

Alliant Connect Client Portal

Property Schedules Module



Revision Date

3/6/2014

Table of Contents

| | |
|--|----|
| Accessing Alliant Connect | 2 |
| Logging In | 2 |
| Member List | 3 |
| View a Member's Locations | 4 |
| Location List | 4 |
| Add a Location | 5 |
| Completing the Location Form | 7 |
| Modify a Location | 15 |
| Edit Location number or Location number and 2 nd ID | 15 |
| Edit Scheduled Items | 16 |
| Delete Scheduled Items | 16 |
| Edit Scheduled Storage Tanks | 18 |
| Delete Scheduled Storage Tanks | 19 |
| Delete a Location | 21 |
| Reports | 22 |
| Report Options | 22 |
| Select Report | 22 |
| Include Notes | 22 |
| Email Me | 22 |
| Include All Records for Member or Group | 23 |
| Run a Report | 23 |
| Delete a Report | 24 |
| Preferences | 25 |

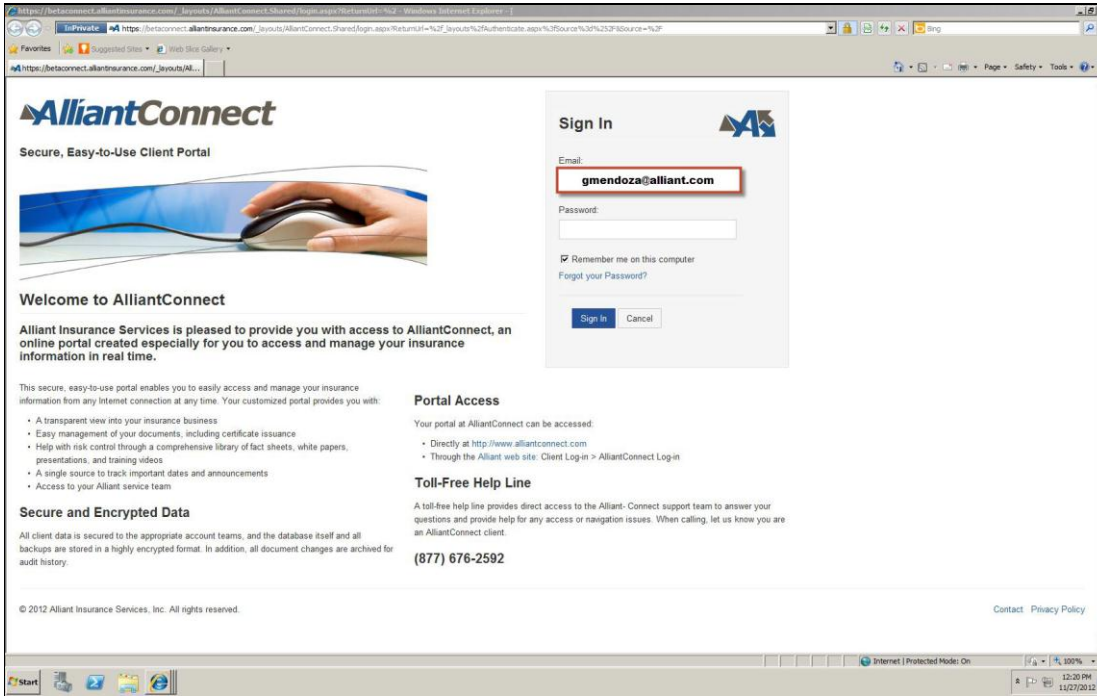
Accessing Alliant Connect

Login

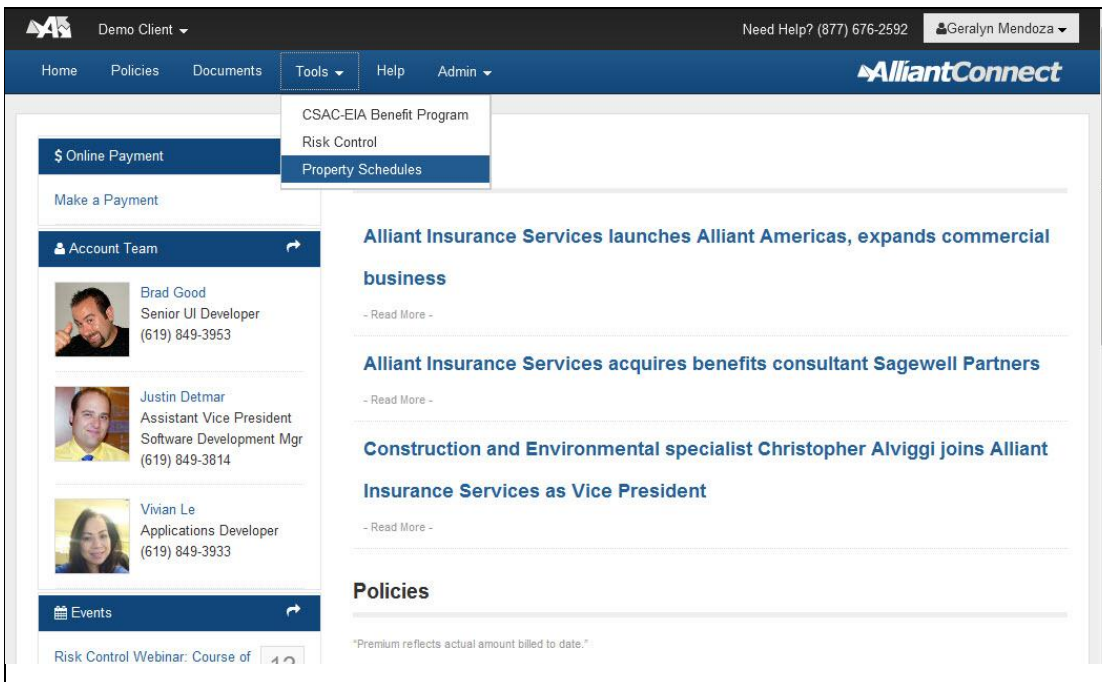
Alliant Connect may be accessed from any internet browser. Type the URL in the address bar:

<https://connect.alliant.com/propertyschedules/MemberList>

From the login page, enter your email address and password then click **Sign In**.

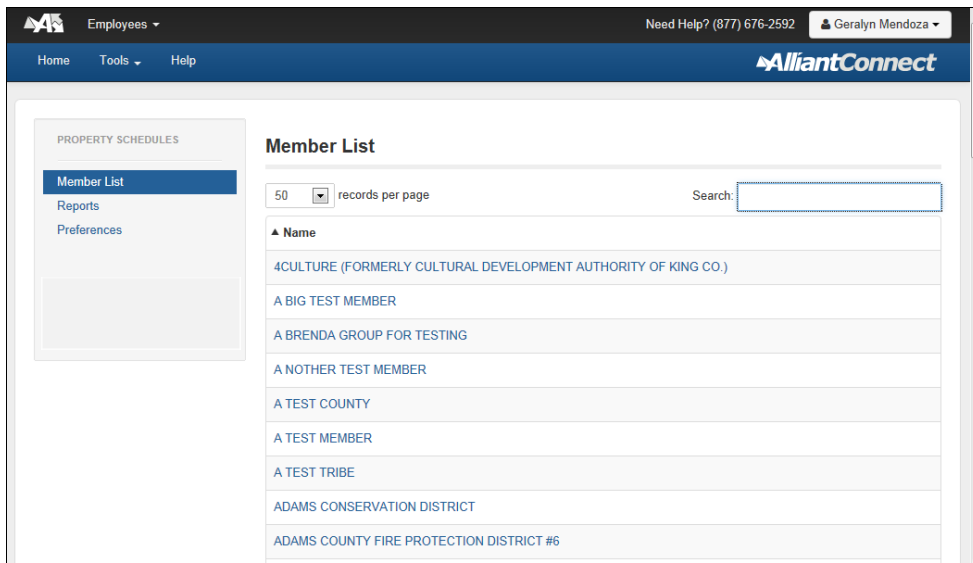


To access Property Schedules, click **Tools** from the menu bar and select **Property Schedules**. Clients without a full site will be taken directly to the Property Schedules Member List page once they log in.



