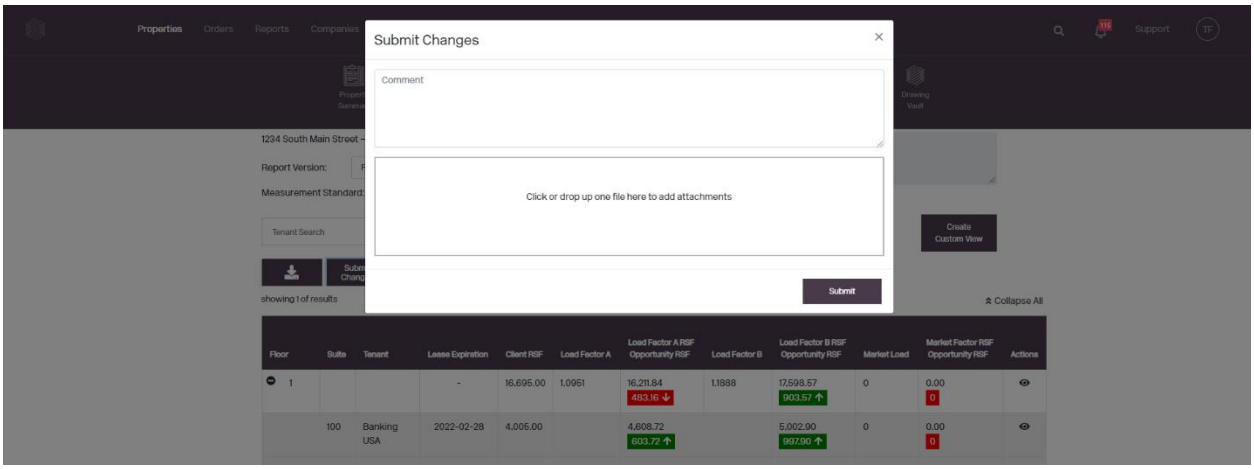
To submit changes to a Space Accounting Book, click on the Property from the Property Listing page. You are redirected to the Tenant Listing page.

First click **Download**. Select **Download Current Floor and Tenant Listing** to receive the Tenant Listing as an excel sheet. You can then make changes to the excel sheet.

Click **Submit Changes**.



Enter comments for the update and attach any files pertaining to the changes.



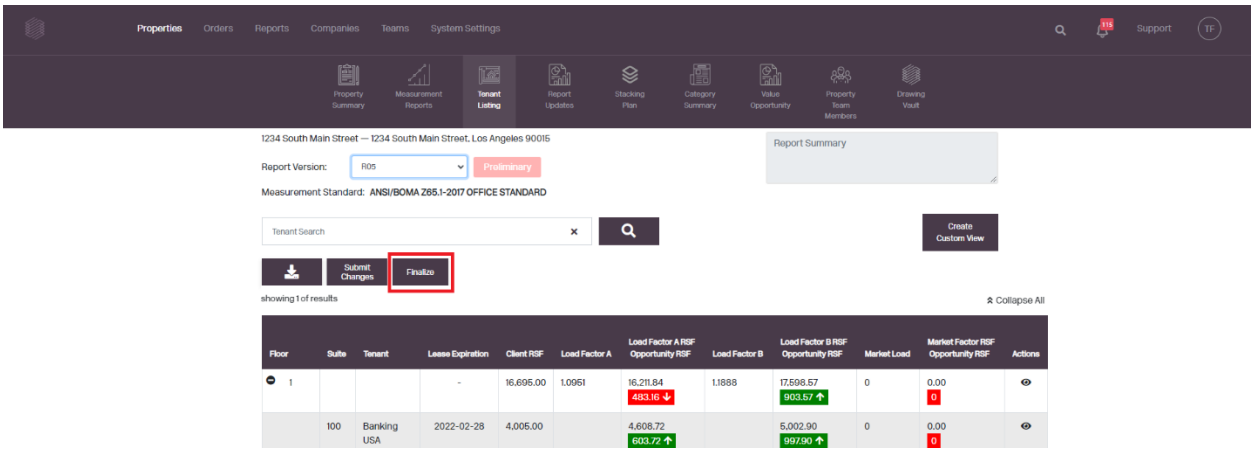
When completed, click **Submit**.

You are redirected to the **Report Updates** page. By clicking on the corresponding item in the list you will see the order details for the changes submitted.

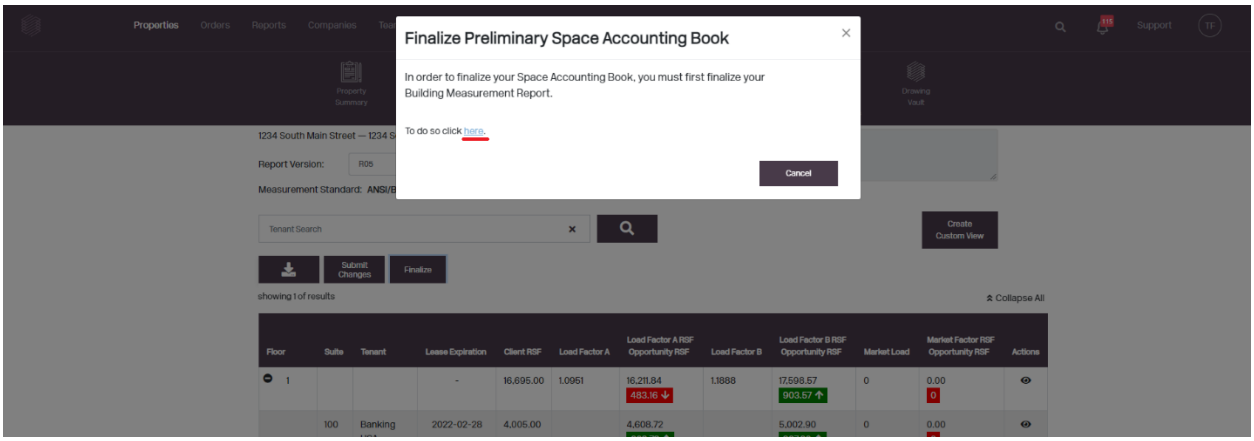
4.5.2.4 FINALIZE TENANT LISTING

Space Accounting Books will be finalized at the time of Measurement Reports finalization. Therefore, the finalize button on the tenant listing will provide a link to finalize the measurement report.

Click **Finalize**.



A message to finalize the measurement report is displayed.



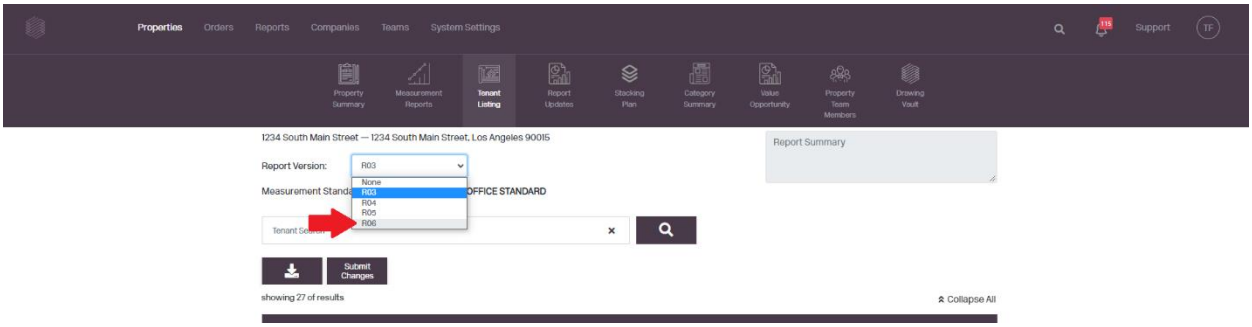
A link is provided to finalize the measurement report.

Click **Cancel** to return.

4.5.3 Inactive Reports

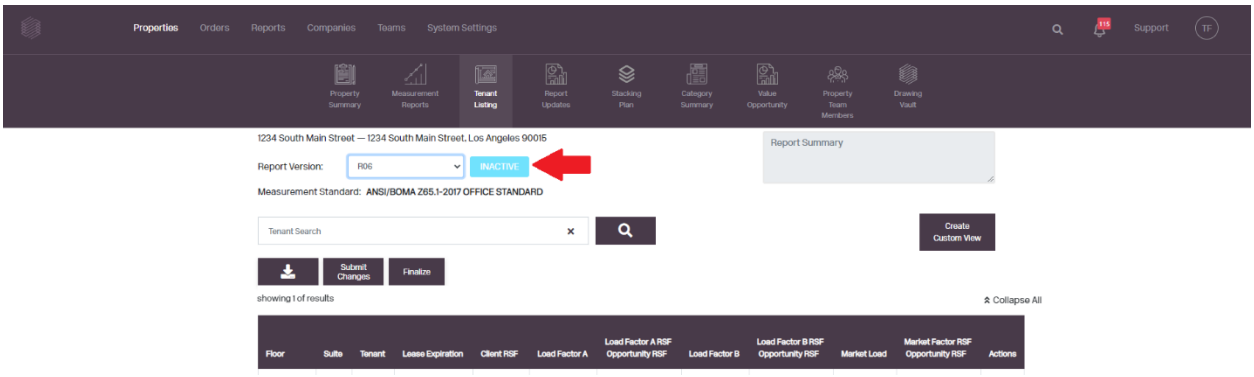
Inactive reports are displayed in the report version dropdown for SSI Admin ONLY.

Click on the dropdown.



The inactive report is displayed with a gray background.

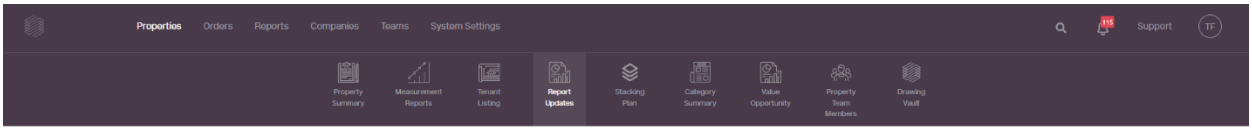
Select the report.



The report displays an inactive label.

4.6 Report Updates

Report Updates is a log of the changes and finalizations made to Building Measurement Reports and the Space Accounting Book.



1234 South Main Street — 1234 South Main Street, Los Angeles 90015

1. 2. 3. 4.

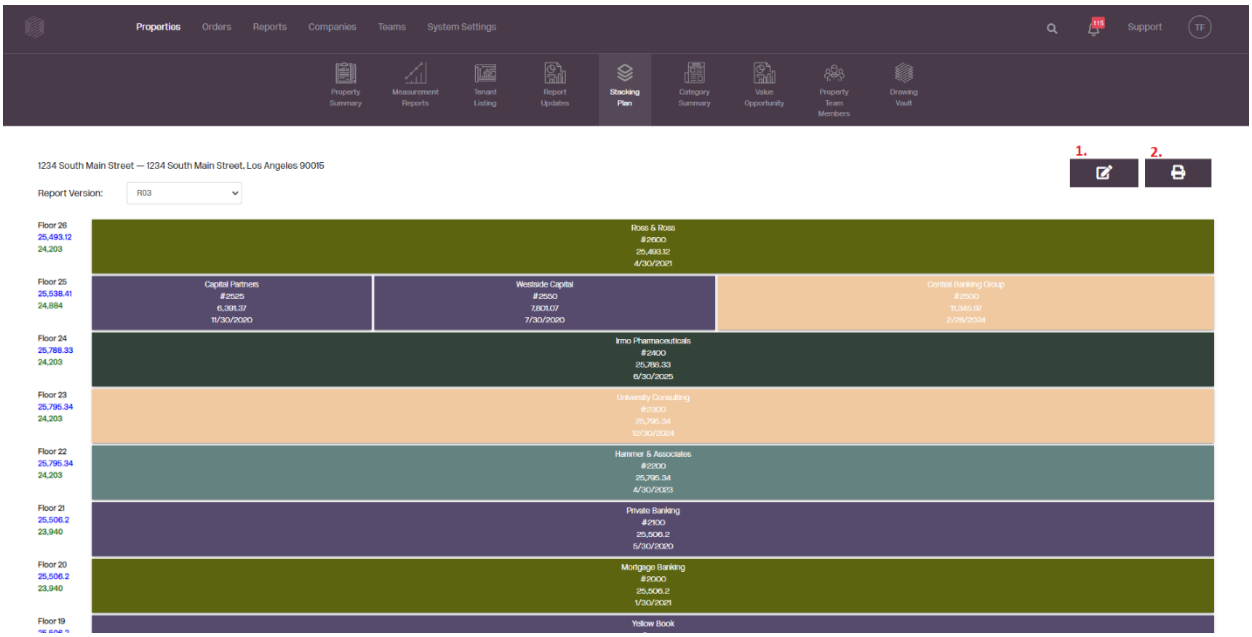
Requested By	Date Requested	Report Status	Report Version	Measurement Standard	Factor Method	Changes Requested	Related Order
Pat Test	2022-08-16	Preliminary	R06	BOMA 2017 OFFICE	Load Factor A	Report Finalization	Order #14975
Tara Finigan	2022-08-16	Final	R03	BOMA 2017 OFFICE	-	Report Modifications	Order #14973
Pat Test	2022-07-07	Final	R05	BOMA 2017 OFFICE	METHOD B	SAB Modifications	Order #14528
test Test	2022-07-07	Final	R06	BOMA 2017 OFFICE	METHOD B	SAB Modifications	Order #14528
test Test	2022-07-07	Final	R06	BOMA 2017 OFFICE	METHOD B	SAB Modifications	Order #14528
test Test	2022-07-07	Final	R06	BOMA 2017 OFFICE	METHOD B	SAB Modifications	Order #14528
test Test	2022-07-07	Final	R06	BOMA 2017 OFFICE	METHOD B	SAB Modifications	Order #14528
test Test	2022-07-07	Final	R06	BOMA 2017 OFFICE	METHOD B	SAB Modifications	Order #14528
test Test	2022-07-07	Final	R06	BOMA 2017 OFFICE	METHOD B	SAB Modifications	Order #14528

Requested By (1) allows you to see what user created the request. Starting with Report Status (2) and going across the table to Factor Method, the information displayed here is related to the report version that is either being updated or finalized. Change requested (3) will display: report finalization, report modification, or SAB modifications. This field is directly related to the service type in order details. Related order (4) displays the order ID of the corresponding order.

Click on the request in the listing to be redirected to the order details.

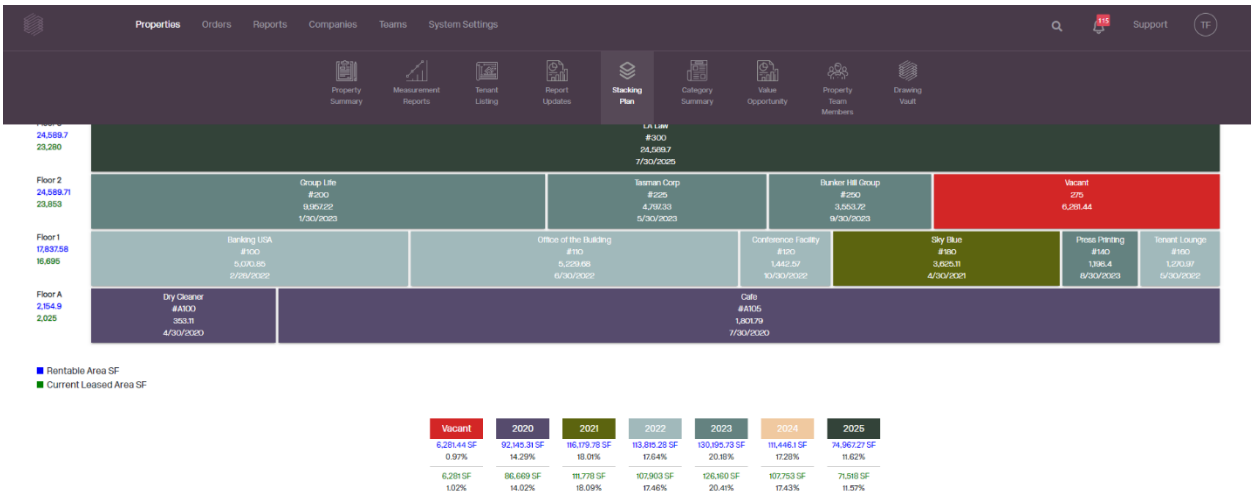
4.7 Stacking Plan

The Stacking Plan displays tenants by floor, highlighting rentable and current leased square footage. Each tenant is broken down by tenant name, suite number, rentable square footage, and lease expiration date.

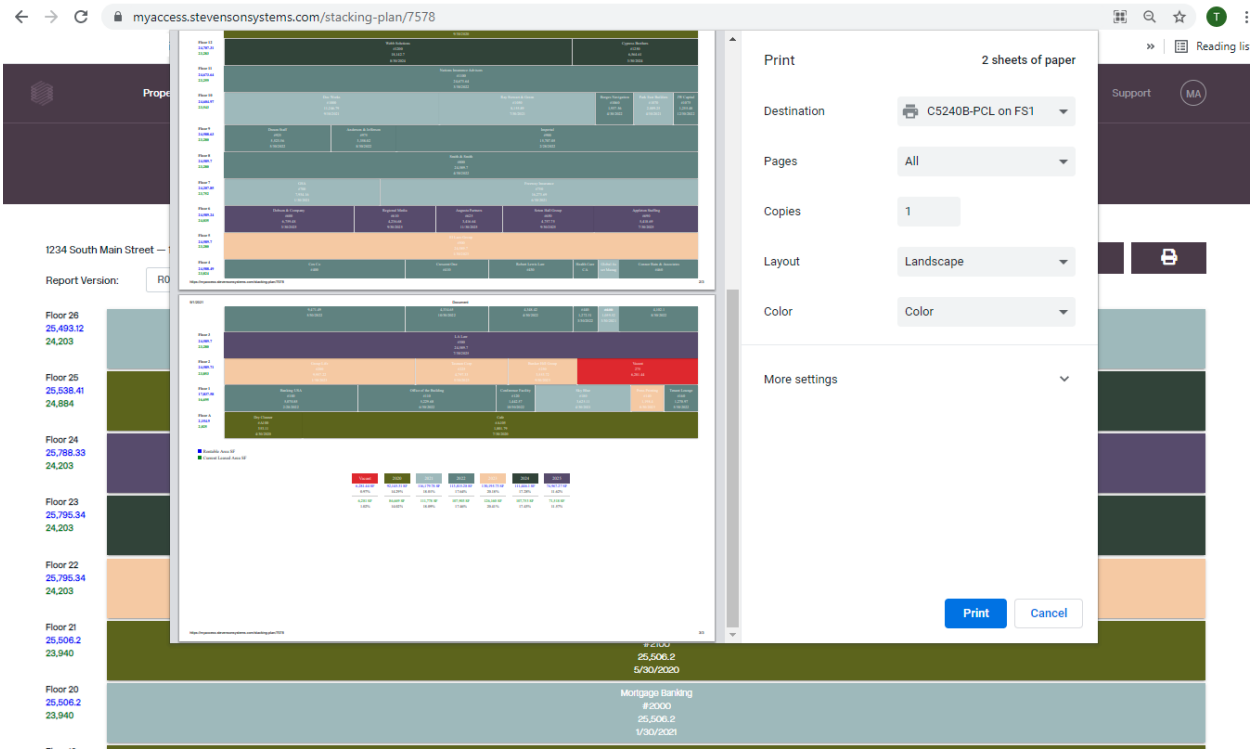


On the left-hand side, rentable square footage and current leased square footage totals are specified by floor.

At the bottom of the page, rentable square footage for the entire building is broken down by lease expiration year.



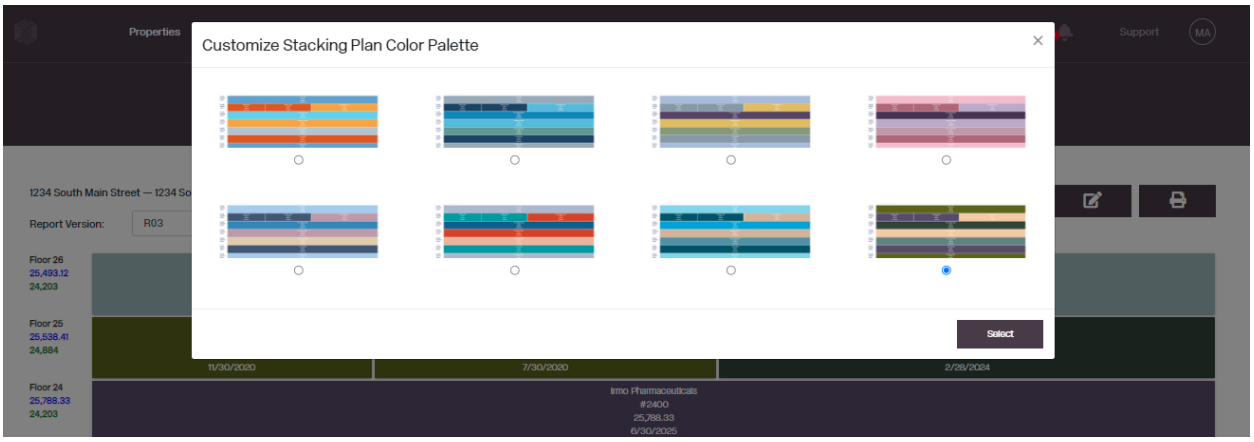
Click the **Print icon (2)** to print the entire Stacking Plan.



