ePortfolio Decision

User Guide

Documentation Group

Tampa, Florida
<table>
<thead>
<tr>
<th>Document Description</th>
<th>ePortfolio Decision Version 7.5.4 User Guide March 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software Description</td>
<td>ePortfolio Decision Version 7.5.4 March 2014</td>
</tr>
<tr>
<td>Published</td>
<td>AMSI makes no warranty of any kind with respect to the completeness or accuracy of this document. Changes and/or improvements in the products and/or programs described in this document may be made at any time and without notice, and may impact this document’s contents.</td>
</tr>
<tr>
<td>Copyright</td>
<td>Copyright © 2014 Infor. All rights reserved. The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other trademarks listed herein are the property of their respective owners. <a href="http://www.infor.com">www.infor.com</a>. This document may not be reproduced in whole or in part or used for tendering or manufacturing purposes except under an agreement or with the written consent of the copyright holder and then only under the condition that this notice is included in any such reproduction. No information regarding the contents or subject matter of this document or any part thereof arising directly or indirectly thereof shall be given orally or in writing or communicated in any manner whatsoever to any third party without the prior written consent of the copyright holder.</td>
</tr>
</tbody>
</table>
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>ePortfolio Decision Interface</td>
<td>2</td>
</tr>
<tr>
<td>Property Filters</td>
<td>3</td>
</tr>
<tr>
<td>Setting up Report Codes in eSite</td>
<td>4</td>
</tr>
<tr>
<td>Using Alternate Report Codes</td>
<td>5</td>
</tr>
<tr>
<td>Setting Up User Property Access</td>
<td>6</td>
</tr>
<tr>
<td>Defining Filters in ePortfolio Decision</td>
<td>7</td>
</tr>
<tr>
<td>Filtering and Map Interaction</td>
<td>8</td>
</tr>
<tr>
<td>The Property Grid</td>
<td>10</td>
</tr>
<tr>
<td>Using Additional Filters</td>
<td>11</td>
</tr>
<tr>
<td>Using the Property Filter</td>
<td>12</td>
</tr>
<tr>
<td>Understanding the Property Grid</td>
<td>13</td>
</tr>
<tr>
<td>Key Performance Indicators</td>
<td>15</td>
</tr>
<tr>
<td>Configuring KPI Gauges</td>
<td>15</td>
</tr>
<tr>
<td>Charts and Graphs</td>
<td>16</td>
</tr>
<tr>
<td>Zoom feature on Charts and Graphs</td>
<td>17</td>
</tr>
<tr>
<td>Add and Remove Charts</td>
<td>29</td>
</tr>
<tr>
<td>Print Preview and Print Charts</td>
<td>29</td>
</tr>
<tr>
<td>Bookshelf</td>
<td>30</td>
</tr>
<tr>
<td>User Setup and File Upload</td>
<td>30</td>
</tr>
<tr>
<td>Folder Setup</td>
<td>32</td>
</tr>
</tbody>
</table>
ePortfolio Decision is AMSI’s premier Business Intelligence (BI) solution.

ePortfolio Decision is a state of the art graphical Internet tool that provides high-level property management information at a glance for the corporate decision maker.

ePortfolio Decision summarizes data from the AMSI Evolution suite of products based on user-defined criteria such as geographic location, property type, or management team.

ePortfolio Decision is designed to give a consistent look and feel without regard to type of browser or screen resolution.
ePortfolio Decision Interface

The AMSI ePortfolio Decision user interface displays executive level AMSI Evolution Suite information on one simple, easy-to-use screen. Information is displayed on colorful maps, grids, and charts, allowing you to quickly examine a wide range of performance data at once. Using filters, you can check on a single property, or review the progress of an entire region.

Figure 1: The main interface is divided into four main parts: Property Filters, Property Grid, Key Performance Indicators (KPI), and Charts and Graphs.
Property Filters

Filters in ePortfolio Decision provide you with a high degree of flexibility when viewing property management data. You can filter by date, geographic area, and user-defined fields. Pop-up forms offer additional details and options that further help you see and manage every aspect of your company.

