

Role: All users

Task A: [Explore](#)

Task B: [Space Manager](#)

Task C: [Asset Manager](#)

Task D: Hazards & Risks (not yet in use)

Task E: [Legal Documents](#)

Task A: Explore

A1 Navigate to *Portfolio > Explore*.

A2 Select to search by Location, Element or both.

A3 If searching by location, select the building cluster required:

1. Operational
2. Vacant
3. Residential – Operational
4. Residential Properties
5. Non-Operational
6. Ground maintenance
7. Removed

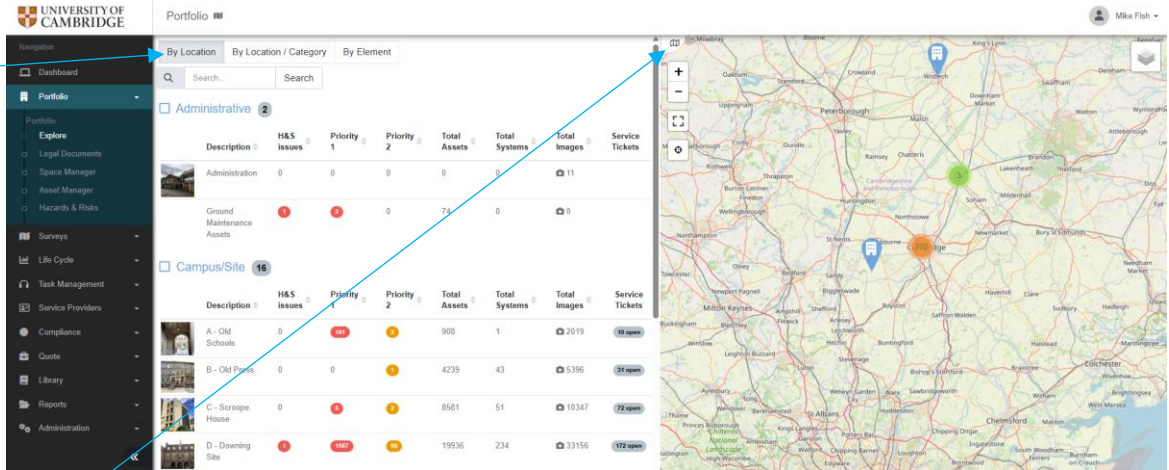
A4 Find a location or asset by:


- a. clicking on the list to go down a level.
- b. clicking on map pins.
- c. using the search box.

Return to higher levels by clicking in the breadcrumb trail that develops along the top of the page.

A5 Click to Hide/Show the map.

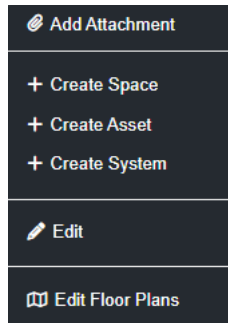
A6 Location info can also be found by navigating the map, clicking on a building pin, then *Full details*.





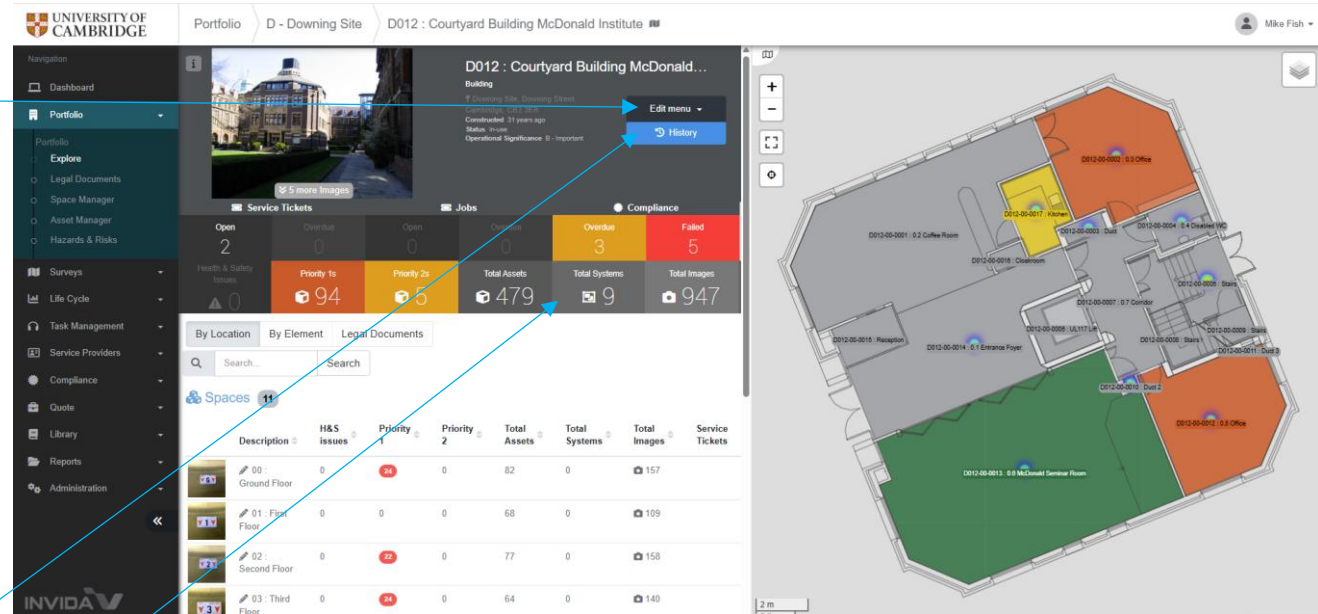
When a desired location or asset has been found ...