4.7.1 Customizing Your Stacking Plan

Click the **Edit icon (1)** to customize the color palette used for your stacking plan.

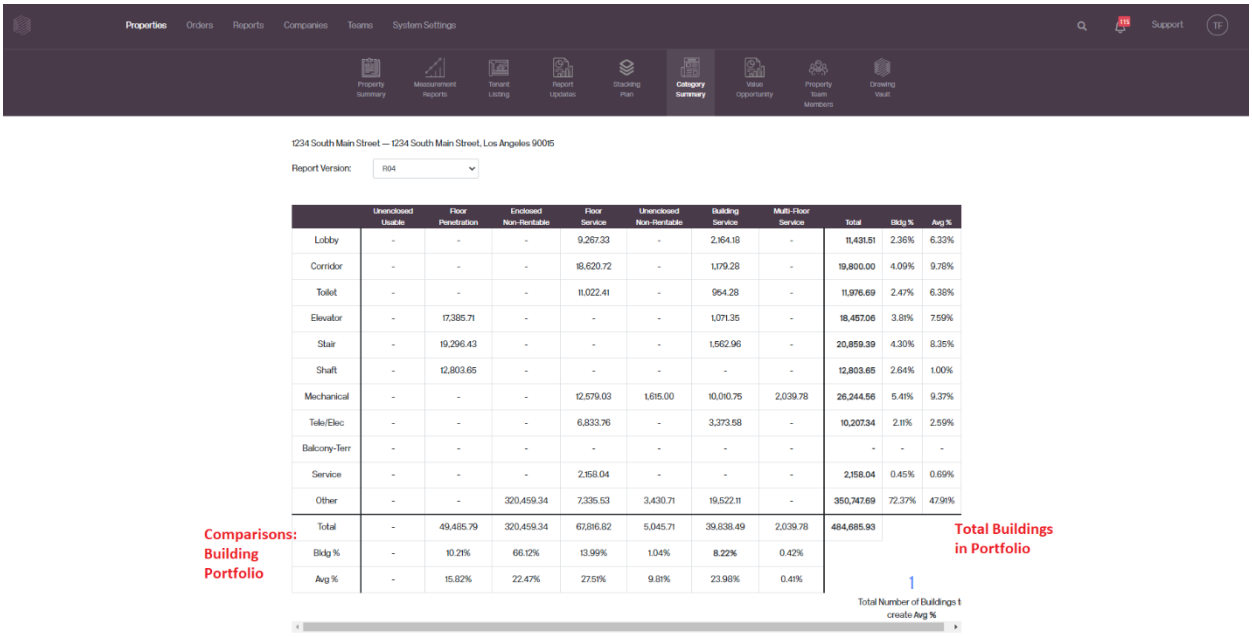
You can pick one color palette from the eight to choose from to view all properties in.



Once you have selected your color palette, click **Submit**.

4.8 Category Summary

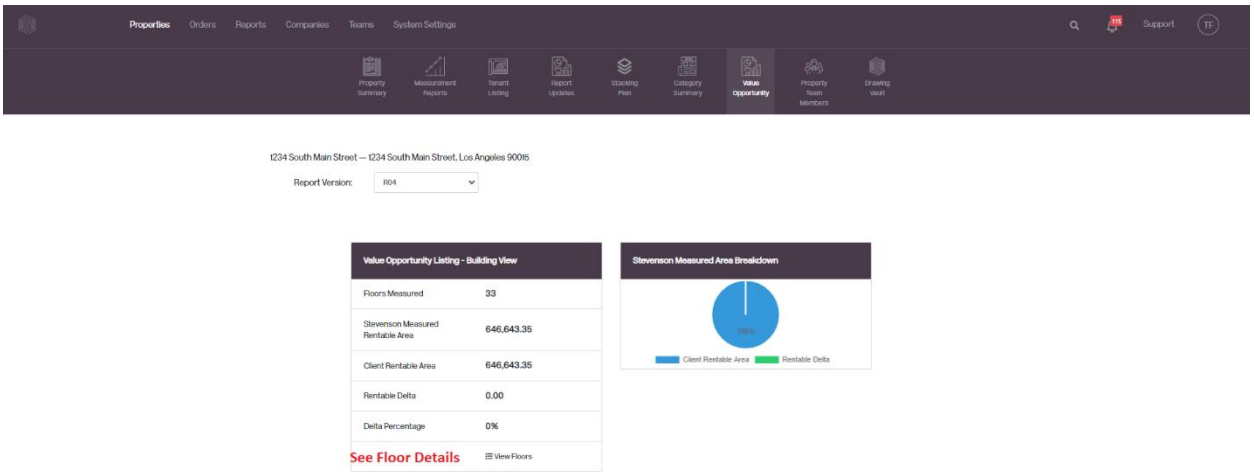
Category Summary allows for a user to see a breakdown of area by specified space of an individual building for final reports.



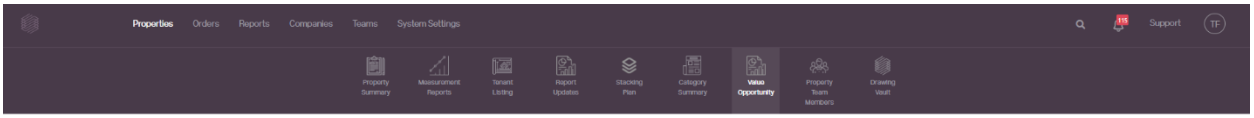
	Unenclosed Usable	Floor Penetration	Enclosed Non-Rentable	Floor Service	Unenclosed Non-Rentable	Building Service	Multi-Floor Service	Total	Bldg %	Avg %
Lobby	-	-	-	9,267.33	-	2,164.18	-	11,431.51	2.36%	6.33%
Corridor	-	-	-	18,620.72	-	1,179.28	-	19,800.00	4.09%	9.78%
Toilet	-	-	-	11,022.41	-	954.28	-	11,976.69	2.47%	6.38%
Elevator	-	17,385.71	-	-	-	1,071.35	-	18,457.06	3.81%	7.59%
Stair	-	19,296.43	-	-	-	1,562.96	-	20,859.39	4.30%	8.35%
Shaft	-	12,803.65	-	-	-	-	-	12,803.65	2.64%	1.00%
Mechanical	-	-	-	12,579.03	1,615.00	10,010.75	2,039.78	26,244.56	5.41%	9.37%
Tele/Elec	-	-	-	6,833.76	-	3,373.58	-	10,207.34	2.11%	2.59%
Balcony-Terr	-	-	-	-	-	-	-	-	-	-
Service	-	-	-	2,158.04	-	-	-	2,158.04	0.45%	0.69%
Other	-	-	320,459.34	7,335.53	3,430.71	19,522.11	-	350,747.69	72.37%	47.91%
Total	-	49,485.79	320,459.34	67,816.82	5,045.71	39,838.49	2,039.78	484,685.93		
Bldg %	-	10.21%	66.12%	13.99%	1.04%	8.22%	0.42%			
Avg %	-	15.82%	22.47%	27.51%	9.81%	23.98%	0.41%			

4.9 VALUE OPPORTUNITY

Value Opportunity is a graphical representation of the difference between rentable square footage provided by the client and the rentable square footage gained by Stevenson Systems during the measurement process for an individual building.



Click **View Floors** to view Value Opportunity by floor of the selected building.



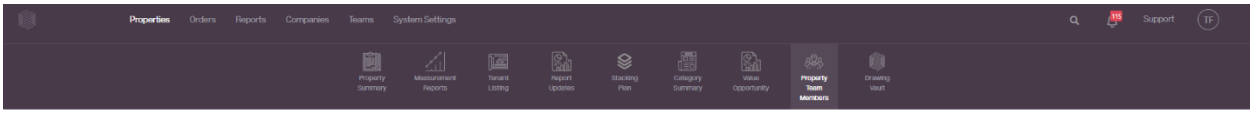
MY ACCESS, INC.
1234 South Main Street — 1234 South Main Street, Los Angeles 90015

Opportunity Trend - Floor Listing

Floor	Current Lease	Measured Area	Rentable Increase	Increase Percent
CP	0.00	0.00	0.00	0.00%
D	0.00	0.00	0.00	0.00%
C	0.00	0.00	0.00	0.00%
B	0.00	0.00	0.00	0.00%
A	0.00	0.00	0.00	0.00%
1	16695.00	17837.58	1142.58	6.41%
2	0.00	0.00	0.00	0.00%
3	0.00	0.00	0.00	0.00%
4	0.00	0.00	0.00	0.00%
5	0.00	0.00	0.00	0.00%
6	0.00	0.00	0.00	0.00%
7	0.00	0.00	0.00	0.00%
8	0.00	0.00	0.00	0.00%
9	0.00	0.00	0.00	0.00%
10	0.00	0.00	0.00	0.00%
11	0.00	0.00	0.00	0.00%

4.10 Property Team Members

Property Team Members displays all users who have access to the property.



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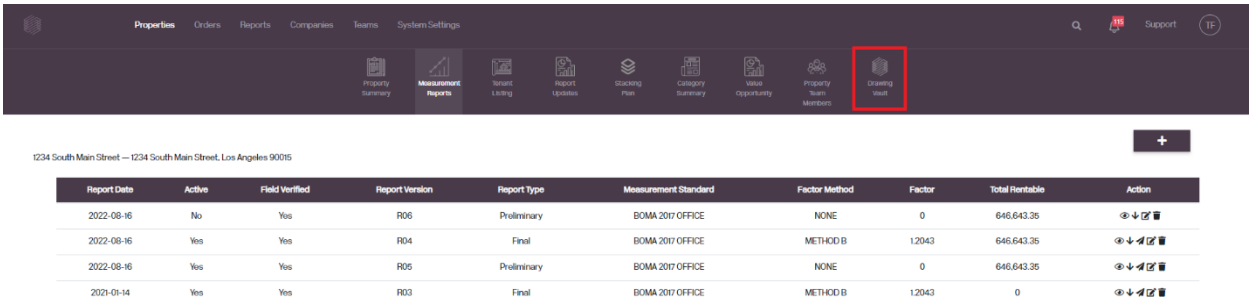
showing 11 of 11 results

Name	Email	Access Level	Building	Status	Active
Test Testerson	cccd6f65.bulletproof.co.uk@uk.teams.ms	Limited User	1234 South Main Street	PENDING	Yes
Tara Finigan	tarafinigan@ssicorporate.com	Company Manager	1234 South Main Street	ACTIVE	Yes
Tara Finigan	finigantara@gmail.com	Company Administrator	1234 South Main Street	PENDING	Yes
Steve Aldapa	saldapa@irvinecompany.com	Limited User	1234 South Main Street	PENDING	Yes
Rick Wandrocke	rwandrocke@irvinecompany.com	Limited User	1234 South Main Street	PENDING	Yes
MyAccess Admin	bob@ssicorporate.com	Company Manager	1234 South Main Street	ACTIVE	Yes
Laura Phillips	lphillips@irvinecompany.com	Limited User	1234 South Main Street	PENDING	No
Jeffrey DuChateau	JDuChateau@LPC.com	Company Administrator	1234 South Main Street	ACTIVE	Yes
Jason Charalambous	projects@bulletproof.co.uk	Limited User	1234 South Main Street	PENDING	No
Gregory Anderson	gregory@tonwestcreative.com	User	1234 South Main Street	ACTIVE	Yes
Alisan Spackman	aspackman@irvinecompany.com	Limited User	1234 South Main Street	PENDING	No

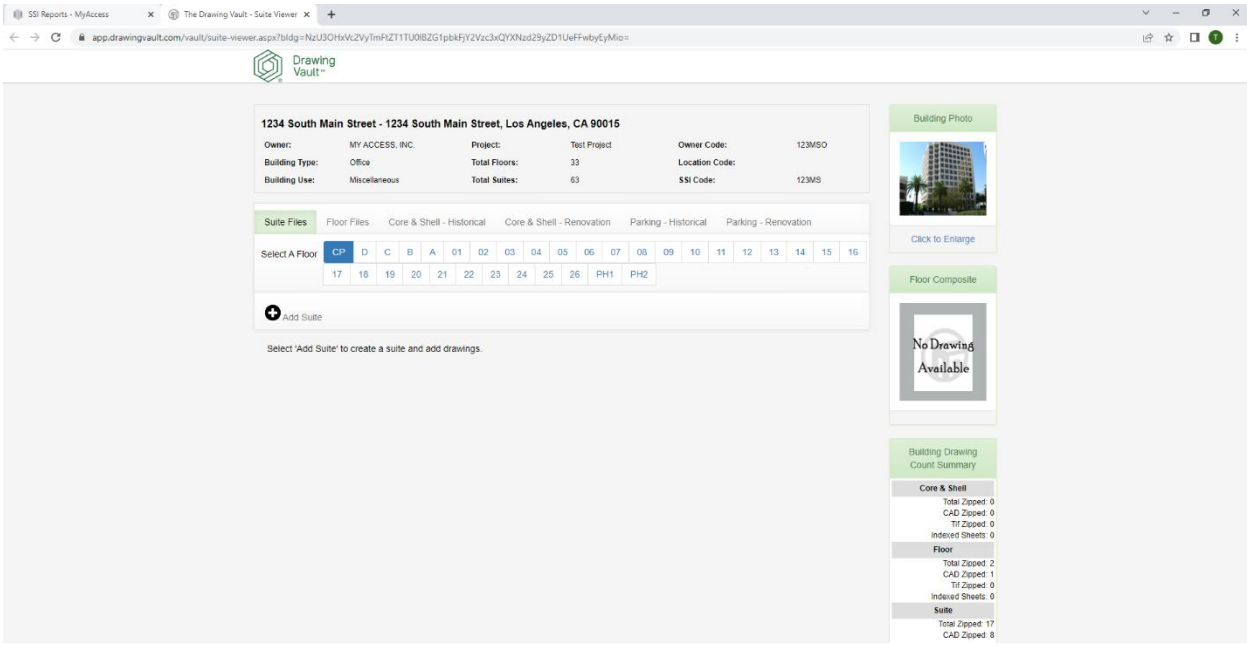
The table displays the name of the user, their email, their access level, and the status of building (whether they have accepted the building during logging in or not).

4.11 Drawing Vault

Drawing Vault allows for access to the Drawing Vault.



By clicking on the navigation, the Drawing Vault for the selected property will open in a new tab.



5.0 ORDERS

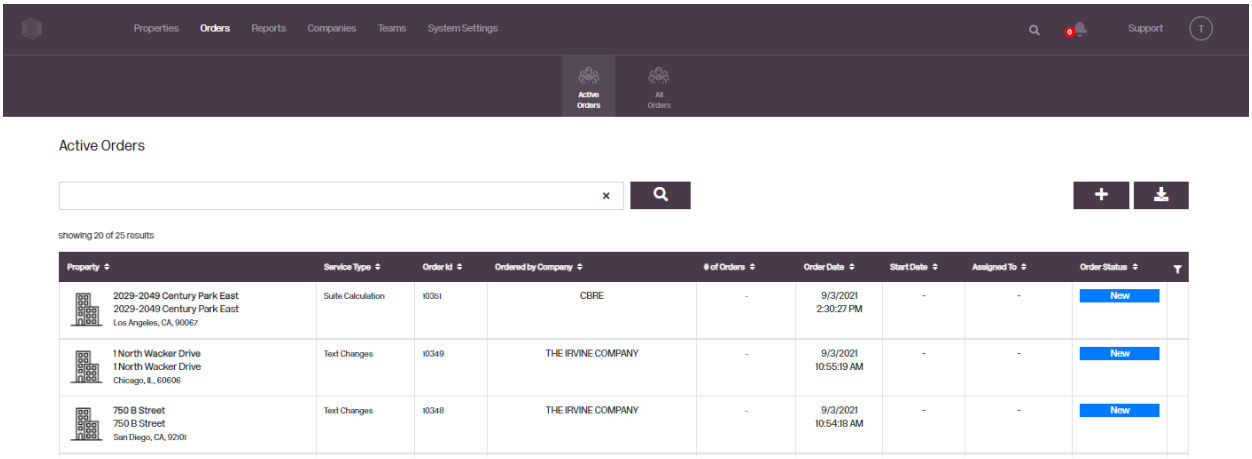
Once logged in, select the **Orders** tab from the navigation at the top of the page.

Important to Note:

SSI Admins and Employees can see **all** orders placed for any building and by any user.
Limited Users and Users can **only** see the orders that they have placed or that an SSI Admin has placed on their behalf, regardless of the state of the order.
Company Admins and Company Managers can see **all** orders that are placed for **their properties,** regardless of the state of the order.

5.1 ACTIVE ORDERS

Active Orders contains all orders that are in the “New”, “Pending”, or “Paused” states that have been placed by an SSI Admin or a client. Order viewability is dependent on what access level each user has.



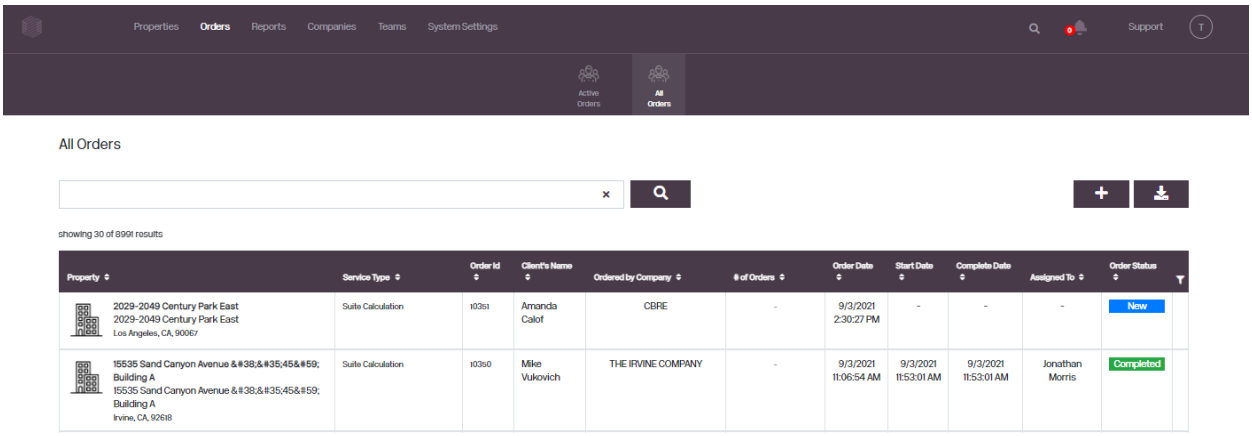
Click the **+ icon,** to create a new order.

Click the **icon,** to download an excel file of all active orders.

Clicking on an order will redirect you to Order Details.

5.2 All Orders

All Orders contains all orders (New, Pending, Paused, Completed, and Cancelled) that have been placed by an SSI Admin or a client.



Click the **+ icon,** to create a new order.

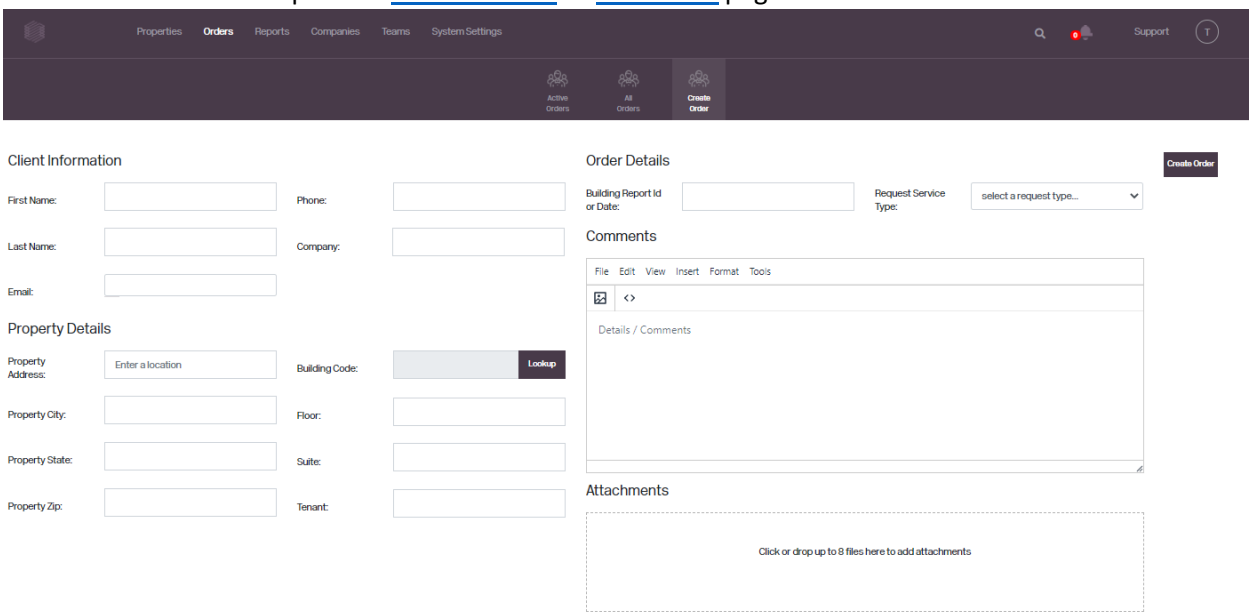
Click the **icon,** to download an excel file of all orders.

Clicking on an order will redirect to that order's Order Details.