Figure 2: The Property Filters area is divided into several parts:

A. **Gear Icon** opens the Define Filters pop-up, where you can select filters based on eSite Report Codes.
   - **Wrench Icon** opens the Configure KPI Gauges: Ranges Settings pop-up, where you can set KPI Gauge range settings.
   - **Folder Icon** opens the Upload Files for User pop-up, where you can select a user to see uploaded files and select the folder where the file is saved.
   - **Bookshelf Icon** opens the Bookshelf pop-up.
B. **Dates**: Data for graphs and charts is based on the Current Date (uses eSite data), or the Historical Date (uses Extract data).
C. **Map Filters**: This drop-down sorts the map by one of three filters, showing states that meet the filter’s criteria.
D. **Filters 1-3**: These user-defined filters are used to select properties, affecting what is shown on the map and in the Selected Portfolio Overview grid.
E. **Apply Property Filter** opens the Apply Property Filter that further narrows the property selection.
   - **Export to Excel** allows you to export the selected properties and information to Microsoft Excel.
   - **Apply Additional Filters** opens the Additional Filters pop-up, where you can select filters based on eSite Report Codes.
F. **Property Grid** shows all properties that match the Filters. For more information see The Property Grid section on page 10.
Setting up Report Codes in eSite

eSite Report Codes are used as Filters in ePortfolio Decision. These Filters enable you to retrieve and show data for a set of properties that share common information. For this functionality to be enabled in ePortfolio Decision, Report Codes must first be set up in eSite. Report Codes are used in other areas of eSite, so they may be set up already in your system. The next few sections briefly discuss the process of setting up Report Codes. Refer to the eSite Help for a more detailed explanation of this process.

Note:

Report Codes in eSite are Global and restricted by permissions. Users with permissions (Administrators or managers) define the filter settings once. They can be changed; however Filters/Report Codes are not intended to be accessible to end users to toggle settings for the filters.

For ePortfolio Decision to work correctly, at least three Report Codes must be defined in eSite.

Follow these steps to set up Report Codes, specify valid values for Report Codes, and assign report code values to each property.

To set up Report Codes:

1. In eSite, navigate to Setup—Global—Report Codes.

2. Click Add Report Code, or click a Report Code in the grid, to open the Add or Edit Report Codes page.

3. Specify values for the Report Code. Add as many as are needed. In the example above, possible values for a Report Code called Region are Central, Eastern, Northeast, Western, etc. Click Save when you are finished adding values.
4. Navigate to **Setup—Property—Properties** to access the Properties grid in eSite.

![Properties Grid](image1)

**Figure 5:** Report Codes are accessed from the Properties Grid.

5. Click the **Report Codes** link for a property to open the **Property Report Codes** page.

6. Select a **Report Code** from the drop-down on the left and then select a corresponding **Value** from the drop-down to the right. This assigns that particular attribute to that property. There is no limit to the number of Report Codes and Values each property can be assigned; however, only five Filters can be active in ePortfolio Decision at one time.

![Property Report Codes](image2)

**Figure 6:** Here you see a number of Report Codes and their Values. Each property can have as many Report Codes as are needed. All codes and values assigned in eSite can be used as Filters in ePortfolio Decision; however, only five Filters can be active at any one time.

7. Click **Save** to save changes.

8. Repeat steps 5 – 7 for each property in eSite.

### Using Alternate Report Codes

A system-supplied **Alternate Property ID** Report Code, __@PropID__, is available to be added in eSite and then associated to various properties. Use of the Alternate Property ID Report Code provides the ability to rename a property *from* the eSite Property ID *to* something recognizable to ePortfolio Decision users who would not otherwise recognize a property by the Property ID used in eSite. If no alternate ID is specified, the system uses the eSite Property ID in ePortfolio Decision.