A7 Depending on your role and permissions, you may be able to click here to view or edit location/asset info:



A8 Click to see a Job history relating to the location/asset.

A9 Click tiles to be taken to relevant *Ticket*, *Job* or *Compliance* pages.



Task B: Space Manager

B1

Navigate to *Portfolio* > *Space Manager*.

B2

Find a location by:

a. searching by keyword.

b. using a filter.

c. searching in a column header.

B3

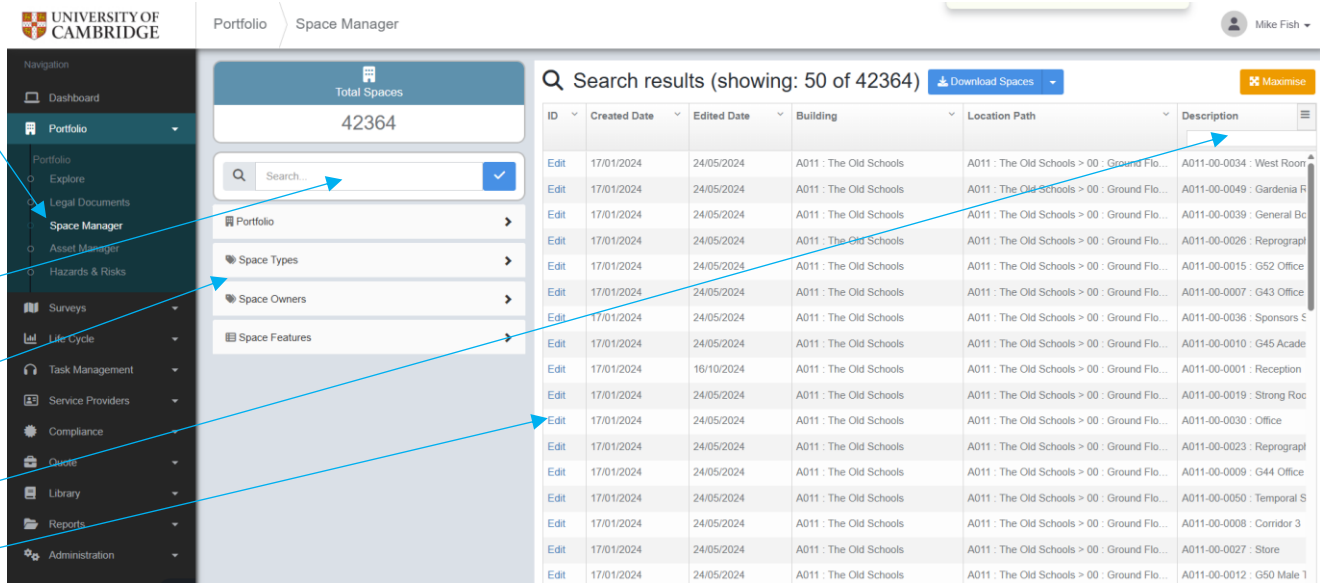
Edit details.