5.3 Create Order

SSI Admins can create orders on behalf of a client. An order is created for one building and/or request at a time.

Click the **+ icon** at the top of the **Active Orders** or **All Orders** pages to create an order.



5.3.1 Client Information

Client information details the client that has requested the order. The email address included in the client information will be used to accurately display the order to the correct client and for any correspondence needed pertaining to the order. The email address provided will also be notified when the order has been created and completed.

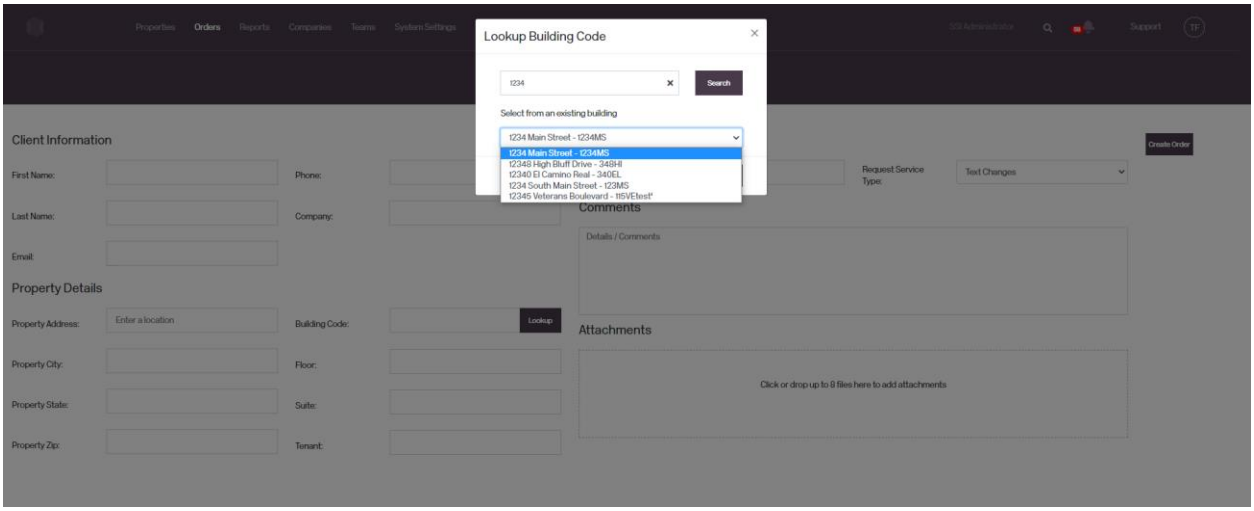
5.3.2 Property Details

Property Details includes the specific building that the order is associated with. As an SSI Admin, the easiest way to search for an order once it has been created, is through the property address, therefore it is essential that the property address is accurate.

Building Code is a required field. To look up the **Building Code**, click **Lookup**.

Type in the numbers of the street address into the search bar and click **Search**.

If the first building address displayed is not correct, you can click on the address dropdown to display all properties that were found from the entered search criteria.



Select the correct address.

Click **Update**.

5.3.3 Order Details

Building Report ID or Date allows for a quick reference to the Report Version the order is regarding. Click into the text box to input the correct Building Report ID or date related to the order.

Requested Service Type is selected based on the work that is going to be performed. It is a required field as it is reflected on the Client's view of Order Details, however you may edit this in Order Details if necessary. This dropdown list corresponds with the Order types in CAD.

Click on the service type dropdown to view all service type options.

Select the one that is applicable.

5.3.4 Notes

Notes allows you to add any details regarding the order that may be needed for the order to be completed.

Note: The client will be able to view any details created here. See Communicate with the Client on how to leave a comment viewable by ONLY an SSI Admin

5.3.5 Attachments

You can attach up to 8 files when creating an order.

Note: A client will be able to view all files that are attached when an order is created. See Communicate with the Client on how to attach files viewable by only an SSI Admin.

5.3.6 Submitting the Order

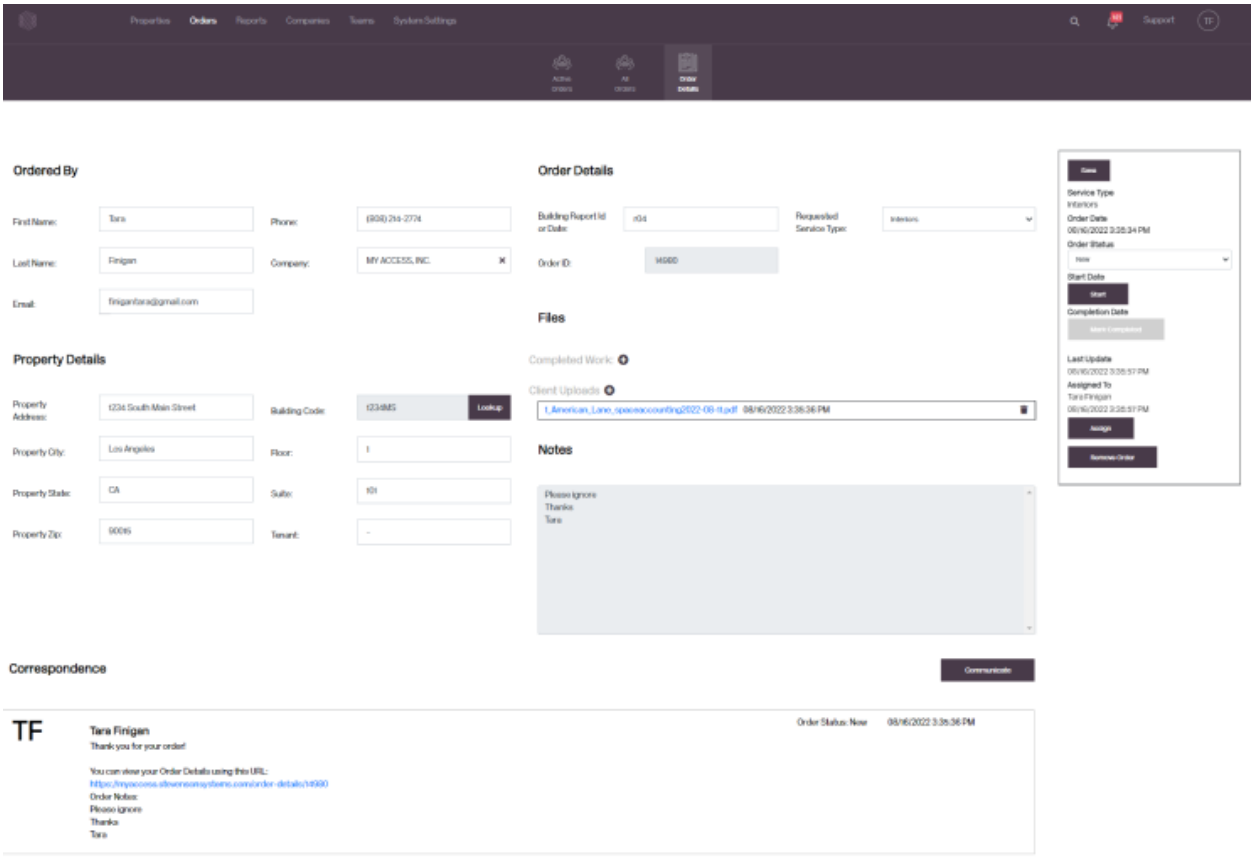
Once all fields are completed, click **Create Order.**

An email will be sent to the email in client information noting that their order has been placed. The email will contain a link for them to login and view their order.
The newly created order will appear in the Active Orders and All Orders tables for both you and the client.

Note: If the email address used in the order is not associated with any properties, the user CAN log in, as they will be required to set up an account. However, they will automatically be a **limited user** therefore they will ONLY see their order and they will NOT see any property information. Click on the links provided to change their user access level or assign them properties.

5.4 Order Details

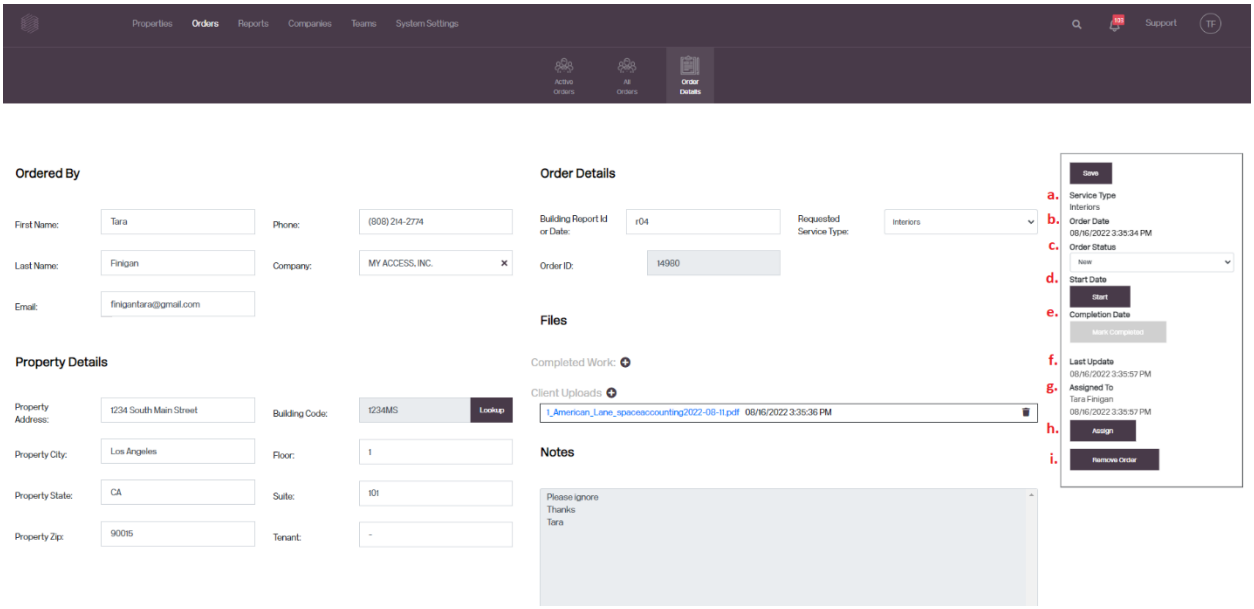
Order Details contain a summary of what the client needs. Here you can **Communicate** with the Client if more information is needed to fulfill their order, and see when the order is started, pending, paused, completed, cancelled, and or closed.



All fields displayed in Order Details are consistent with the fields when creating an order as an SSI Admin. You will notice that under Order Details you will find the **Requested Service Type** and the **Order ID**. These are unique to this order, and are crucial for filtering orders by Service Type within the Active and All Orders pages.

Correspondence is a log of communication between you and the client. The tickets displayed here can be created by clicking Communicate.

The right-hand side of the page displays a **floating bar**, summarizing the order data.

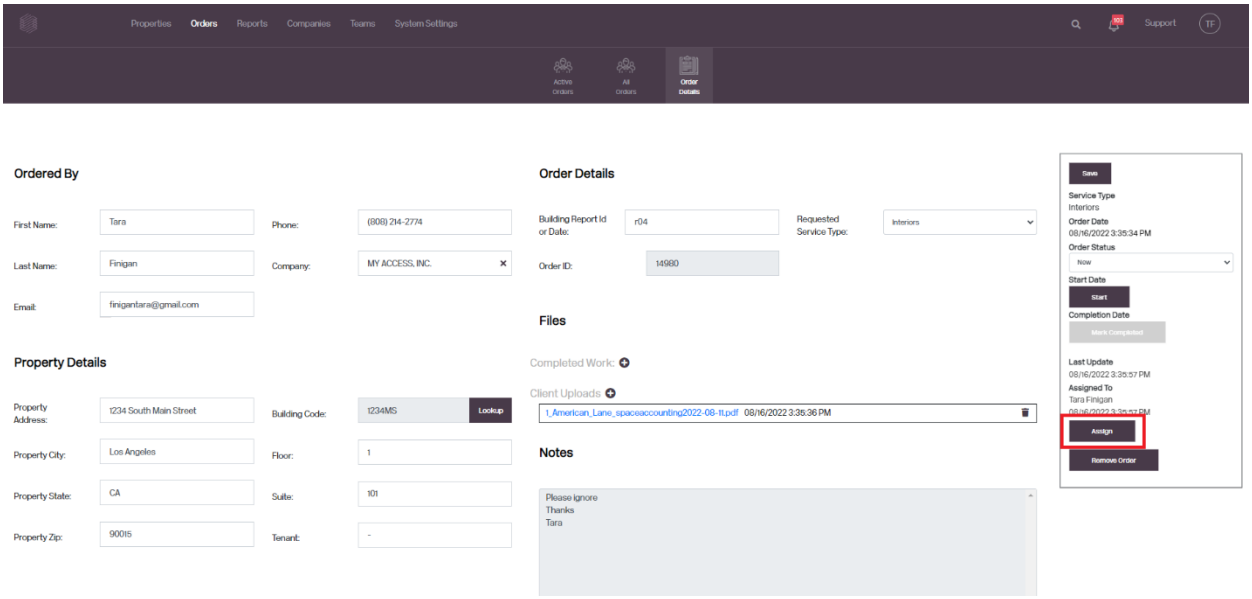


Here you will find:

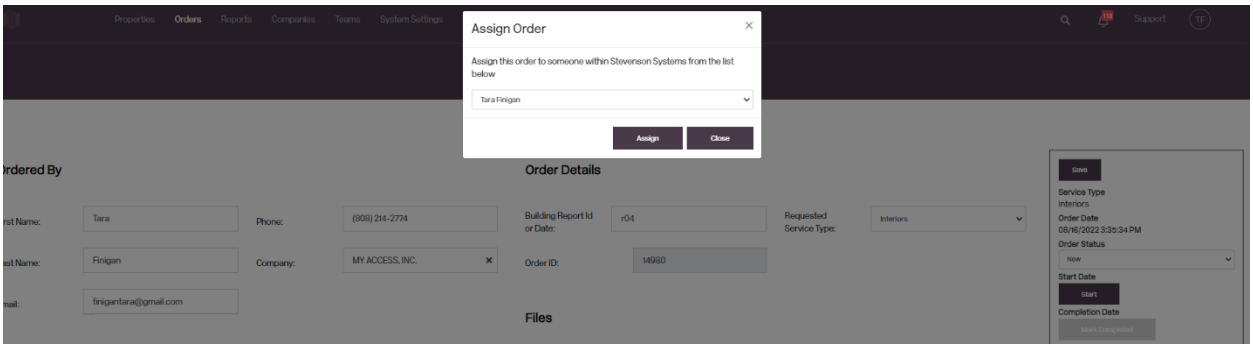
a. Service Type – what type of order was requested
b. Order Date – The original date the order was created
c. Order Status – dropdown allows for you to adjust the order status as you see fit
d. Start Date – the date the order was started
    i. Red pause icon – allows you to pause the order
e. Completion Date – The date the order was marked completed
    i. Mark Completed
f. Last Update
g. Assigned To – the person the order is assigned to and the date and time it was assigned
h. Assign – This will allow you to reassign the order if it is in any order status other than Completed
i. Remove Order – allows you to remove the order from the database

5.4.1 Assign an Order

Before an Order can be started, it needs to be assigned to the SSI Employee that will be working on fulfilling the order.



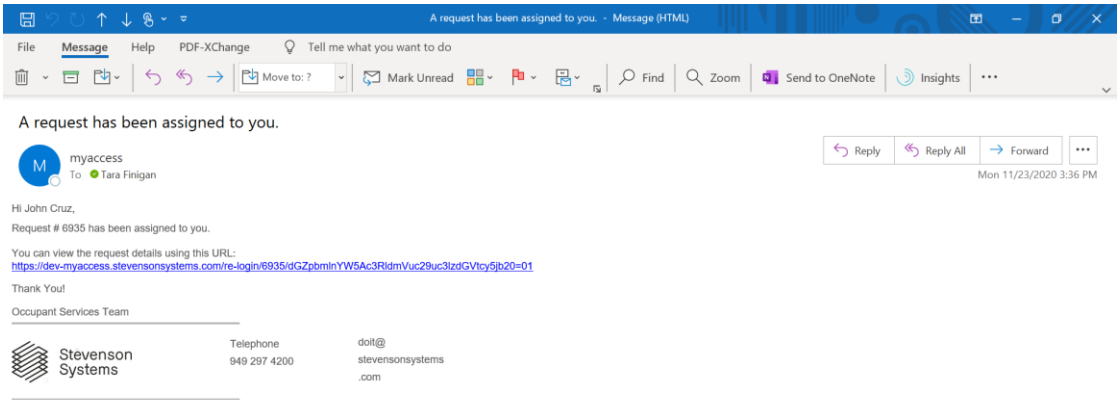
Click **Assign** from the floating bar on the right-hand side of the page.



Select an SSI Employee from the Dropdown.

Click **Assign**.

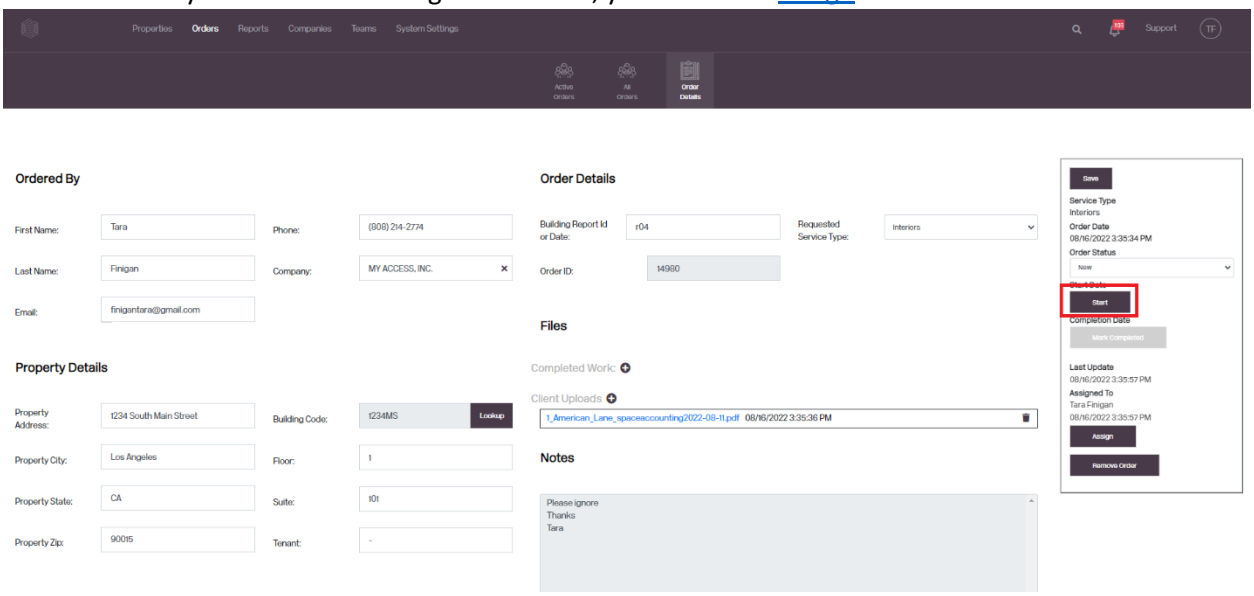
An email will be sent to the SSI employee noting that they have been assigned to fulfill the order. The email will contain a link to the specific order.



NOTE: Once an order has been marked as completed, the order cannot be reassigned.

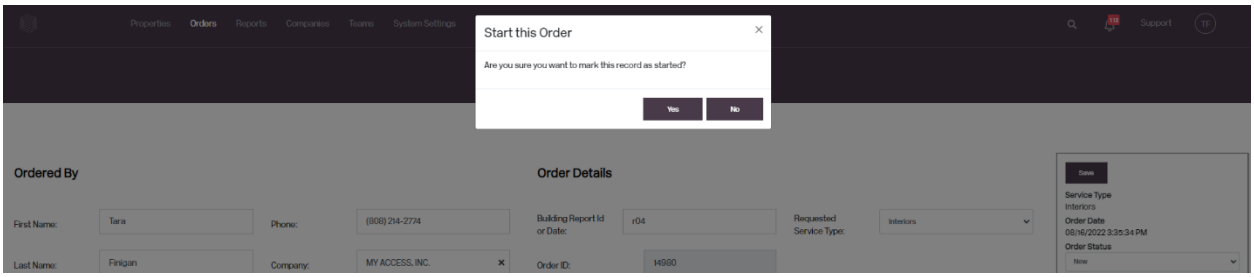
5.4.2 START AN ORDER

Before you can start working on an Order, you first must Assign it to an SSI Associate.