To specify an alternate Property ID in eSite:

1. In eSite, navigate to **Setup—Global—Report Codes**.
2. Click **Add Report Code** to open the Add or Edit Report Codes page.
3. Type the system-supplied Alternate Report Code: __@PropID__ (two underlines at the beginning and one at the end).
4. Type a description, such as “Alternate Report Code.”
5. Type Values that you intend to assign to properties. The first 10 characters entered into the Value field are used by the system. Enter as many Values as desired. Each value is the “label” that is intended to be visible throughout ePortfolio Decision charts and grids instead of the eSite Property ID that you will link the Value to in the next steps.
7. Click the Report Codes link for a property to open the Property Report Codes page.
8. Select an Alternate Property ID from the drop-down on the left and then select a corresponding Value from the drop-down to the right. This assigns that particular Alternate Property ID value to appear in ePortfolio Decision for that Property.
9. In ePortfolio Decision, note that for any eSite Property ID linked in this way, the Property ID for a property matches the value assigned in eSite for the Alternate Property ID Report Code.

**Setting Up User Property Access**

Existing Users

Existing user property access rights from within the eSite module of the AMSI Evolution Suite will flow into ePortfolio Decision without any additional setup needed. ePortfolio Decision looks at property access rights as defined within the eSite module.
Defining Filters in ePortfolio Decision

Filters are the property report codes set up in eSite (see the section Setting up Report Codes in eSite). They are used to sort properties based on their values. For instance, if you were to select a Regional filter called “Central”, every property that had the value Central as the Regional report code would be listed. You can choose up to five filters to work with at any one time. At any time, you can change a filter to any Report Code set up in eSite.

The Gear icon opens the ePortfolio Decision (Define Filters) pop-up, which is where you set your filters.

![Gear icon]

**Note**

This icon is securable by permission. Administrator-level users define the filter settings once; Filters/Report Codes are not intended as end-user level settings for toggling filters.

To Define Filters:

1. Click the Gear Icon to open the Decision (Define Filters) pop-up.

Define up to five Filters by selecting the appropriate eSite Report Codes from the filter drop-downs. Filter 1, Filter 2, and Filter 3 may be used to filter the Map (see the next section, Filtering and Map Interaction). Filters 4 and 5 are additional filters that may be applied to the grid, charts, graphs, and gauges (described in Using Additional Filters in The Property Grid section.)

2. After setting your desired filters (a minimum of three are recommended), click **Apply Changes** and close the pop-up.

You can change the Filter definitions at any time. The current Filter definitions are saved in eSite Global Policies (G25.1 – G25.5). The current Filter setting values for each Login User ID are also saved in the eSite database.
Filtering and Map Interaction

The map gives you a geographical representation of where your properties are located. Follow these four steps to filter properties using the ePortfolio Decision Map:

**Step 1:**

When you first view ePortfolio Decision, every Filter is set to **All**, which means:

- There is no filtering action.
- All Properties that you have rights to are selected.
- The Map is a solid color.

By default, the first filter set up in Define Filters (click the Gear icon in the top left corner to access) is the starting filter shown in the Map drop-down.

The **Map** drop-down allows you to choose one of the first three Filters as the starting point in a series of drill-downs. In this example, the drill-down begins with the custom filter **Region**.

**Step 2:**

Any state on the Map may have eSite Properties with addresses in that state. If this is the case, hovering the cursor over that state will have several effects:

- The state is displayed in a brighter color than other states.
- The value of the first drill-down is displayed in green under the Map filters.

The Figure shows that properties in the state of Texas belong to the **Central** Region. **Central** is shown in green when hovering the mouse over Texas. It is possible for more than one value to be valid; multiple values are comma-separated.

Any other states that have properties assigned to the “Central” Region are also shown in a brighter color; in this example, the state of Illinois is highlighted.
Step 3:
If you double-click on the state, several things happen (see Figure for illustration):

- The states previously highlighted are locked into their colors.
- The word “Central” appears in the Map filter area after “All Region” to indicate that you drilled down into the Central Region, and “Central” is also selected in the drop-down list for Region below the Map.
- Filtering is applied to all Properties, i.e., only Properties assigned to the Central Region display in the Property Grid, and only data from those Properties is used in the graphics.