B4

Use the *Download Spaces* button to create an Excel file of listed locations.

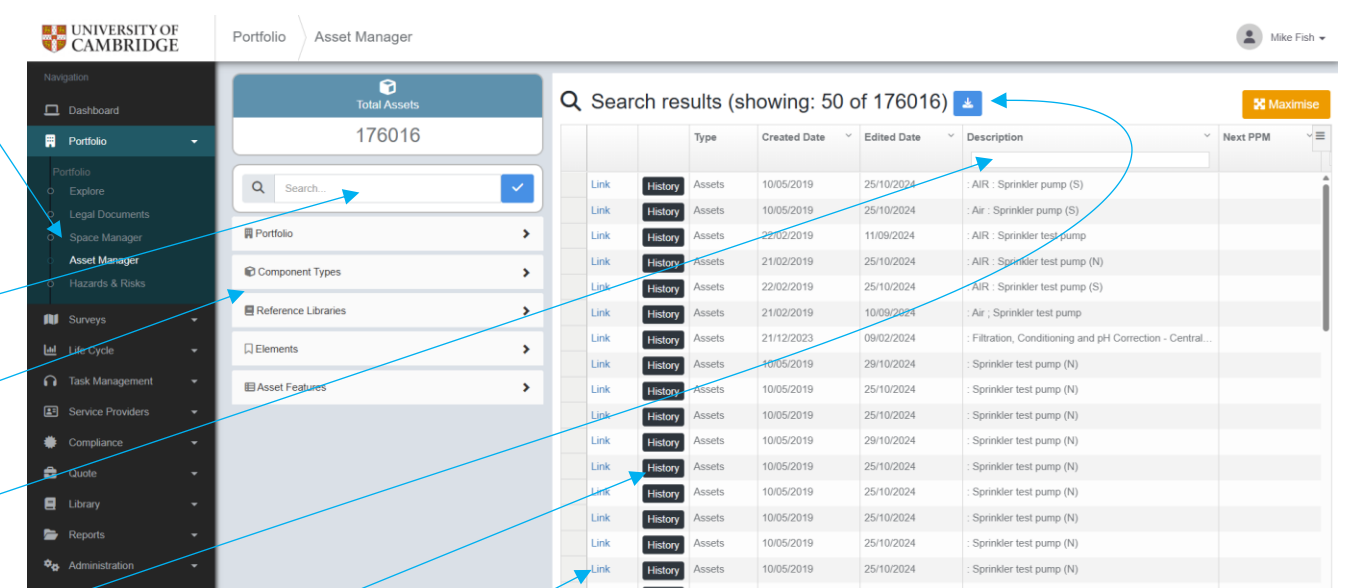
B5

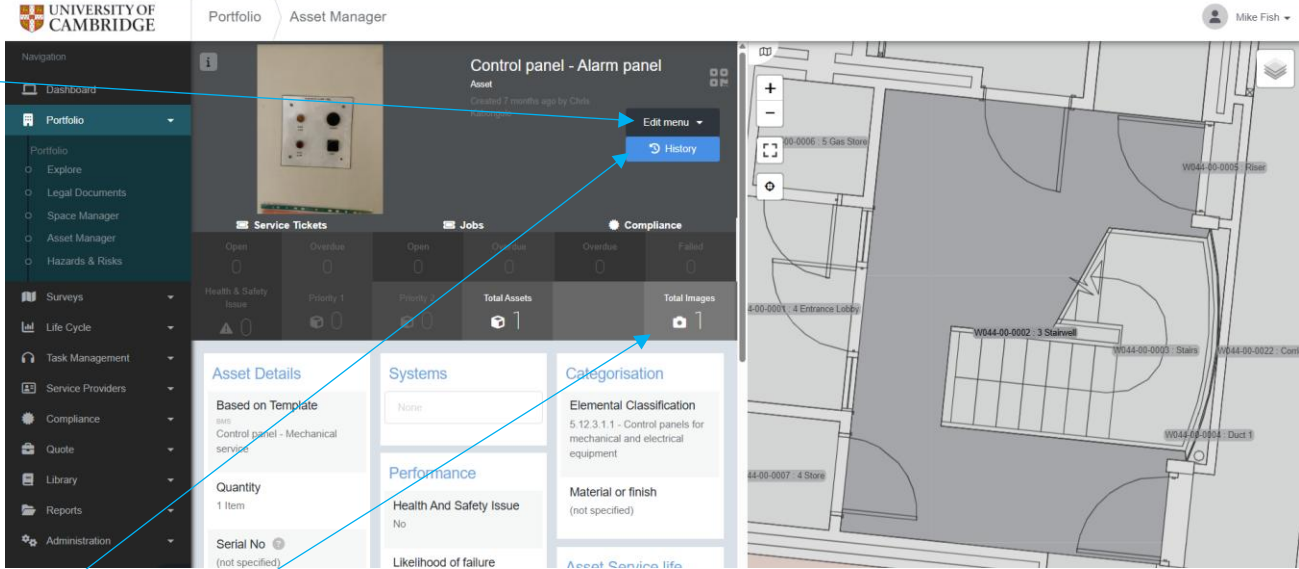
Clicking the small arrow next to *Download Spaces* gives the additional option of saving the current filtered view.