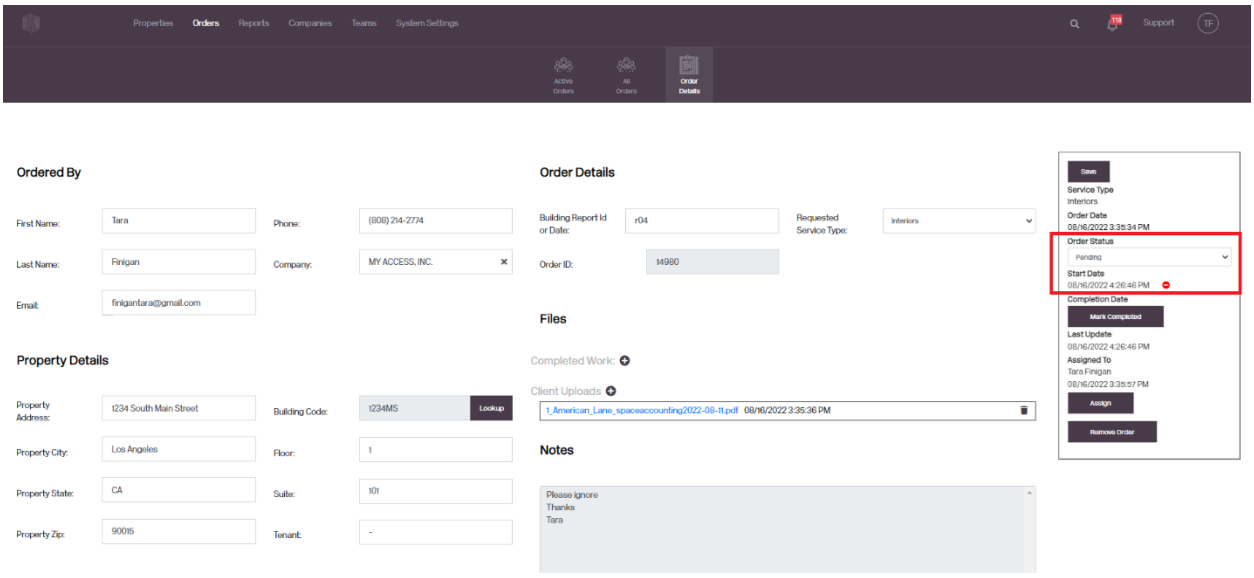
Once the order has been assigned, click **Start.**

The message in the image below will appear, asking you to verify that you are wanting to start the order.



By clicking **Yes,** the order will be marked as started, initiating a change in the order status from "New" to "Pending".

The order will also have a date and time in the **Start Date** column in the **All Orders** and **Active Orders** tables and in the floating bar in the **Order Details** page.



Clicking **Close**, will not start the order and the order status will remain as "New".

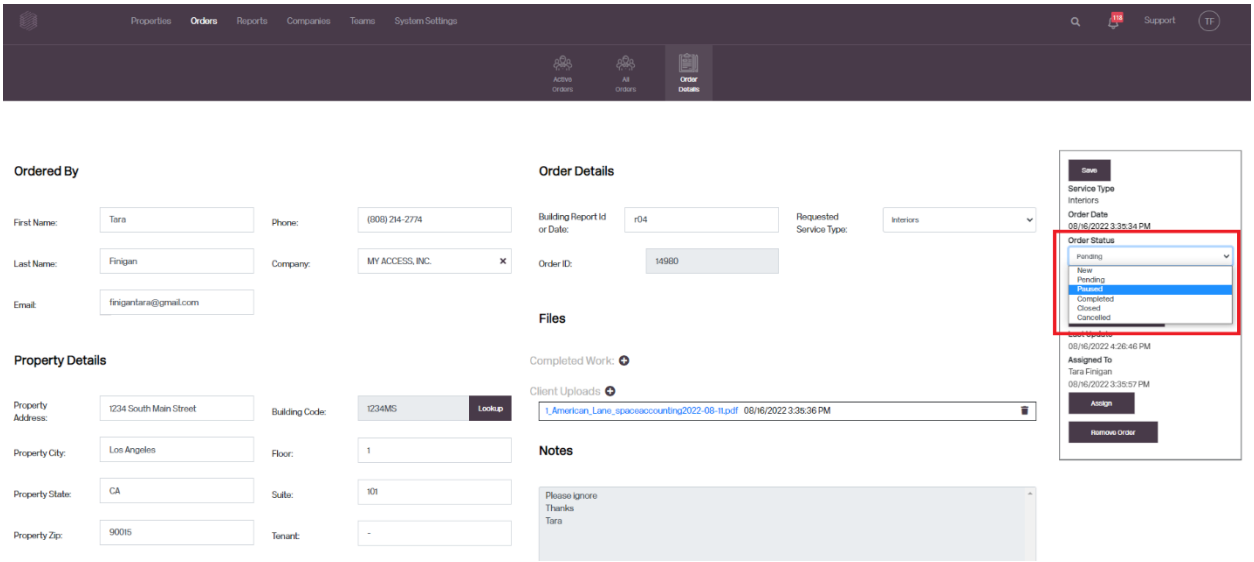
5.4.3 Pause an Order

Once an order is started and if you feel that you need to pause the order, there are 3 ways to do so:

5.4.3.1 Pause Order – Without sending notification to Client

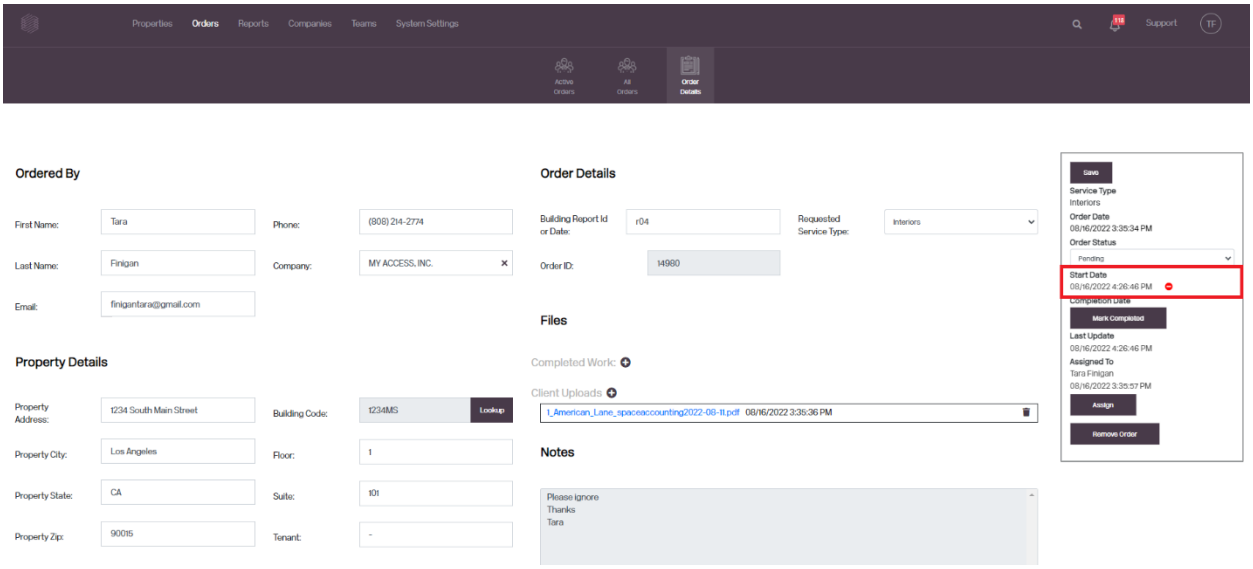
To pause the order without sending a notification to the client:

1. Change the status in the Order Status dropdown to Paused. Click the **Save** button.
    a. When clicking Save, a correspondence log ticket will be displayed noting that the order has been paused.



2. click the **icon** next to Start Date in the floating bar on the right.
    a. The icon will trigger you to confirm that you want to pause the order. Click **Yes** to continue, **Close** to return to Order Details.

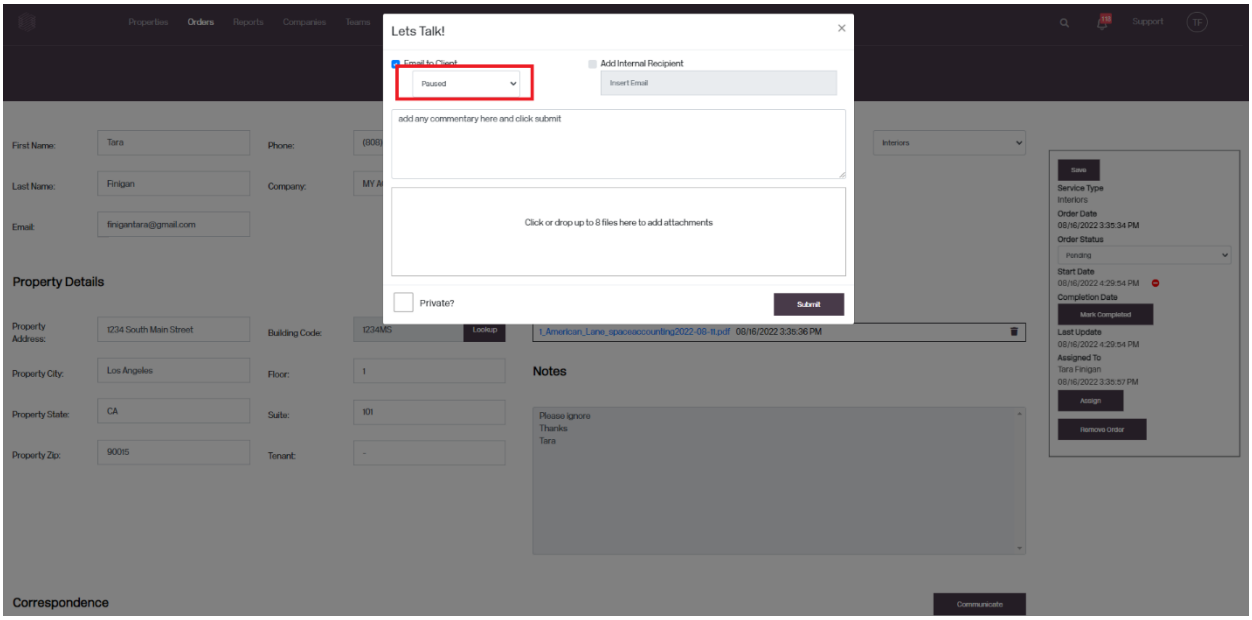
i. When clicking Yes, a Correspondence log ticket will display noting that the Order has been paused.



5.4.3.2 *PAUSE ORDER – WITH SENDING NOTIFICATION TO CLIENT*

To pause the order AND send a notification to the client,

1. Click **Communicate** under the **Correspondence** header.
2. Change the Order Status to **Paused**
3. **Enter the information you need**
4. Click **Submit**



By clicking **Submit** TruSpace will send the notification to the client, display a correspondence ticket with any details you include and change the order status to "Paused". Click **Close** to exit the overlay and cancel pausing the order.

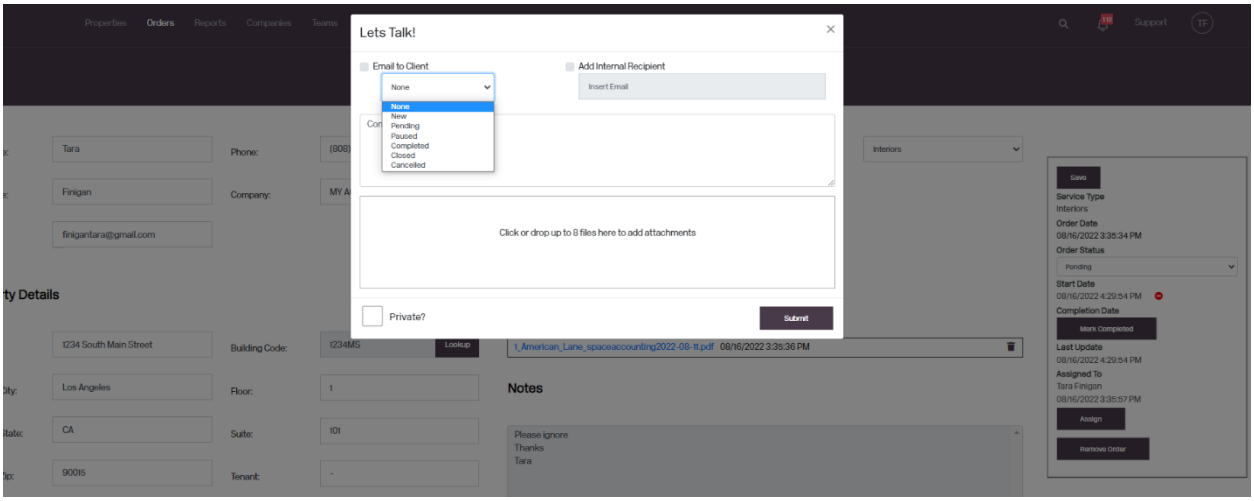
Note: Any files attached will be included under Completed Work in Order Details and will NOT be sent via email to the client.

5.4.4 Communicate with the Client

If you need to communicate with a client, you can do so through the **Communicate** button.

You can also change the status of an order here.

Click **Communicate**.



The comments section contains any correspondence that you have with the client. Files can also be uploaded here for the client's viewing. Here you can change the status of a ticket to New, Pending, Paused, Completed, or Cancelled.

Select a **Status** from the dropdown.

By clicking **Submit**, the contents in the comments section can be found in a ticket under **Correspondence**, files can be found under **Completed Work**, and an email will be sent to the client notifying them that you have communicated with them.

Important to Note:

A client can see all files and comments made unless the **private checkbox** at the bottom of the overlay is ticked and the **Email to Client** is **UNTICKED**.

The contents in the overlay will appear under the correspondence section with a lock icon, meaning **ONLY** an SSI Admin can view its contents. If the Email to Client is ticked, the comments contents will be emailed to the client, but not displayed under the order correspondence log.

5.4.4.1 Cancelling an Order

All users can cancel an order. If you need to cancel an order for any reason, you can change the status of the order within the **Communicate** overlay or change the status in the **Order Status** dropdown in the floating bar.

5.4.4.1.1 Cancel Order with Adding Comments for Client

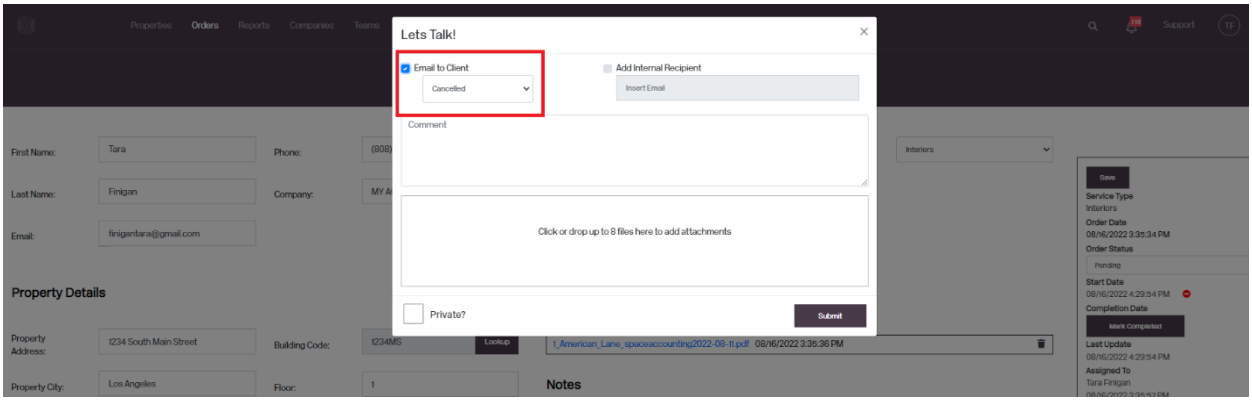
To Add Comments to send to a client when Cancelling an Order, you will cancel the order via the Communicate button.

Click **Communicate**.

Change the **Status** of the Order in the dropdown to Cancelled.

Add why the order is being cancelled to the **Comments**.

Click **Submit**.



The order will display as Cancelled for both an SSI Admin and for a client in All Orders and when clicking on the Order Details.

5.4.4.1.2 Private Correspondence

A client can see all files and comments made unless the **private checkbox** at the bottom of the overlay is checked.

When checked the contents in the overlay will appear under the Correspondence section with a lock icon. **ONLY** an SSI Admin can view its contents.

5.4.4.2 Activating an Existing Order

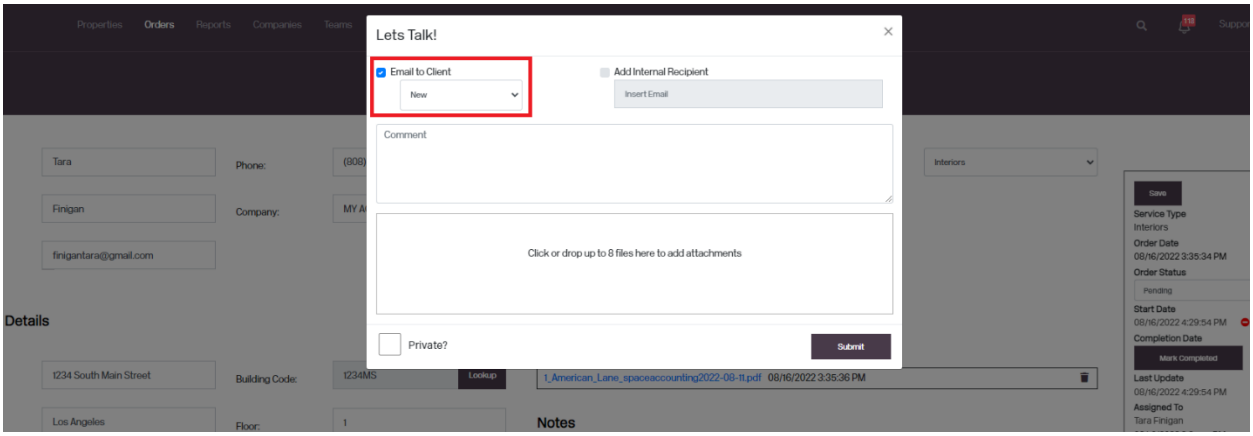
If an order was cancelled and needs to be reactivated, only an SSI Admin can reactivate it.

From the order details page, click **Communicate**.

Change the status of the order in the dropdown to **New.**

Include in the **Comments** why the order is being reactivated.

Click **Submit.**



The order will display as New for both an SSI Admin and for a client. The order can be found in **Active Orders** and in **All Orders**.

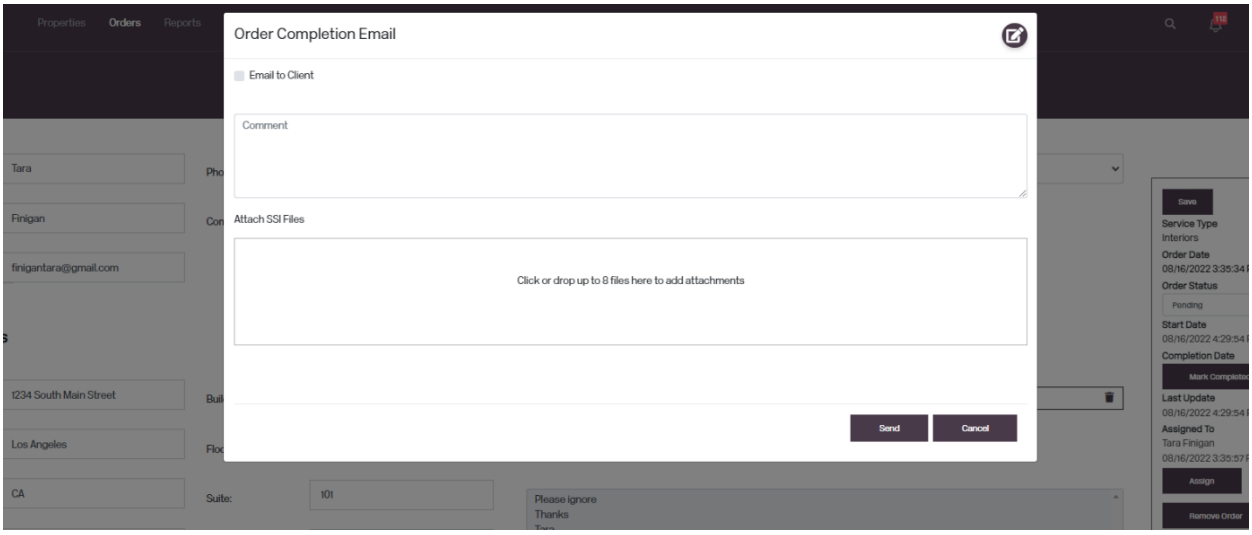
5.4.5 Complete an Order

Once an order has been fulfilled, click **Mark Completed.** The checkbox at the top of the overlay labeled "Email to Client" will be checked, displaying an email template will appear to be sent to the client from the doit@stevensonsystems.com inbox.

If you do not want to send an email to the client notifying that their order has been completed, uncheck the checkbox.

5.4.5.1 Marking Order as Complete without Sending Completion Email

The Mark completed button displays an overlay containing a template email to be sent to the client. The default is that the **Email to Client Checkbox** is unchecked.