Step 4:
In the Figure, double-clicking again on Texas drills down to the state level:

- Only Texas is highlighted. The State Code “TX” appears in the Map filter area after “Central.”
- Only Properties with a Texas address appear in the grid and influence the graphics.
The Property Grid

The Property Grid is a representation of all Properties that meet the filtered criteria. It contains a considerable amount of information on Occupancy, Delinquency, and Collections.

The Property Grid has the following characteristics:

- Filters 1 through 3 and the Property State Code are always the four columns after Property.
- A horizontal scroll-bar with the first two grid columns frozen in place for quick reference to the Property ID and Name.
- A Properties Filter that allows you to select specific properties to view (see Using the Property Filter section).
- An Export to Excel icon that allows you to download the data to Excel.
- An Additional Filters icon where Filters 4 and 5 are located (see Using Additional Filters section).
- A grid that normally shows ten rows at a time, but may show fewer depending on screen resolution.
- Paging controls to accommodate large numbers of Properties.

![Property Grid Image]

Figure 12: A breakdown of the Property Grid
Using Additional Filters

ePortfolio Decision currently allows you to define and use up to five filters at one time. A minimum of three filters must be set up for the filtering process to work correctly. All of these filters are applied against the Property Grid, the KPI Gauges, and the Charts and Graphs. The first three filters (Filter 1, Filter 2, and Filter 3) are also used to highlight states on the map showing the locations of the filtered properties.

Filters 4 and 5 are called Additional Filters. To keep the Decision screen uncluttered, the Additional Filter values are set using a pop-up screen accessed by clicking the Gear icon.

To Set Additional Filters:
   a. Click the Gear icon. The ePortfolio Decision (Additional Filters) pop-up opens.
   b. Choose the values for the Additional Filters.
   c. Click Apply to immediately refresh the graphics and close the pop-up.

To Turn off Filtering Action:
   a. Click the Gear icon. The ePortfolio Decision (Additional Filters) pop-up opens.
   b. Select All from the drop-down list for that filter.
   c. Click Apply to immediately refresh the graphics and close the pop-up.

Note

You do not have to define all five filters. Filters that are not defined simply have no effect.
Using the Property Filter

The Property Filter lets you select specific properties that have already been filtered for viewing. You can select a single property or multiple properties without changing Filters 1 through 5. Data for the selected properties will be shown on the Property Grid, KPI gauges, charts and graphs.

To set the Property Filter

1. Click the Property Filter icon located above the property grid to open the ePortfolio Decision (Apply Property Filter) pop-up.
2. Select either a single property to view, or multiple properties. To select multiple properties:
   a. Press Ctrl and the mouse button while you select the properties.
   b. To select several adjacent properties in the list, select the first property then press Shift and the mouse button on the last property to select the first through last properties.
3. Click Apply and then close the pop-up.

Figure 15: Use the Properties Filter to further refine the number of properties shown.
Understanding the Property Grid

The following shows where the data displayed in the ePortfolio Decision Property Grid is pulled from in eSite.

<table>
<thead>
<tr>
<th>ePortfolio Decision</th>
<th>eSite</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Property ID</td>
</tr>
<tr>
<td>Name</td>
<td>Property Name</td>
</tr>
<tr>
<td>Filter 1</td>
<td>Property Setup – Report Code</td>
</tr>
<tr>
<td>Filter 2</td>
<td>Property Setup – Report Code</td>
</tr>
<tr>
<td>Filter 3</td>
<td>Property Setup – Report Code</td>
</tr>
<tr>
<td>State</td>
<td>Property Setup – Address: State</td>
</tr>
</tbody>
</table>

The ePortfolio Decision Property Grid values should match the eSite Property Status Report.