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Task C: Asset Manager

C1	Navigate to <i>Portfolio</i> > <i>Asset Manager</i> .	
C2	Find an asset by:	
d.	searching by keyword.	
e.	using a filter.	
f.	searching in a column header.	
C3	Use the Download button to create an Excel file of listed assets.	
C4	Click <i>History</i> to view a list of Jobs relating to the asset.	
C5	Click <i>Link</i> to go to asset page ...	

	<p>... From the Asset page:</p> <p>C6 Depending on your role and permissions, you may be able to click here to access the following menu:</p> <div data-bbox="320 537 598 930"> <p>Add Attachment</p> <p>Edit</p> <p>Move</p> <p>Delete</p> <p>Create Job</p> <p>Edit Floor Plans</p> </div> <p>C7 Click to see a Job history relating to the asset.</p> <p>C8 Click tiles to be taken to relevant <i>Ticket</i>, <i>Job</i> or <i>Compliance</i> pages.</p>	
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Task E: Legal Documents

E1

Navigate to *Portfolio* > *Legal Documents*.


E2

A user's view will be limited to the portfolio locations set in their account.

E3

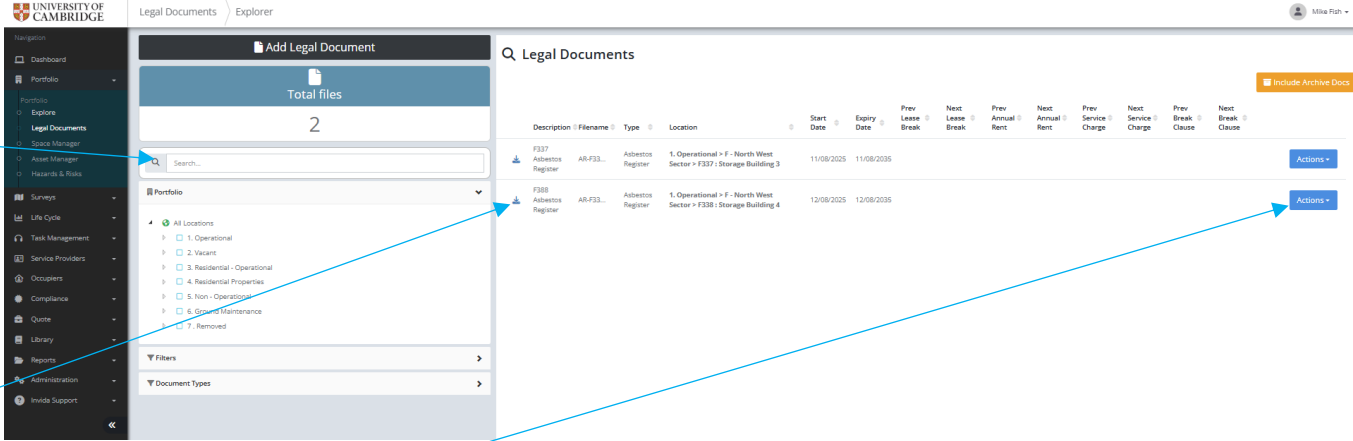
Search by keyword or filter by location or document type.

E4

Click  to download.

E5

Click *Actions* to archive document (permissions dependent) or to view a document history.



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