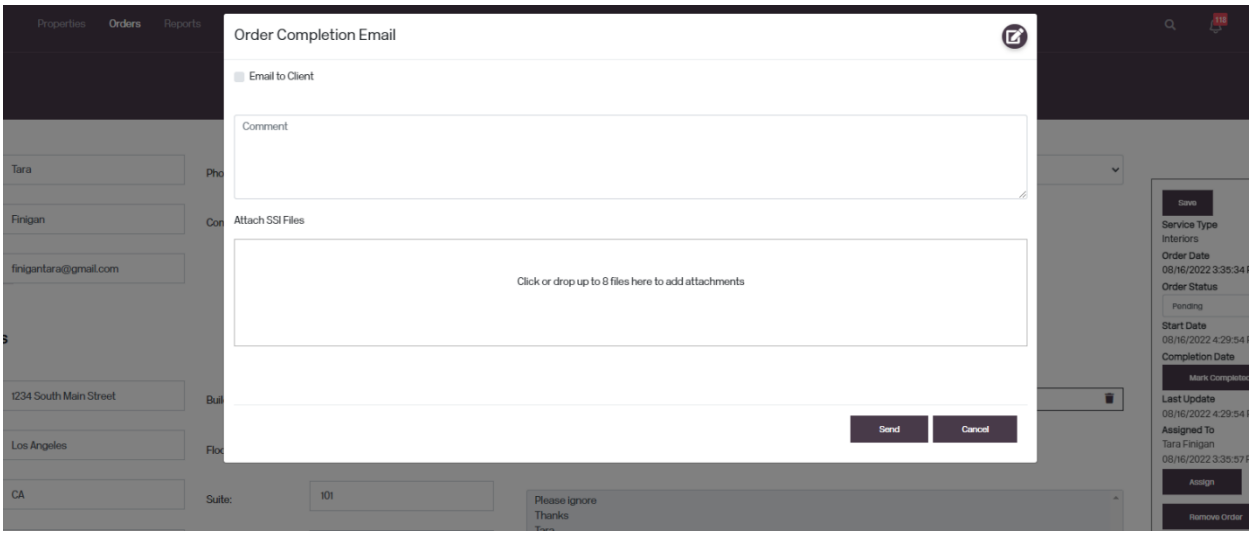


Fill in the comments section with details regarding the order. These will be displayed in a **Correspondence** ticket for the client and SSI Admin to view.

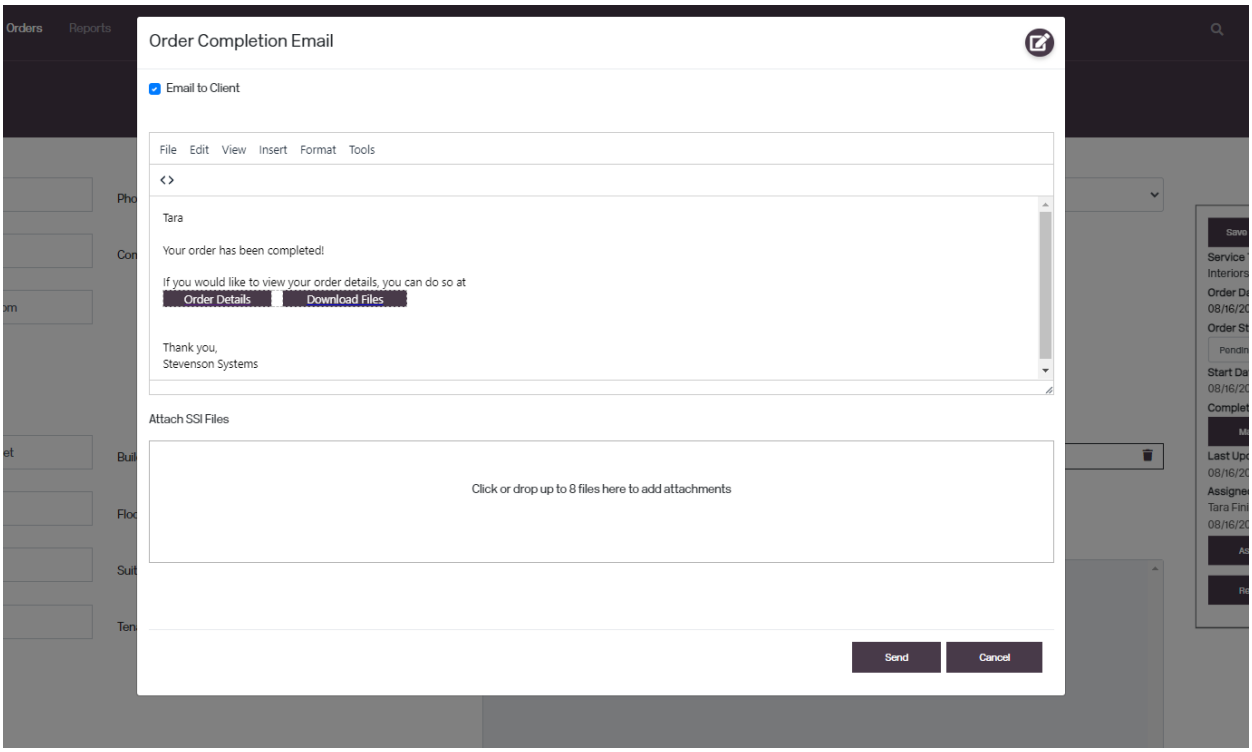
Click **Submit**.

5.4.5.2 *Sending Completion Email*

The **Mark Completed** button will display the overlay below.



The **Email to Client checkbox** will be defaulted to unchecked. Click on the **Email to Client checkbox.**

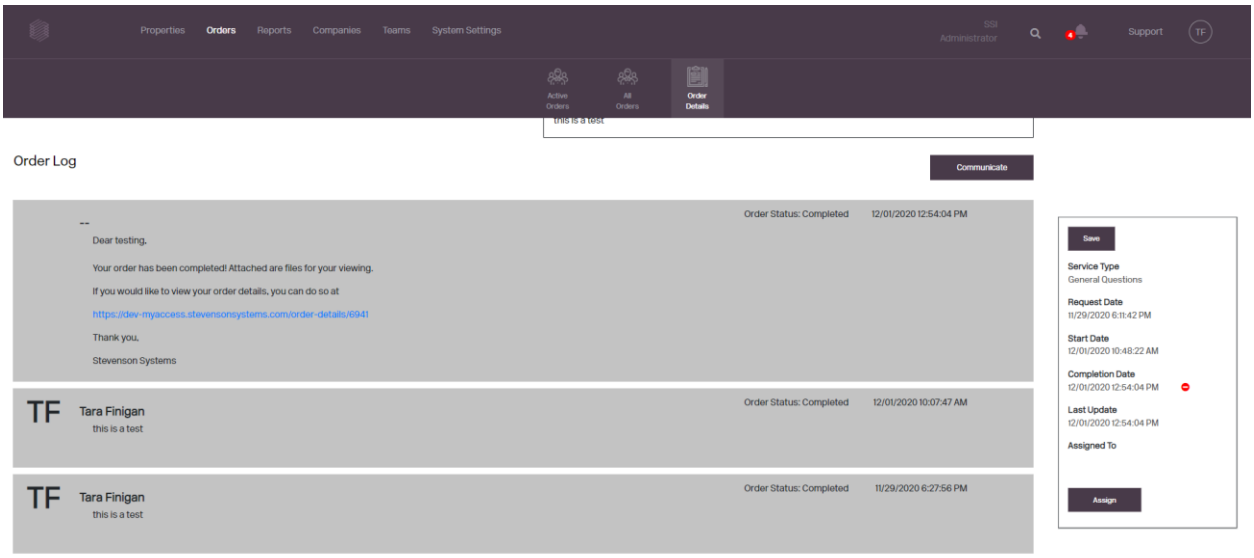


Click into the text to edit the email body. Include any files under **Attachments**.

NOTE: Attached files will be viewable only in the order details page. The client will receive a link to the order details page where they can then download the files.

Click **Send** to send the email to the client. Click **Cancel** to return to order details without marking the order as complete.

Sending the email will trigger a new Correspondence ticket containing an Order Status as "Completed", a date and time stamped under Completion Date and the order will be removed from the **Active Orders** tab and housed only in **All Orders.**



5.4.5.3 Client Response to Completion Email

If a client responds to an email regarding an order, the reply is sent to the doit@stevensonsystems.com inbox.

If the client has asked for additional work regarding that order, you can go to the order, click the **icon**, next to the **Completion Date**. Then click **Communicate** and fill in the additional request made. ***Be sure to click the private checkbox if you do not want the client receiving the contents of the log.***

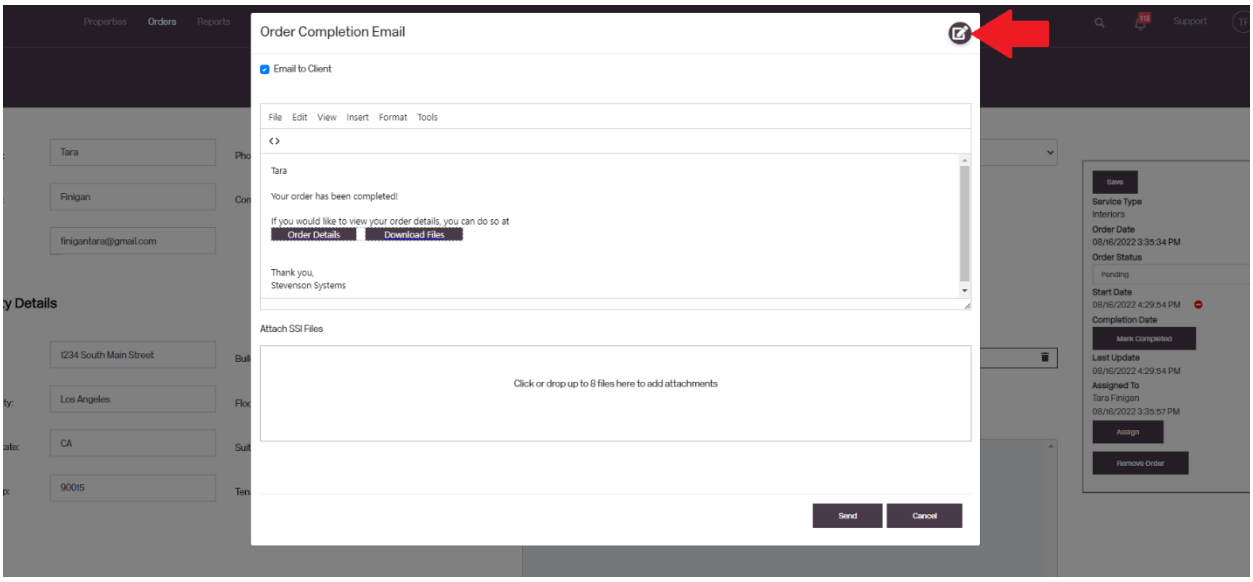
5.4.5.3.1 Client Response Email

TruSpace will check to see if the incoming email has a specific order number in the subject line. If the email does, a new correspondence ticket will be created under the specified order. If the email does not, a new order will be created and placed under Active Orders.

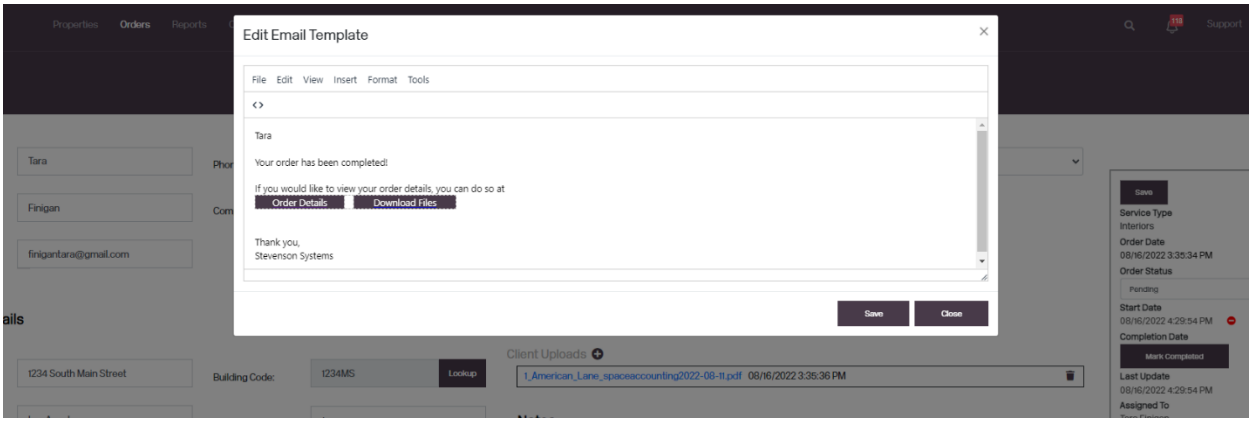
If duplicate orders occur, an option to **Remove the Order** is given in the floating bar under Order Details.

5.4.5.4 Editing Completion Email Template

To edit the completion email template, click **icon**.



Here you can change what your email template will say.

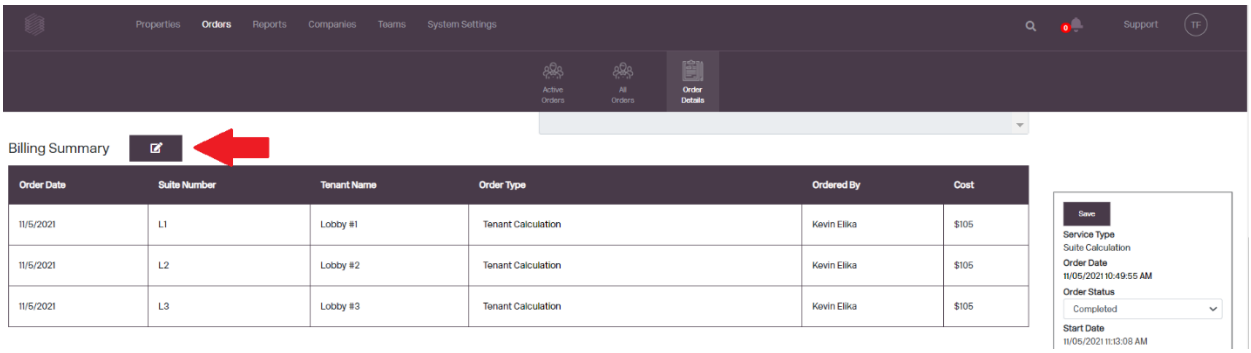


Click **Save** to save any changes made.

Click **Close** to return to the completion email without saving.

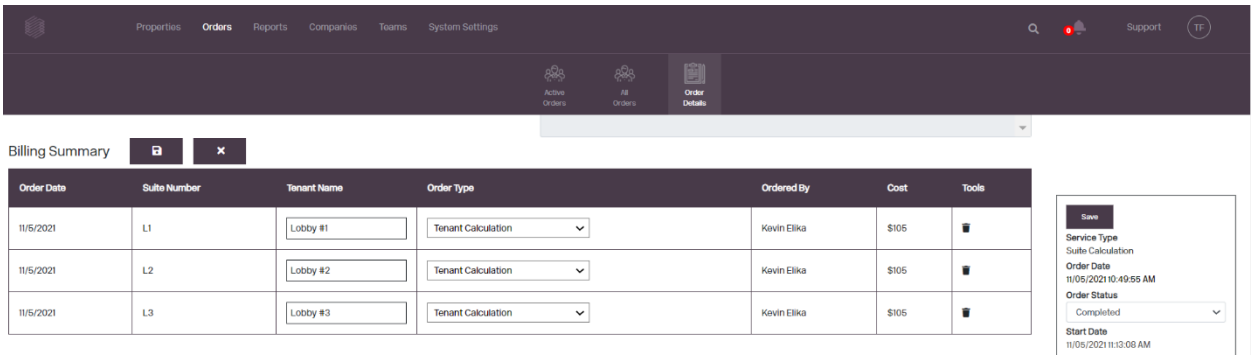
5.4.6 Work Summary

For the work summary to be displayed, the BILL command must be run in CAD.



5.4.6.1 Editing Work Summary

Once information is imported to TruSpace from CAD, SSI Admins can edit the work summary by clicking the **icon**.

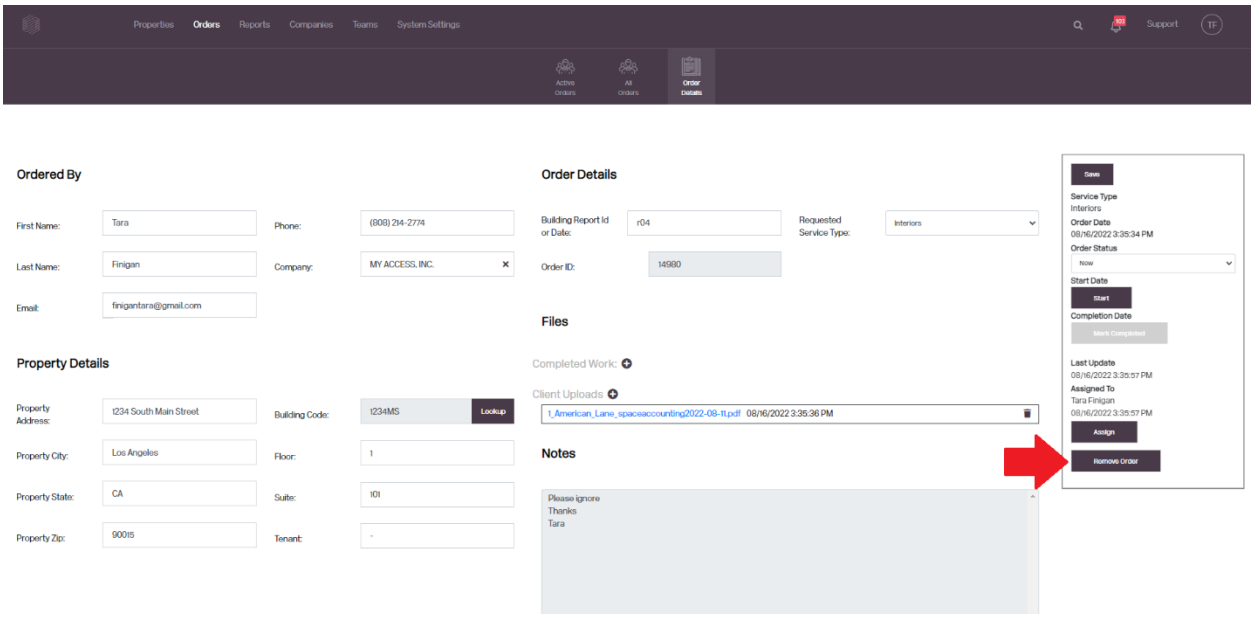


When in **Edit** mode, an SSI Admin can then edit all fields in the work summary table.

NOTE: *Clients are directly able to see what an SSI Admin edits in the work summary. If you are wanting to create a private message for SSI view ONLY, click the Communicate button and check the Private Checkbox..*

5.4.7 Remove Order

If a duplicate Order occurs SSI Admins **ONLY** can remove the order or merge it with an existing order.

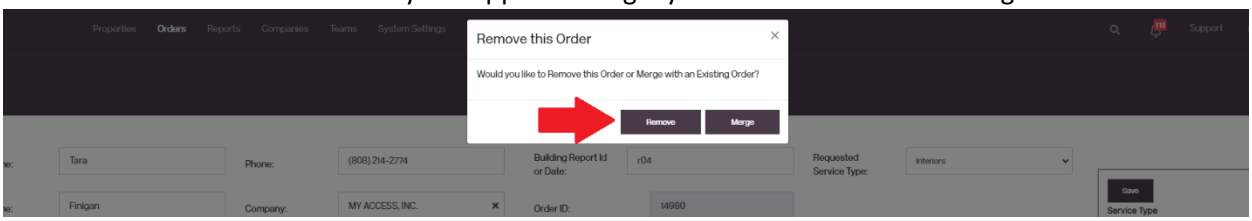


4.1.1.1 Removing an Order

By removing the order, you are removing it from the database, meaning that you may not access the order at any point after it is removed.

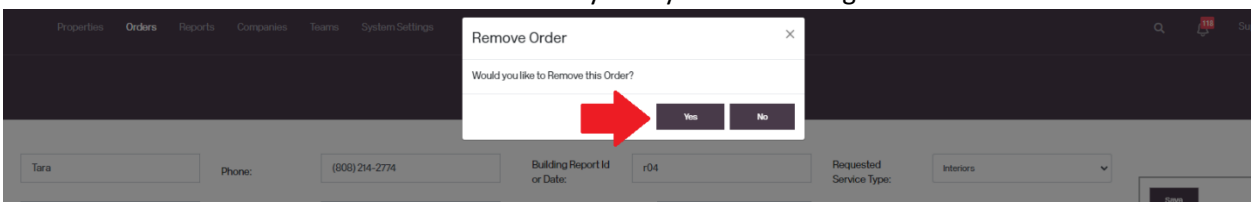
Click **Remove Order**.

An overlay will appear asking if you want to Remove or Merge the order.



Click **Remove**.

You will be asked to verify that you are wanting to remove the order.