<table>
<thead>
<tr>
<th>ePortfolio Decision</th>
<th>Property Status Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Units</td>
<td>Occupancy: Total Unit</td>
</tr>
<tr>
<td>Occupied</td>
<td>Occupancy: Total Occupied*</td>
</tr>
<tr>
<td>Occupancy</td>
<td>Occupancy: Total Occupied Percent*</td>
</tr>
<tr>
<td>Vacant Available</td>
<td>Occupancy: calculation (Total Vacant – Vacant Not Avail)</td>
</tr>
<tr>
<td>Vacant Leased</td>
<td>Occupancy: Vacant Not Avail</td>
</tr>
<tr>
<td>Total Vacant</td>
<td>Occupancy: Total Vacant</td>
</tr>
<tr>
<td>Notice Available</td>
<td>Occupancy: calculation (Total On Notice – On Notice Not Avail)</td>
</tr>
<tr>
<td>Notice Leased</td>
<td>Occupancy: On Notice Not Avail</td>
</tr>
<tr>
<td>Total Notice</td>
<td>Occupancy: Total On Notice</td>
</tr>
</tbody>
</table>

With the ePortfolio Decision Current Date = eSite Log-In Date, the Total Occupied field will match

With the ePortfolio Decision Current Date = the first of the property’s month, the Occupied mm/dd/yy  field will match

*Note: the Property Status report may have different values based on Property Policy P8.5 (unit is occupied on move-out date).
The following table clarifies the ePortfolio Decision terms in the left column with the definitions from eSite in the right column.

<table>
<thead>
<tr>
<th>Term</th>
<th>eSite Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Billed</td>
<td>Total charges to all income codes in the current accounting period.</td>
</tr>
<tr>
<td>Rent Billed</td>
<td>Charges to income codes of type Rent in the current accounting period.</td>
</tr>
<tr>
<td>Total Paid</td>
<td>Total payment codes in the current accounting period.</td>
</tr>
<tr>
<td>Rent Paid</td>
<td>Payments to rent income code in the current accounting period.</td>
</tr>
<tr>
<td>Total Delinquency</td>
<td>Current Total Delinquency</td>
</tr>
<tr>
<td>Rent Delinquency</td>
<td>Current Delinquency for income codes of type Rent</td>
</tr>
<tr>
<td>Misc Income</td>
<td>Miscellaneous income in the current accounting period.</td>
</tr>
<tr>
<td>Security Deposit</td>
<td>Security Deposits collected in the current accounting period.</td>
</tr>
<tr>
<td>Other Deposit</td>
<td>Other deposits collected in the current accounting period</td>
</tr>
</tbody>
</table>

The ePortfolio Decision Property Grid values should match the eSite Monthly Income Summary Report.

<table>
<thead>
<tr>
<th>ePortfolio Decision</th>
<th>Monthly Income Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Billed</td>
<td>Property Total: Adjustments</td>
</tr>
<tr>
<td>Rent Billed</td>
<td>Rent: Adjustments*</td>
</tr>
<tr>
<td>Total Paid</td>
<td>Property Total: (\text{calculation}) (Bank Deposits total – Vend/Misc - Returns)</td>
</tr>
<tr>
<td>Rent Paid</td>
<td>Rent: (\text{calculation}) (Bank Deposits *Rent – <em>Rent Returns)</em></td>
</tr>
<tr>
<td>Misc Income</td>
<td>Vend/Misc: Bank Deposits</td>
</tr>
<tr>
<td>Sec Deposits</td>
<td>Security Deposits: Bank Deposits</td>
</tr>
<tr>
<td>Other Deposits</td>
<td>Other Deposit: Bank Deposits</td>
</tr>
</tbody>
</table>

*  Rent = the sum of all income codes with a Rent income code type

The ePortfolio Decision Property Grid values should match the eSite Delinquency Report.

<table>
<thead>
<tr>
<th>ePortfolio Decision</th>
<th>Delinquency Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Delinquency</td>
<td>Aged Delinquency Summary: Total</td>
</tr>
<tr>
<td>Rent Delinquency</td>
<td>Aged Delinquency Summary: Rent</td>
</tr>
</tbody>
</table>
Key Performance Indicators

The Key Performance Indicator (KPI) Gauges show four important Property Management ratios as percentages in a radial gauge graphical format. The four indicators are Current Occupancy, Historical Occupancy, Rent Collected, and Unit Availability.

Configuring KPI Gauges

The segments of each gauge can be given different colors by the administrator. For example, red may indicate an undesirable condition, orange may indicate a warning condition, and green may indicate a good condition of the filtered properties. Range and color settings make it easier to see the status of the key indicators quickly, but are not required. You may define up to four color ranges on each gauge.