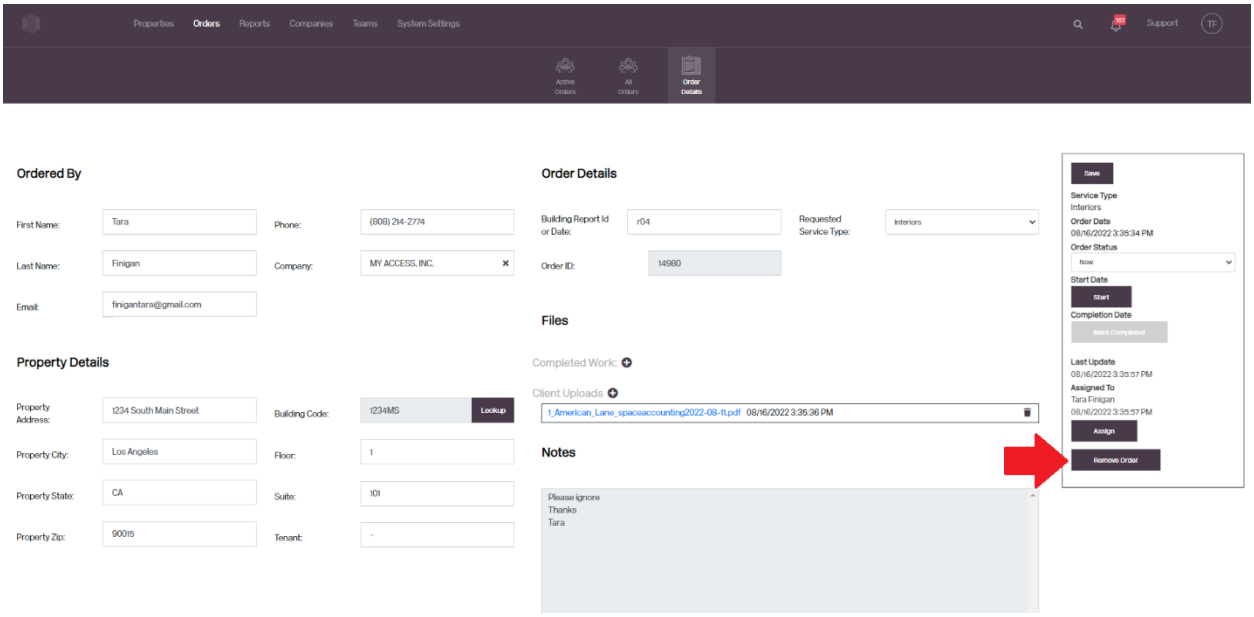
Click **Yes**.

The order is now removed from the database.

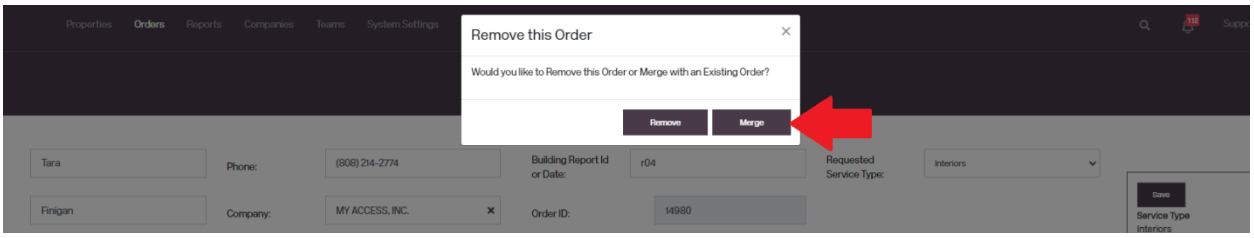
4.1.1.2 MERGING AN ORDER

By merging an order, you are adding the **notes** and **files** included in one order to an existing order.

From Order Details, click the **Remove Order** button from the floating bar.

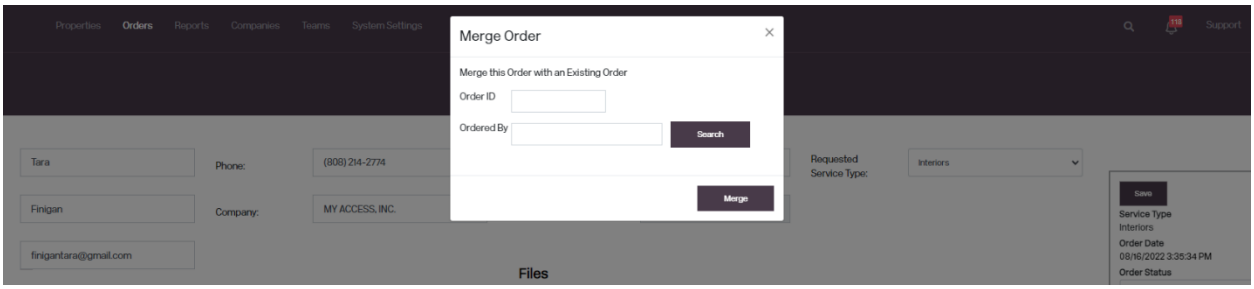


Click **Merge**.



An overlay will appear in which you can input information about the existing order you are merging into.

Fill in the **Order ID** and/or **Ordered By** details and click **Search**.



All Orders associated with the search details will be displayed.

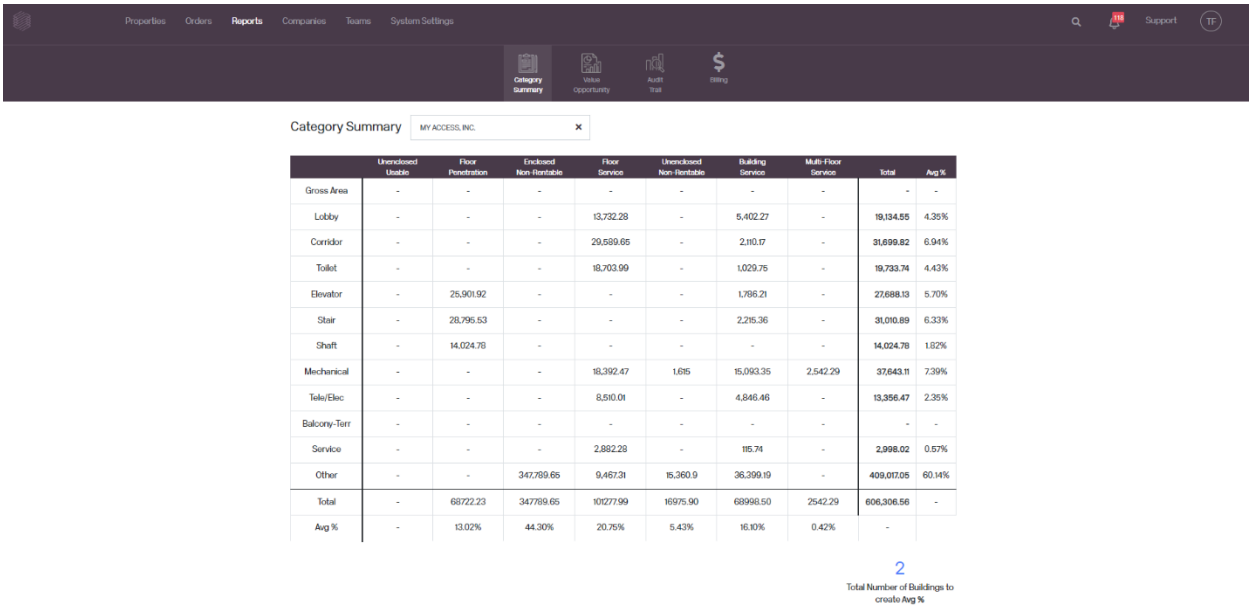
Select the appropriate order. Click **Merge**.

6.0 REPORTS

Reports displays all finalized and preliminary results for all your buildings.

6.1 CATEGORY SUMMARY

Report Category Summary displays area by specified space for all **finalized** buildings for the company selected.

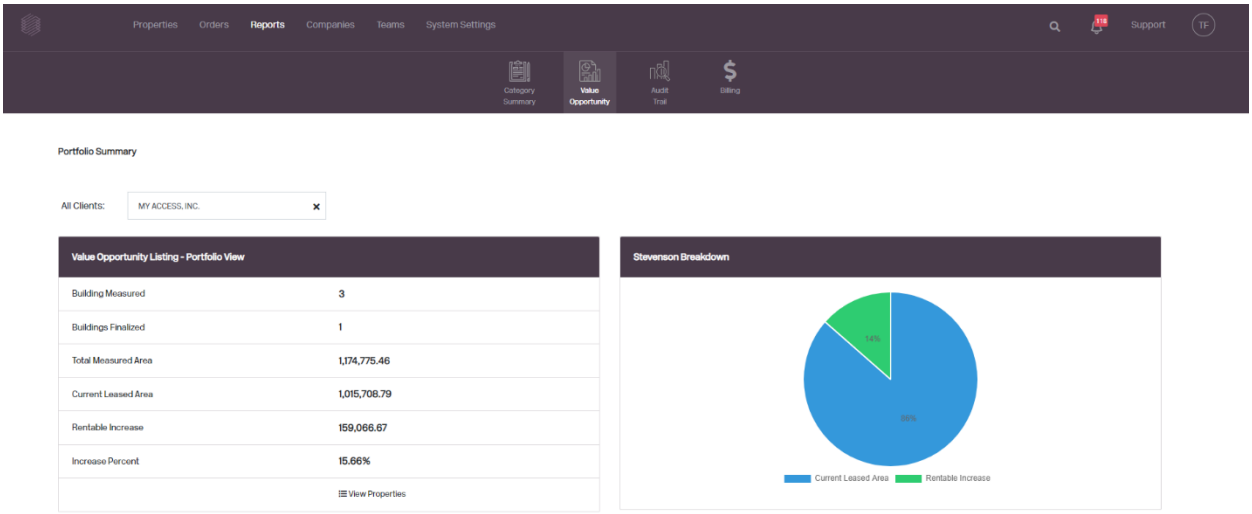


	Unenclosed Usable	Floor Penetration	Enclosed Non-Rentable	Floor Service	Unenclosed Non-Rentable	Building Service	Multi-Floor Service	Total	Avg %
Gross Area	-	-	-	-	-	-	-	-	-
Lobby	-	-	-	13,732.28	-	5,402.27	-	19,134.55	4.35%
Corridor	-	-	-	29,589.65	-	2,110.17	-	31,699.82	6.94%
Toilet	-	-	-	18,703.99	-	1,029.75	-	19,733.74	4.43%
Elevator	-	25,901.92	-	-	-	1,786.21	-	27,688.13	5.70%
Stair	-	28,795.53	-	-	-	2,215.36	-	31,010.89	6.33%
Shaft	-	14,024.78	-	-	-	-	-	14,024.78	1.82%
Mechanical	-	-	-	18,392.47	1,615	15,093.35	2,542.29	37,643.11	7.39%
Tele/Elec	-	-	-	8,510.01	-	4,846.46	-	13,356.47	2.35%
Balcony-Terr	-	-	-	-	-	-	-	-	-
Service	-	-	-	2,882.28	-	115.74	-	2,998.02	0.57%
Other	-	-	347,789.65	9,467.31	15,360.9	36,399.19	-	409,017.05	60.14%
Total	-	68722.23	347789.65	101277.99	16975.90	68998.50	2542.29	606,306.56	-
Avg %	-	13.02%	44.30%	20.75%	5.43%	16.10%	0.42%	-	

2
Total Number of Buildings to create Avg %

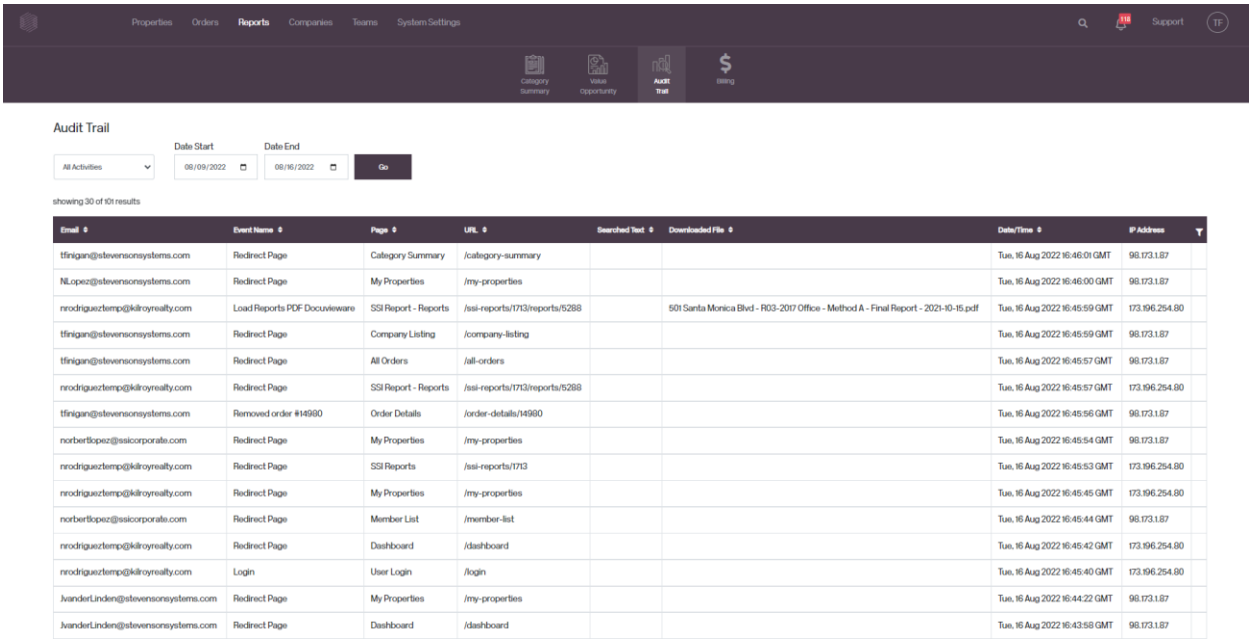
6.2 VALUE OPPORTUNITY

Value Opportunity is a graphical representation of the area Stevenson Systems has gained for final reports during the measurement process for the company selected or all clients.



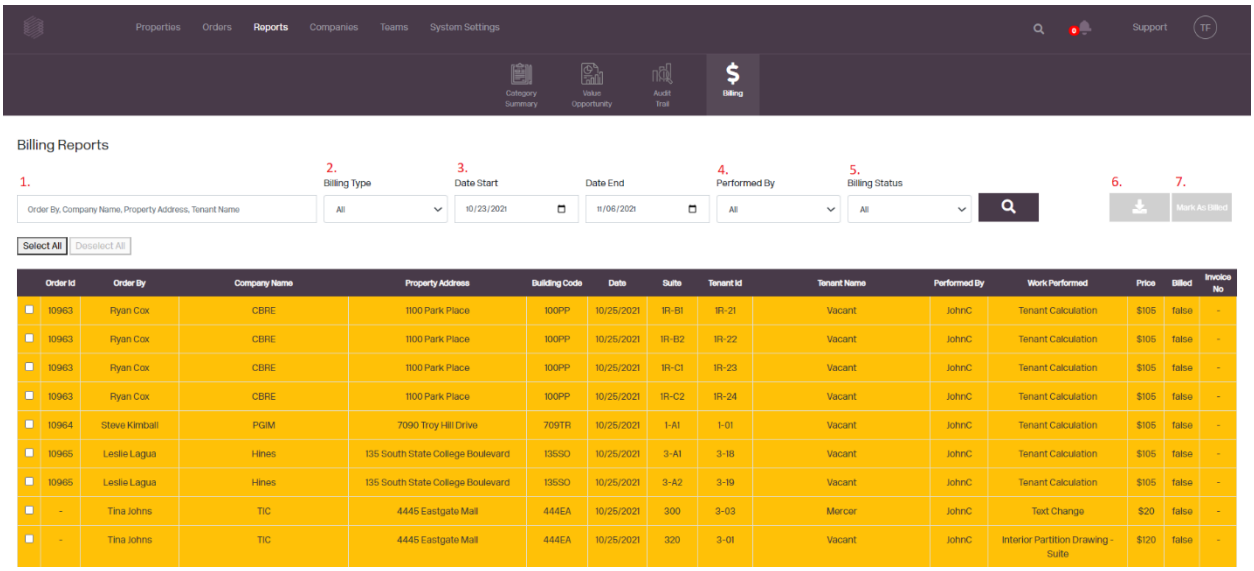
6.3 AUDIT TRAIL

The Audit Trail allows for reporting on client usage of the site. The current design/functionality of this page will be updated.



6.4 BILLING REPORT

Billing Report enables an SSI Admin to see those orders that have been completed and are ready to be billed.



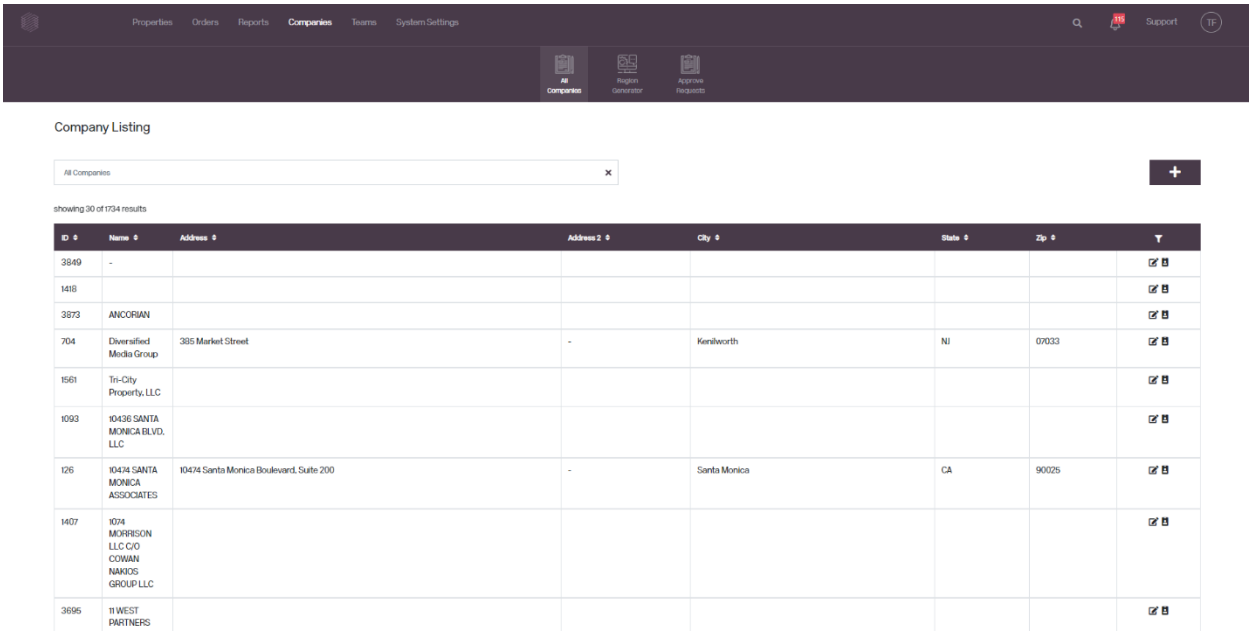
1. Table Search – You can search by who ordered it, company name, property address, tenant name
2. Billing Type – comparable to work performed in table. Here you can filter by specific work type.
3. Date Start/Date End – Range to filter orders by date they were placed.
4. Performed By – filter by the SSI Associate that performed the work for the order.
5. Billing Status – filter by those items that have been billed and those that haven't.
6. Download – download an excel sheet of items in the table

7. Mark as Billed – when items are selected, you can mark them as billed individually or in multiples.
    a. Those items highlighted in orange are those that have not been billed. Those items highlighted in green are those that have been billed.

7.0 COMPANIES

7.1 ALL COMPANIES

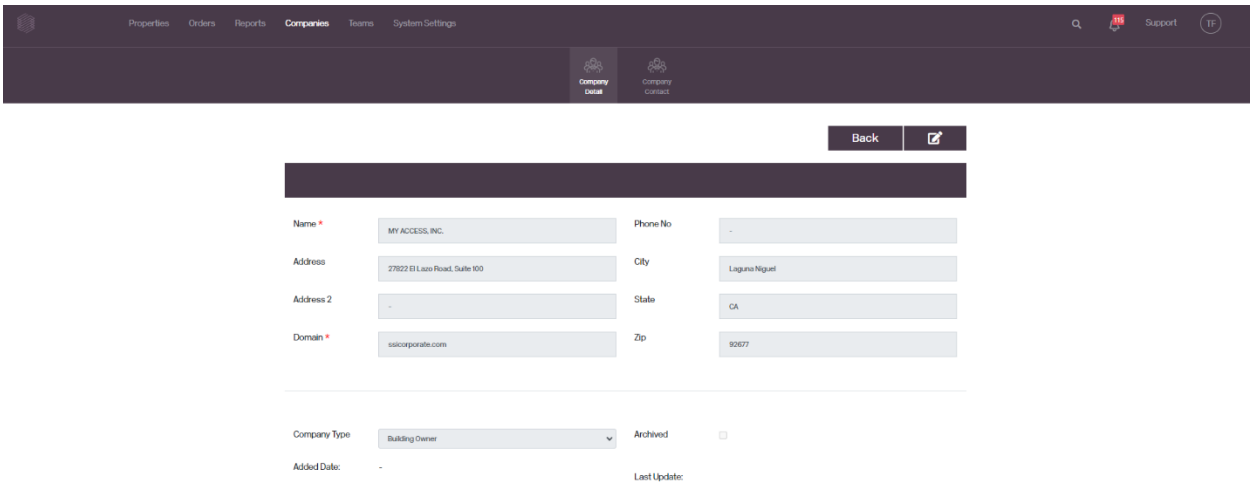
The Company Listing displays all the companies that are in our database.



ID	Name	Address	Address 2	City	State	Zip
3849	-					
1418						
3873	ANCORIAN					
704	Diversified Media Group	385 Market Street	-	Kenilworth	NJ	07033
1561	Tri-City Property, LLC					
1093	10436 SANTA MONICA BLVD, LLC					
126	10474 SANTA MONICA ASSOCIATES	10474 Santa Monica Boulevard, Suite 200	-	Santa Monica	CA	90025
1407	1074 MORRISON LLC C/O COWAN NAKIOS GROUP LLC					
3695	11 WEST PARTNERS					

7.1.1 COMPANY DETAILS

By clicking the edit icon in the table, you will be redirected to Company Details page. This contains basic information about the company.

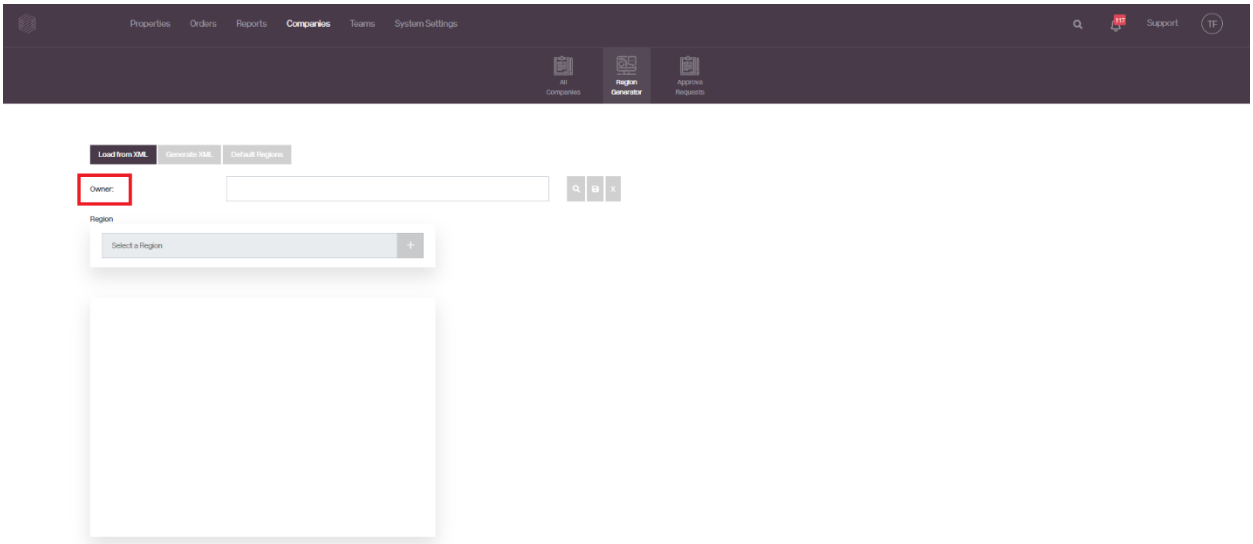


When editing the company details, the two required fields are **name** and **domain**.

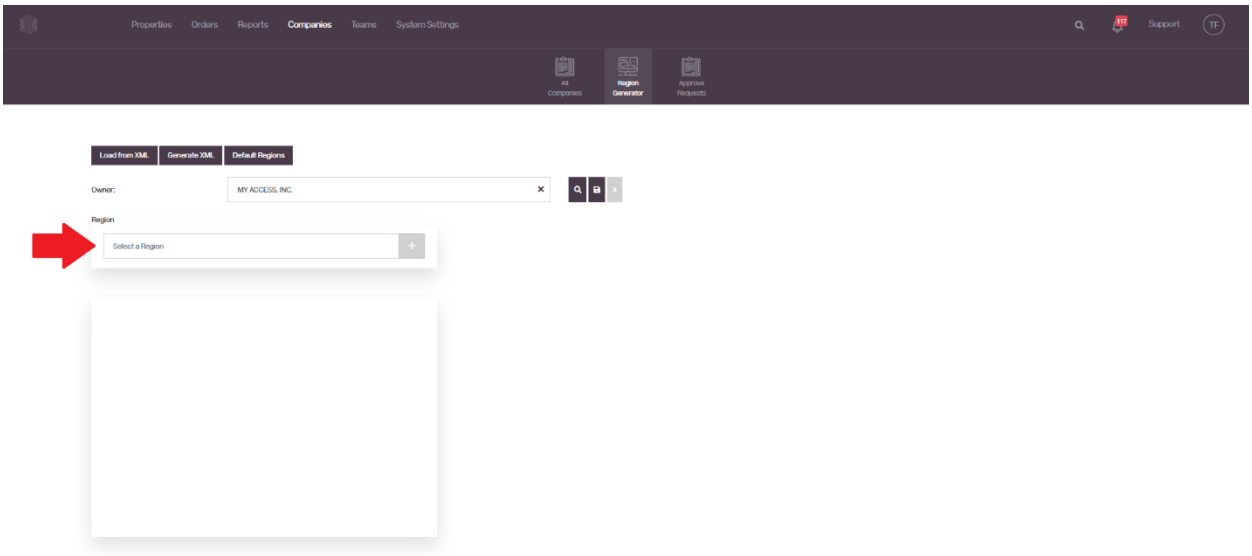
7.2 Region Generator

A company can create regions based on any criteria they prefer.

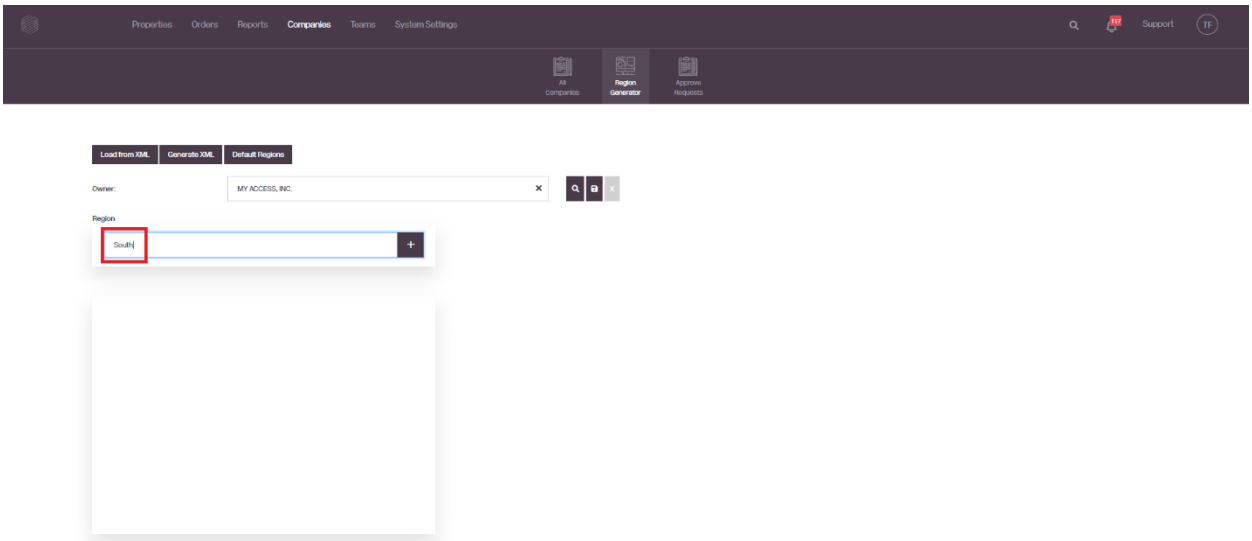
Select an Owner from the list.



Once selected, the region field is editable.

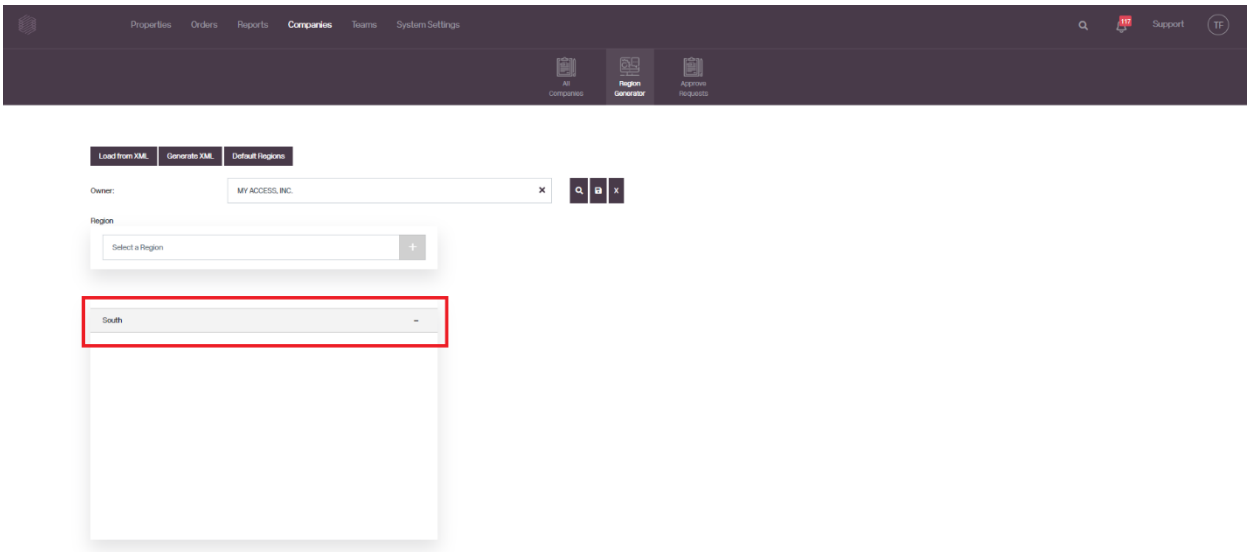


Type in the desired region.

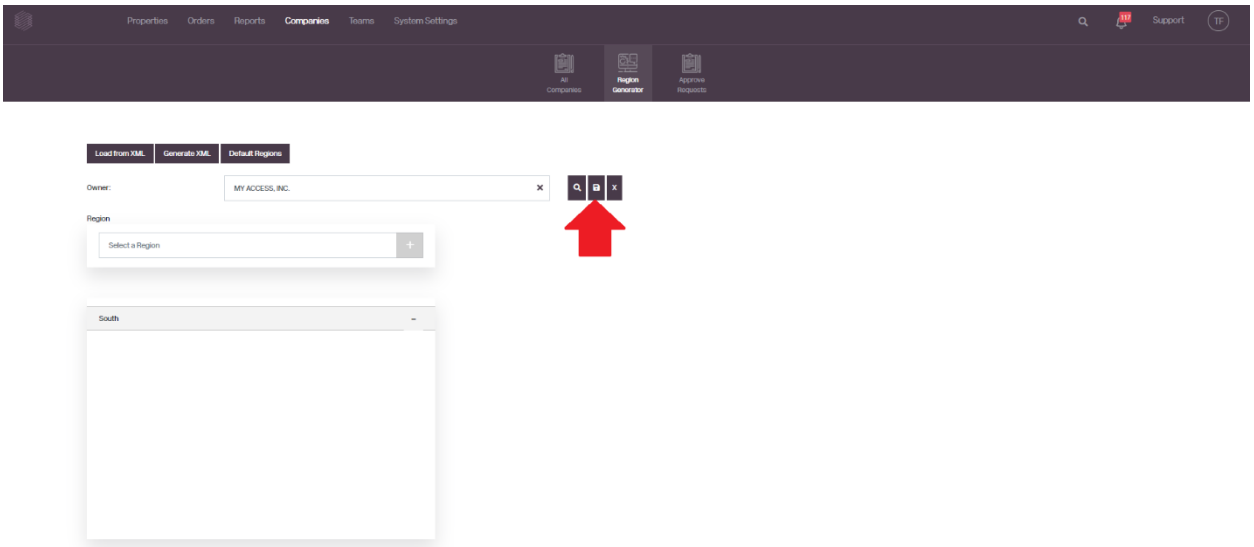


Click the + icon.

The region will show in the listing. All regions within this listing can be assigned to any property within the company on the Property Summary page.



Click the Save button to save any updates.

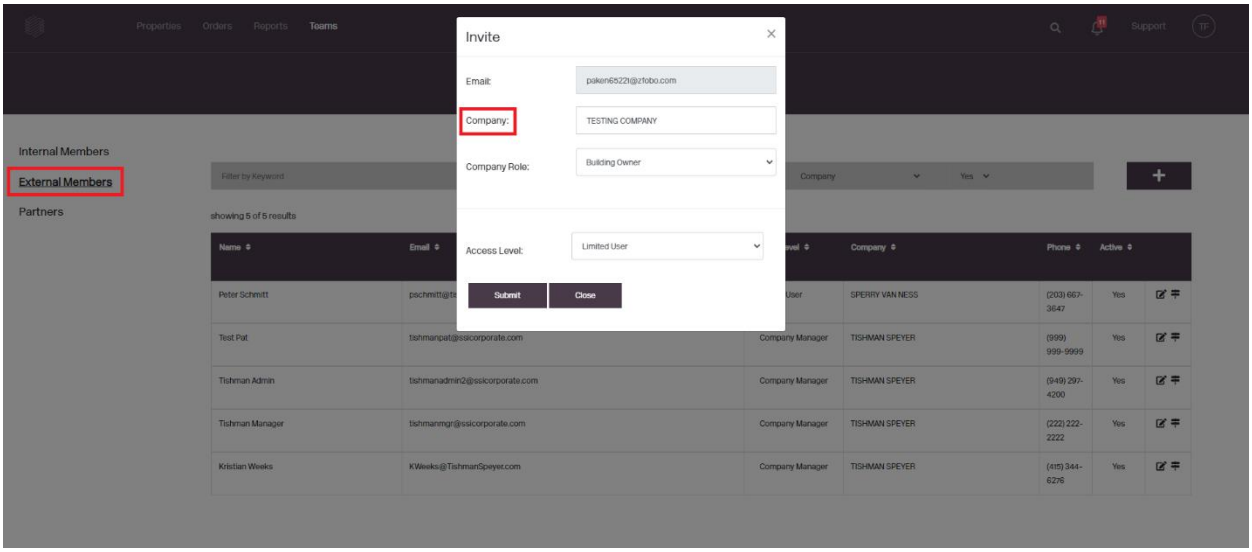


7.3 Approve Requests

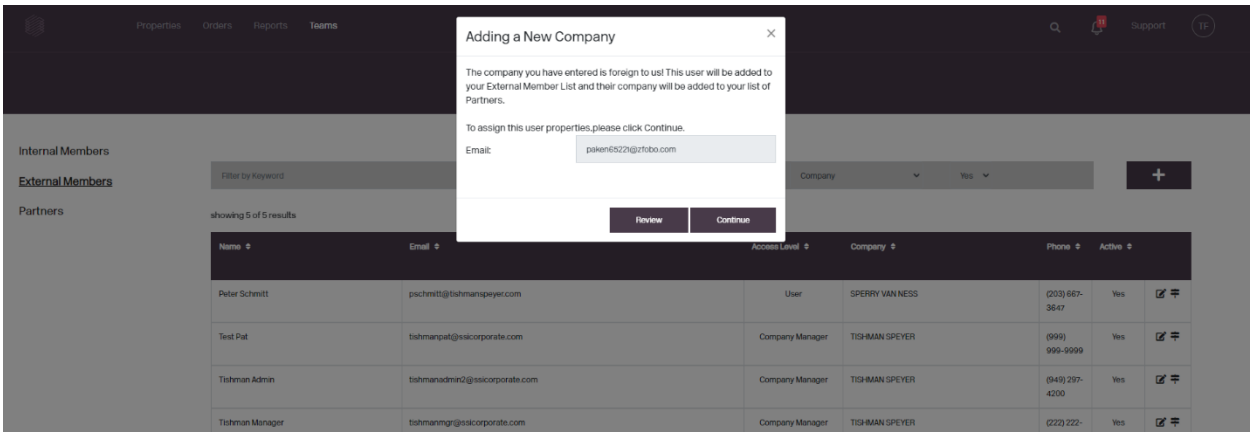
If a user has been invited to TruSpace and their domain is not in the system, the company administrator or manager are prompted to add a company to match the new domain. The company will not be added to our company listing until it is approved by an SSI Admin.

Approve Requests allows for you to approve of these companies.

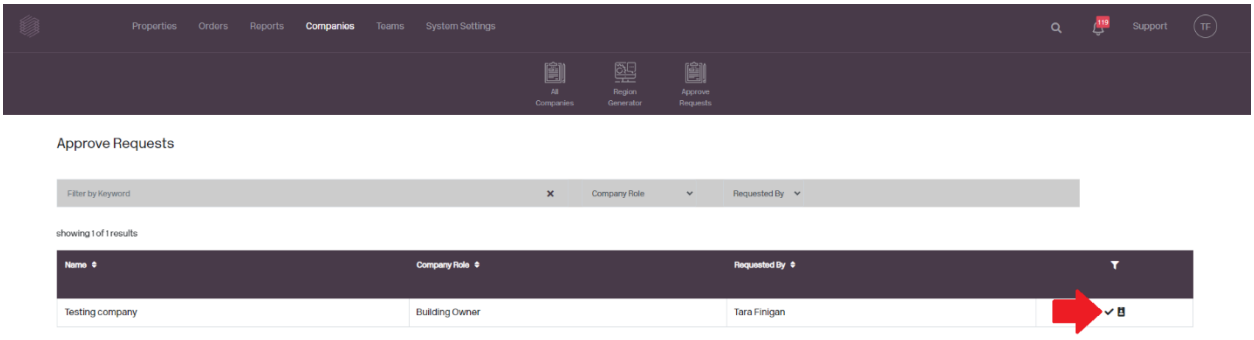
A company administrator or manager will add a company similar to the screenshot below.



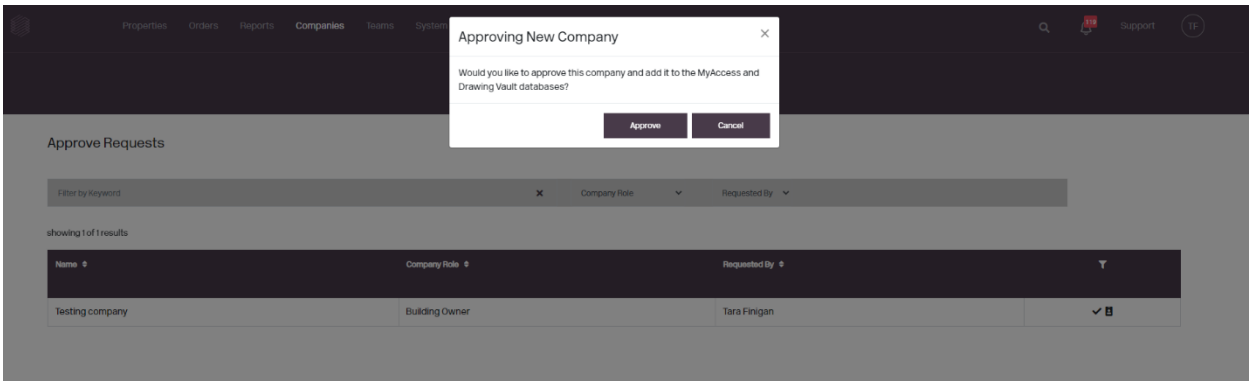
Once they click Submit, they are asked to verify the information.



Once they click **Continue**, the company is displayed in the **Approve Requests** table.

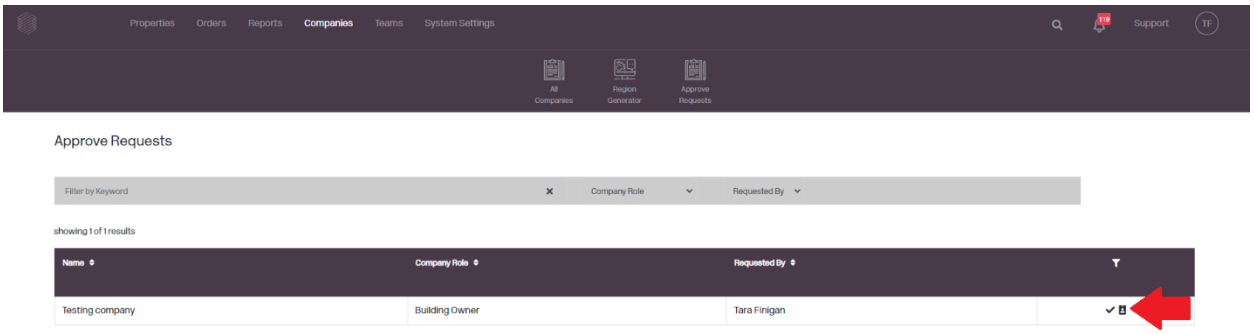


By clicking on the checkmark, you are approving the company. Once selected, you will be asked to verify.

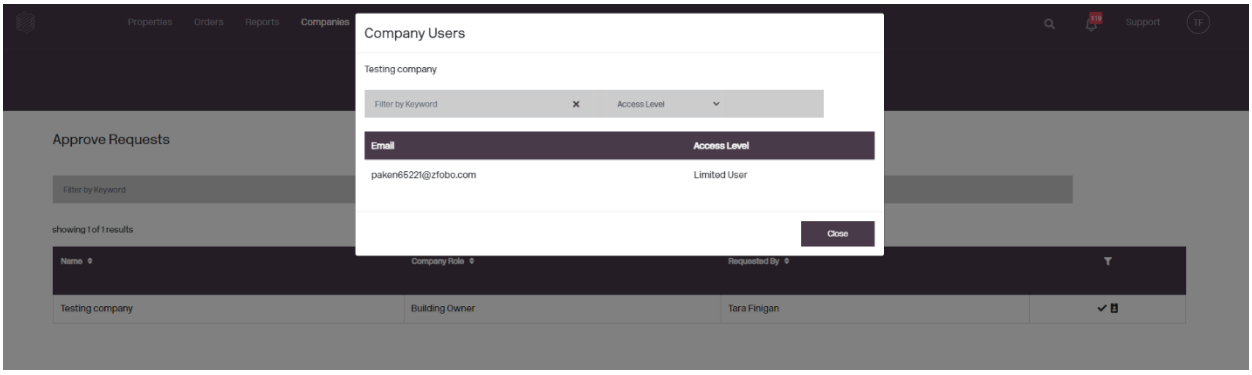


Clicking **Approve** to move the company into the **Company Listing** table.