Note

Range and color settings are global, apply to all users, and are maintained in the eSite database. Administrator-level users will define the ranges; they are not intended to be changed by the user.

The Configure KPI pop-up appears when you click on the Wrench icon to the top left corner of the main screen.

To Define Color Ranges for each Gauge

a. Enter a Range Starts From value, a Range Ends At value, and then select a color from the drop-down list to apply to that range. Range values must be whole numbers between 1 and 100 and ranges may not overlap.

b. After defining the Range settings, click Apply Changes to refresh the graphics.

c. Click the Cycle Gauges icon to cycle through the four different gauges.
Charts and Graphs

ePortfolio Decision can show up to six preview-sized charts and graphs at a time. Charts show data for properties that match your property filter selections. This data is calculated based on the **Current Date** using eSite, eService, or eFinancials data and/or the **Historical Date** using Extract data. The title of the chart or graph indicates the type of data represented.

The charts and graphs available for selection are:

**eSite**
- Billed/Paid Analysis
- Closing Ratio
- Current Delinquency
- Delinquency (Current Only)
- Current Occupancy Percentages
- Delinquency by Prop (All)
- Delinquency by Prop (Current Only)
- Occupancy Forecast
- Historical Delinquency
- Historical Delinquency Over Time
- Historical Occupancy Percentages
- Vacant Unit by Bedrooms/Unit Types
- Marketing Source Analysis
- Lease Expirations

**eService**
- Work Order Summary

**eFinancials**
- Actual/Budget Review

Future enhancements may include additional charts and graphs and the ability to display a particular chart in various graphical formats.

The next several sections give a detailed description of each chart and graph.
**Zoom feature on Charts and Graphs**

The Zoom icon allows you to see an enlarged version of the chart. The expanded chart provides additional detail defined by a legend.

Figure 18: Click the Zoom icon to access a detailed version of each chart.

The legend defines detailed information.

Figure 18: The expanded chart gives detailed information as well as a legend.
Current Occupancy Percentages

Shows the current capacity of each property based on the Current date selected.

Historical Occupancy Percentages

Shows how full each property was, with 100% being maximum capacity, based on the Historical date selected.
Occupancy Forecast

Shows the number of expected move-ins and move-outs for the given dates. Double-clicking the larger chart opens the Occupancy Forecast Details screen that shows additional details about move-ins and move-outs.

Double-click anywhere on the chart to open the Occupancy Forecast Resident Details “drill-down” screen. Click the plus icon to show detailed information for each filtered property.

**Note:** This feature is not available on the iPad.

### Occupancy Forecast Resident Details:

<table>
<thead>
<tr>
<th>Property</th>
<th>Bldg ID</th>
<th>Unit ID</th>
<th>Unit Type</th>
<th>Sub Type</th>
<th>First Name</th>
<th>Last Name</th>
<th>Expected Move In</th>
<th>Move In</th>
<th>Expect Move Out</th>
<th>Move Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property: 01-AMSI - Parks at Niagara Falls [Total Units: 260, Current Occupied: 292] (Count=29)</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Property: 01-AMSI - Bear Hunt [Total Units: 576, Current Occupied: 538] (Count=44)</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Property: 03-AMSI - Villages at Sydney [Total Units: 208, Current Occupied: 196] (Count=22)</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Property: 102NFOR - Inforum Apartments [Total Units: 249, Current Occupied: 229] (Count=58)</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Property: 302NFOR - Infor Reserves [Total Units: 306, Current Occupied: 285] (Count=29)</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Property: AMSE1 - Pasta Hilton [Total Units: 280, Current Occupied: 197] (Count=40)</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Property: INFOR1 - Grand Canyon Villas [Total Units: 326, Current Occupied: 195] (Count=47)</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td></td>
</tr>
</tbody>
</table>
**Current Delinquency**

Shows the percentage of delinquent payments for each property based on the **Current** date selected.

**Historical Delinquency**

Shows the percentage of delinquent payments for each property based on the **Historical** date selected.
Delinquency (Current Only)

Shows the percentage of delinquent payments for Current residents. This includes On Notice and Transfer residents.