To see what users are associated to the company, click on the **Company Users** icon.



The email and access level of the associated users are displayed in an overlay.

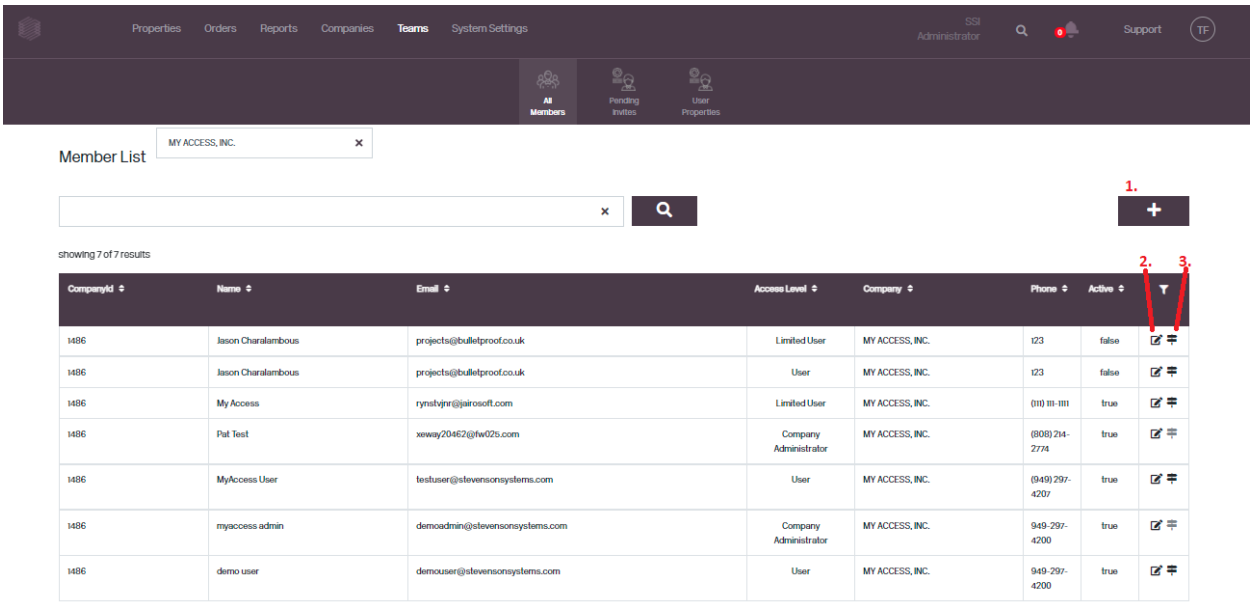


8.0 TEAMS

Teams allows for you, as an SSI Admin, to view all individuals that have been invited to TruSpace. You can adjust a user's account via Member Details or change the properties they have access to via Property Mapping.

8.1 All Members

All Members displays the members that have accepted their TruSpace invitation. Here you can **Invite** a new member to TruSpace (1), edit an existing member's profile (2), and edit the properties that an existing member has access to (3).



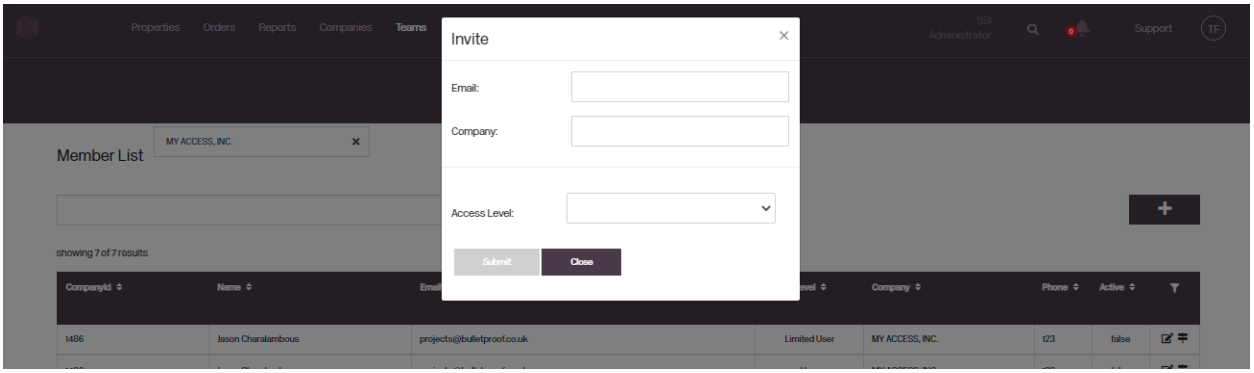
8.1.1 Inviting a Member

Click **the plus icon** to invite a member to TruSpace.

Enter the email address of the new user.

Enter their associated company and assign them a user role.

Click Submit.



8.1.1.1 Inviting a New User

If the user's email does not exist in the TruSpace database, you are redirected to **Property Mapping** to assign the user specific properties that you want them to view.

8.1.1.2 *Inviting an Existing User*

If the email of the user you are inviting exists in the database and they have accepted their invitation, you have two options. You can edit their member details in which you can change their access level from a limited user to a user or a company manager or a company admin, or you can edit the properties they have access to.

Click **Member Details** or **Property Mapping** to edit the respective fields.

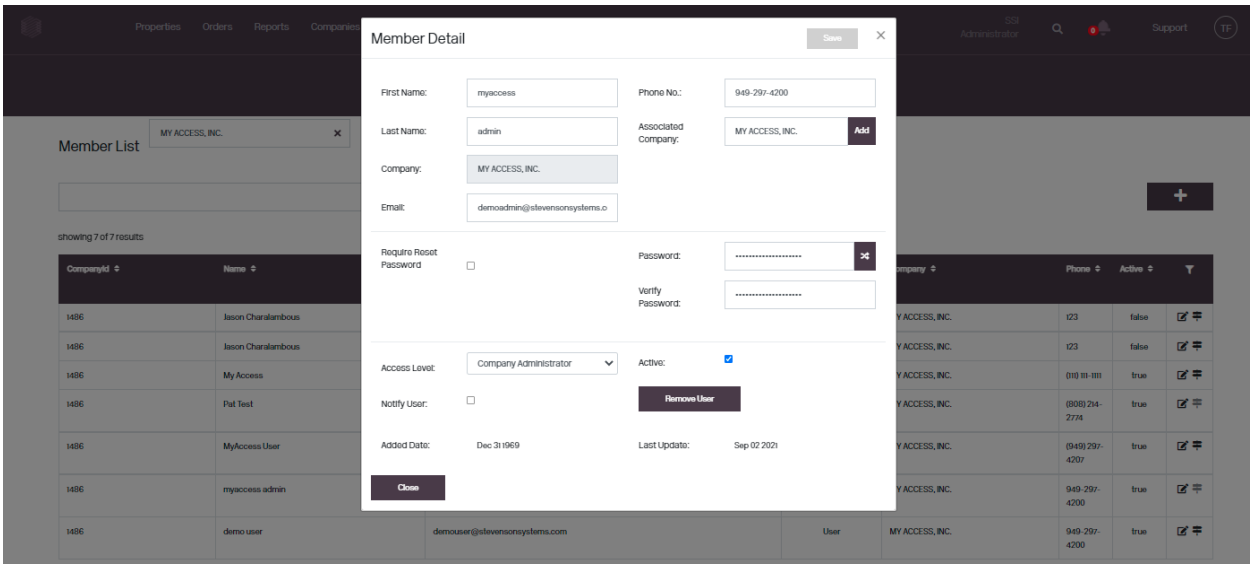
8.1.1.3 *Access Level Descriptions*

Company Admin (company super user): has full access to all buildings assigned to the company. They can view all orders for all buildings and invite additional users.
Company Manager (asset manager with specific buildings assigned): access only to buildings assigned to them. They can view all orders for their assigned buildings and add users to their buildings.
User (usually a property manager or leasing individual): access only to those buildings assigned to them and can only view orders they have placed.
Limited User (usually an outside service like an architect): access to view a listing of properties without additional data, their only link is to the Drawing Vault. Additionally, they can only view the orders they have placed.

8.1.2 Editing Member Detail

Member details includes all information about the member as well as their access level.

Click on the **Edit Member** icon from the **All Members** tab to view Member Detail page.



You can edit a member's company under **Associated Company.**

*Note: **Associated Company** refers to the company that an ADMIN has assigned the user to. **Company** contains the company that the user types in when creating an account and has NO bearing on the user's account.*

Active shows if the user is active (checked) or inactive (unchecked).

Click **Remove** to remove a user email and all user related records from the TruSpace database.

8.1.2.1 Require Reset Password and Notify User

An SSI Admin can require a user to reset their password when logging in. This is an additional functionality to **Forgot Password?** for a user. To do this, have the **Require Reset Password** AND the **Notify User** checkboxes ticked. This will send the member an email with a temporary password. You can also **generate a random password** for the user via the arrow icon button next to password, however you MUST select Notify User for the user to receive an email with the random password.

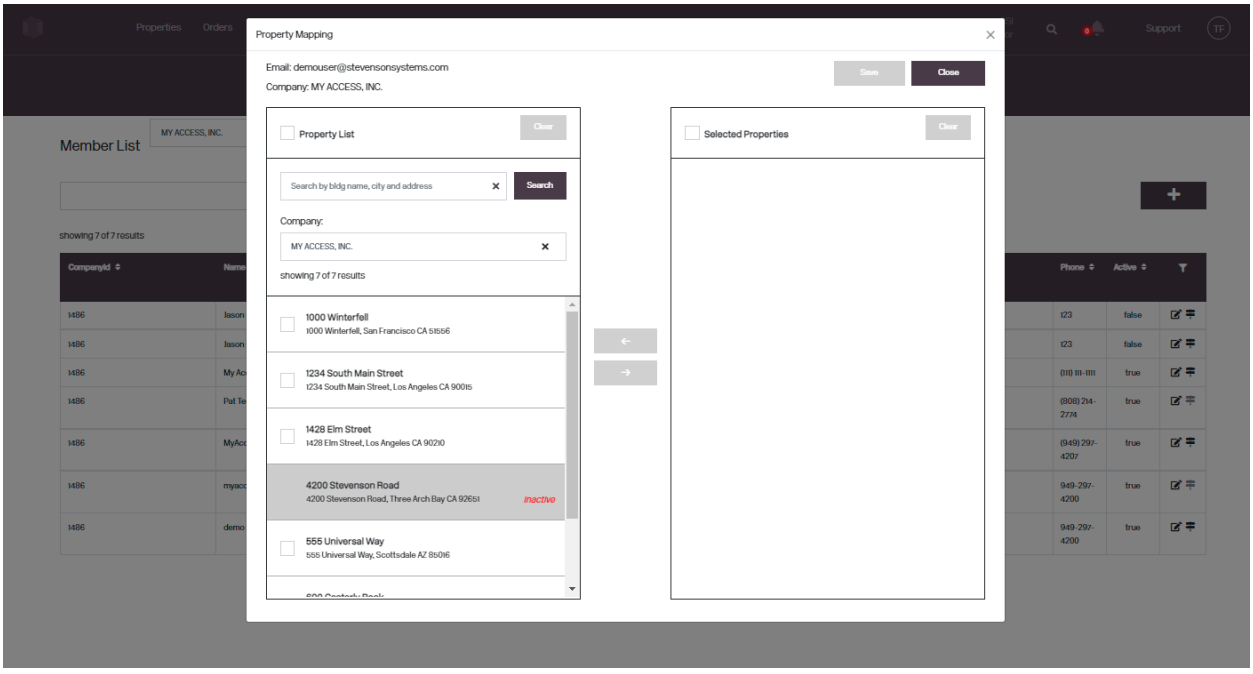
8.1.3 Property Mapping

Click the **Property Mapping** icon from the **All Members** tab to view the **Property Mapping** overlay.

8.1.3.1 Assigning Properties to A Member

The **Property List** section is composed of the properties for company the user is assigned to. The left column has a list of prepopulated buildings determined by the associated company in the users Member Details page.

NOTE: If a building is inactive, it will appear grayed out and labeled as inactive. You must edit the Property Summary for the individual property and mark the building as active to assign it. See Activating a Building for detailed instructions.



To allow a member to view specific properties, select the properties you would like the member to have access to under **Property List**.

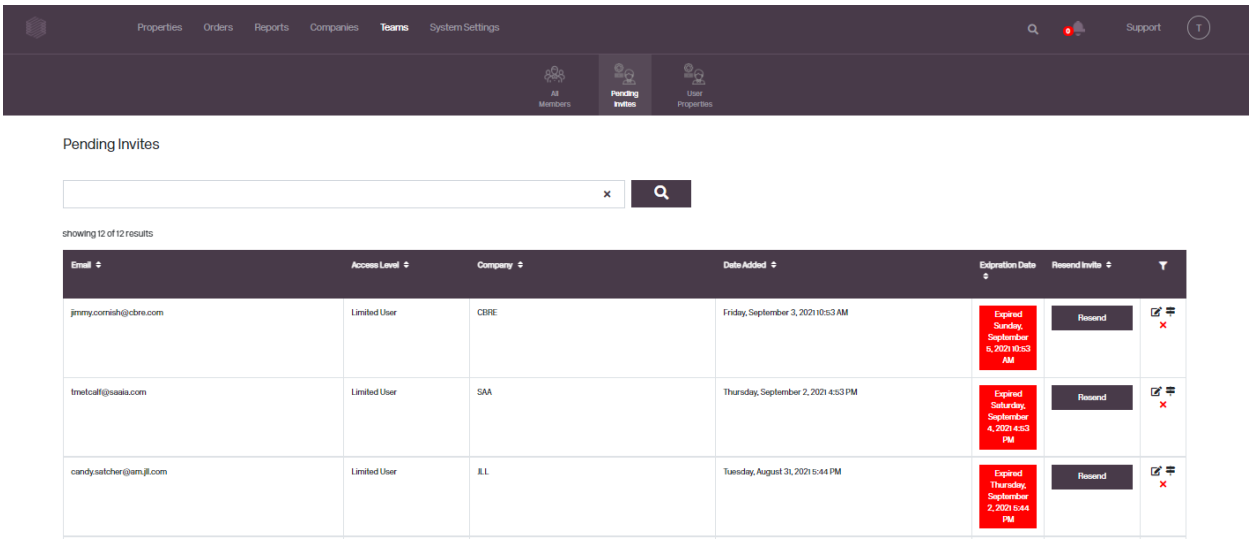
Click the **right arrow** button.

Selected properties will appear under **Selected Properties.**

Click **Save.**

8.2 Pending Invites

A new user that has not yet accepted their invitation or those who have not yet accepted a change in user access level will appear under Pending Users.



All fields in the table can be refined through the **Search** bar.

Invitations expire after 48 hours. **Expiration dates** are noted in the table.

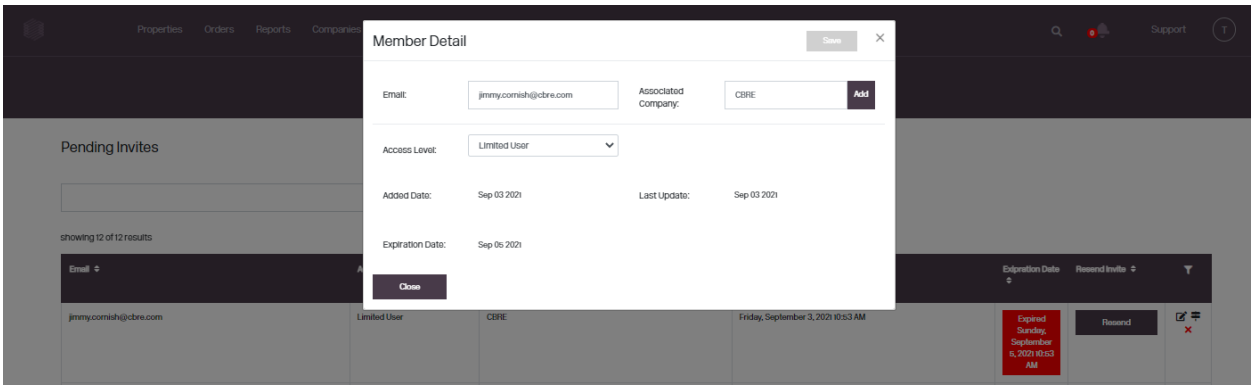
From here, you can edit a member's information/access level or edit properties assigned to a user by clicking on the **edit member details** icon or the **edit properties** icon.

To resend an invitation to a user, click **Resend**.

To **delete** a user, click X.

8.2.1 Pending Invite: Member Details

Editing the Member Details of a Pending User is like that of a member that has accepted their invitation. However, there are only 3 fields that are editable: **Email**, **Associated Company**, **Access Level**.

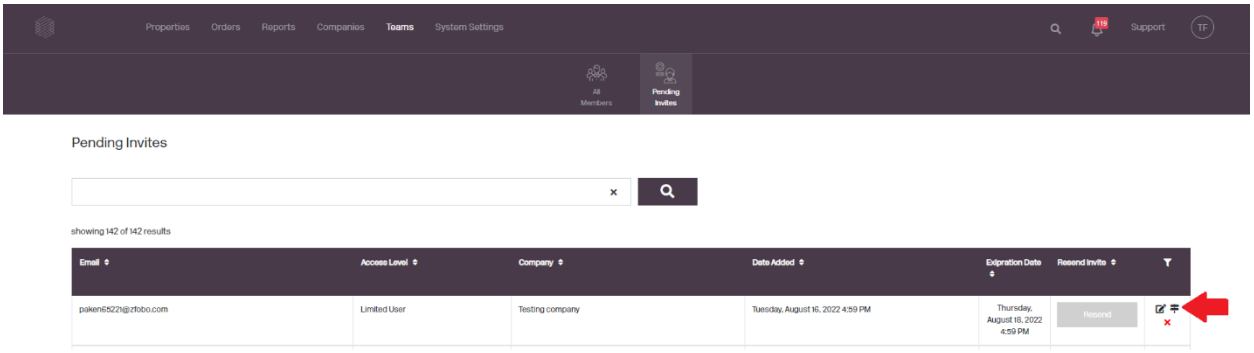


Any changes made to the member details will automatically send a new invitation to the email provided.

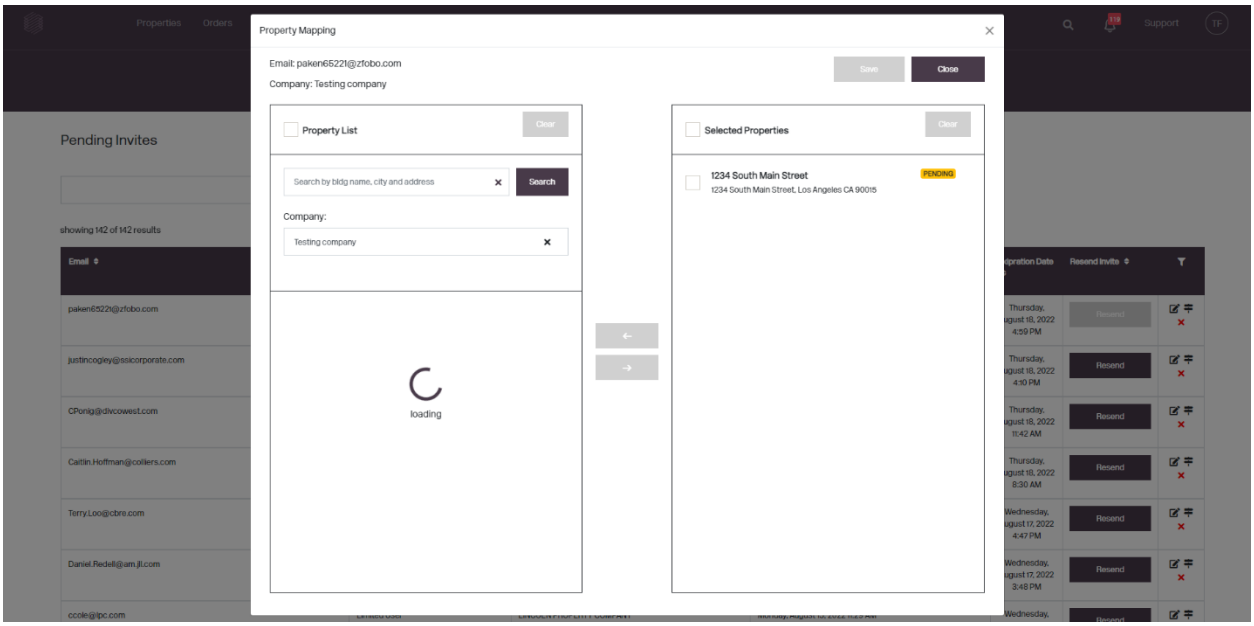
8.2.2 Pending Invite: Property Mapping

Editing the properties assigned to a Pending User is like that of a member that has accepted their invitation.

Click on the **Property Mapping** icon.



The property mapping is defaulted to filter by the company assigned to the user.



You can add additional buildings from this company or exit out of the company filter and search for additional buildings.