Delinquency by Prop (All)

Shows the delinquency by property. This data range is based on the selected Current date.

Four filters: Restrict Income Code, Restrict Income Code Type, Exclude Income Code, and Exclude Income Code Type can be used to further refine graph data.

Double-click anywhere on the chart to open the Delinquent Resident Details “drill-down” screen. Click the plus icon to show detailed information for each filtered property.

Note: This feature is not available on the iPad.

<table>
<thead>
<tr>
<th>Bldg ID</th>
<th>Unit ID</th>
<th>Unit Type</th>
<th>First Name</th>
<th>Last Name</th>
<th>Status</th>
<th>Code</th>
<th>Type</th>
<th>Invoice No</th>
<th>Due Date</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Property ID: 01-AMSI ($37,821.29)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Property ID: 02-AMSI ($50,541.14)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Property ID: 03-AMSI ($22,054.99)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Delinquency by Prop (Current Only)

Shows delinquency by property for Current, On-Notice, and Transfer residents. This data range is based on the Current date.

Four filters: Restrict Income Code, Restrict Income Code Type, Exclude Income Code, and Exclude Income Code Type can be used to further refine graph data.

Double-click anywhere on the chart to open the Delinquent Resident (Current Residents Only) Details “drill-down” screen. Click the plus icon to show detailed information for each filtered property.

Note: This feature is not available on the iPad.
**Historical Delinquency Over Time**

Shows the historical delinquency during a certain period. The **Historical** date and the **Current** date determine the period and number of data points shown on the graph.

**Closing Ratio**

Shows Leasing Agent performed within the last seven days of the Current date selected.

Two statistics are shown for each Leasing Agents; the number of potential closes (in purple), and the ratio that the agent actually closed at (in green). Since this chart tracks the last seven days, the Closing Ratio may include closes that occurred in this time period, but were shown prior to this.
Lease Expirations

Shows the number of leases expiring from the current date through the next twelve months.

You can filter by restricting the data to specific properties or excluding approved renewals.

Double-click anywhere on the chart to open the Lease Expirations Details “drill-down” screen. Click the plus icon to show detailed information for each filtered property.

Note: This feature is not available on the iPad.
Vacant Units by Bedrooms/Unit Types

Shows the number of vacant units available, arranged by number of bedrooms.

Select Group By Unit Types to filter by unit type or restrict the information to a specific property by choosing a property from the Restrict to Property drop-down box.

- 1 bedroom
- 2 bedrooms
- 3 bedrooms

Double-click anywhere on the chart to open the Vacant Units by Bedrooms/Unit Types “drill-down” screen. Click the plus icon to show detailed information for each filtered property.

Note: This feature is not available on the iPad.
Marketing Source Analysis

Shows up to ten source codes based on the total traffic count. Each bar stack shows either traffic or net leases for a particular property.

Enter a date in the From Date filter to include data from that date to the current date.

Restrict to Property and Restrict to Code allow you to restrict data to specific properties and source codes.

Double-click anywhere on the chart to open the Marketing Source Analysis “drill-down” screen. Click the plus icon to show detailed information for each filtered property.

Note: This feature is not available on the iPad.
**Billed/Paid Analysis**

Shows the following sets of data for each selected property:
- Gross Market Rent Potential
- Current Due Collected
- Past Due Collected
- Prepaid Collected
- Current Rent Delinquency

---

**Work Orders Summary**

The *Work Order Summary* chart shows the open Work Orders for the selected Portfolio. The zoomed view allows further filtering based on Submitted Date and Priority Code.

Enter a date into the **Submitted since** field to include data from that date to the current date.

Select a priority to view only work orders with that priority: Emergency, High, Medium or Low.

Double-click anywhere on the chart to open the *Work Order Details* “drill-down” screen. Click the plus icon to show detailed information for each filtered property.

**Note:** This feature is not available on the iPad.
Actual/Budget Review

The Actual/Budget Review chart shows Budget and Actual account data for accounts of the type Expense for the selected Portfolio.

The zoomed view allows further filtering by Month To Date, Fiscal Year, Period and allows you to restrict by Property or Expense Code.

The system relies on the Default Entity (Standard Setup) or Default Company (Simplified Setup) as the setup for the property within eFinancials.

Double-click anywhere on the chart to open the Actual/Budget Review Details “drill-down” screen. Click the plus icon to show detailed information for each filtered property.

Note: This feature is not available on the iPad.

| Property: BearRun (Bayou Apartments) (Budget: $760,000.00, All Actual: $660,314.58) |
| Property: INFOR1 (Geac Communities) (Budget: $12,000.00, All Actual: $406.00) |
Add and Remove Charts

There are a number of available charts that show various details about each property, as detailed in the previous sections. Only six charts may be shown at one time. To show a different chart, click the Trash icon for any chart that you want to remove. Then click Select new chart..., shown in the next steps:

Step 1  Click a chart’s Trash icon to remove that chart from the screen.
Step 2  The Select new chart... button appears. Click to add a new chart.
Step 3  The ePortfolio Decision (Select Chart) pop-up appears. Select a chart to view, and then click Apply and Close.

Print Preview and Print Charts

The Print Preview icon at the top left allows you to print a preview page that shows all the KPI Gauges and the selected charts. From the Preview page you can view a detailed version of each chart.

Note: Print Preview is not available on the iPad.

You can also print that page to the printer by clicking the Print to Printer icon.

Figure 20: The Print Preview pop-up shows detailed information for all charts.
**Bookshelf**

Bookshelf is a report delivery system that offers a simple, easy-to-use interface for sending and receiving reports. You can receive and review reports sent by other ePortfolio Decision users, schedule automated ePortfolio Reporting reports to be sent to your Bookshelf using ePortfolio Alerts, upload your own reports that can be accessed on alternate computers/devices, or upload files to other ePortfolio Decision users for review.

A simple drag & drop file upload system lets you easily add a file (of a variety of types) to a user’s Bookshelf. This process is supported on Internet Explorer 9, Mozilla Firefox and Google Chrome browsers. Folders are displayed as multicolored books with the folder name listed on the spine. Each folder contains a list of uploaded files that can be viewed on most web browsers and devices, including the iPad.

Bookshelf is accessed by clicking or tapping the Bookshelf icon in the top-left corner of the screen. The following sections describe how to set up and use Bookshelf.

**User Setup and File Upload**

A user’s Bookshelf is set up during the file upload process. Only users with the permission to upload files can see the upload icon. This permission is set in the System module (Security—Roles—Decision—Upload Files).

The file types that may be uploaded are set in eSite (Setup—Global—Document Types). The following file types can be uploaded to Bookshelf:

- .pdf (Portable Document File)
- .docx (Word 2007-2010 Document)
- .xls (Excel 2000-2003 File)
- .xlsx (Excel 2007-2010 File)
- .txt (Text File)
To set up user folders and upload files, follow these steps:

1. **Step 1**
   Click the Upload icon located in the top left corner of the main screen.

2. **Step 2**
   Select the user to whom you are sending the file from the User box.

3. **Step 3**
   Select the user’s folder where the file will be saved for their viewing from the Folder box. You can also create a new folder by clicking <New>.

4. **Step 4**
   From your computer, drag the file that you are uploading from your computer directly onto the tray icon. When the file is successfully uploaded, you will receive an Upload Complete message. You can either close the window or upload another file.

   **Note:** The Drag & Drop feature can only be used with Google Chrome or Mozilla Firefox web browsers. It is not available on the iPad.

The files are listed alphabetically in each folder:
**Folder Setup**

We recommend that you organize your Bookshelf so that it is easy for users to upload files to the correct folders. A good practice is to add several folders during the initial setup based on your reporting methods. For example, if you receive quarterly reports from several people, you could create a folder for each quarter. Everyone uploading a file would then use a file naming convention to identify who the file was from and what type of information it contains.

New Files

New files that have recently been uploaded will have *New* next to them.

Deleting Files

To delete a file, click the Trash icon next to the file name.