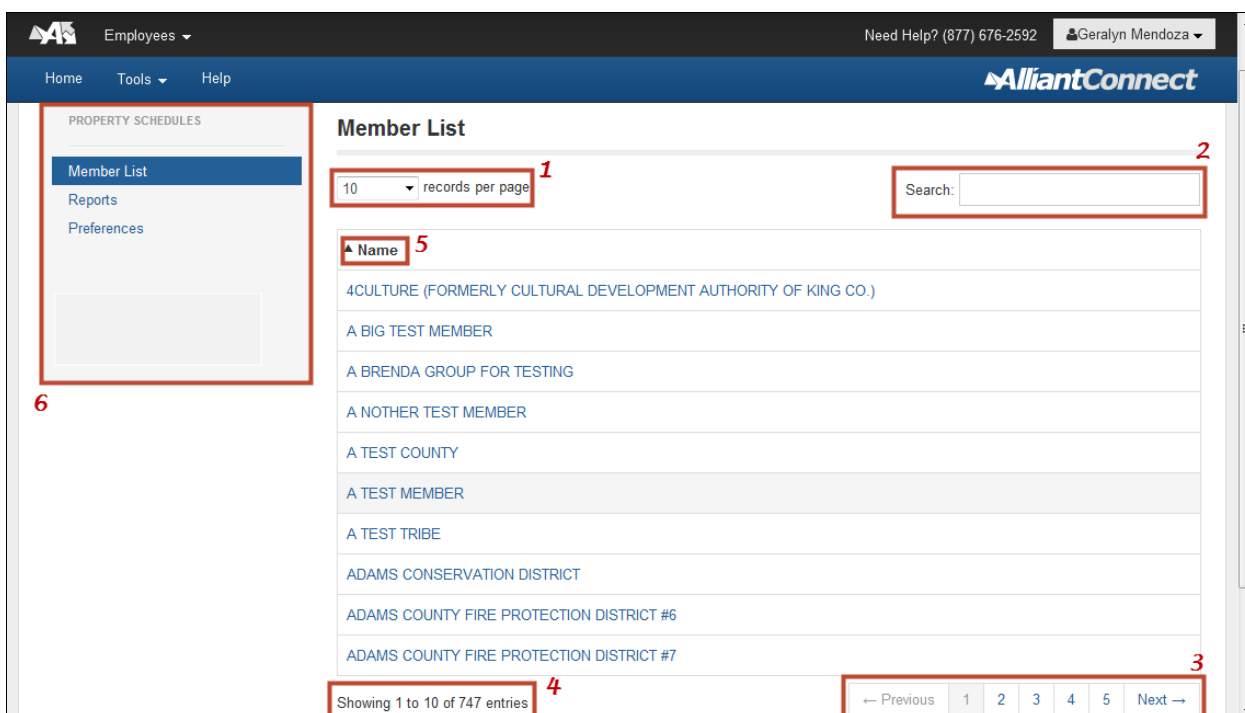
Member List

The Member List page is the main page of the Property Schedules module. This page displays the property member(s) you have access to.



Navigation features available on the Member List page include:

1. Click drop-down arrow to change the number of records displayed per page. Set default in **Preferences**.
2. Use *Search* to filter the list or find a specific member by inputting text or numbers.
3. Click paging buttons to page through the list of members.
4. Indicates number of members displayed on current page with total number of members you have access to.
5. Click carat to change sort list alphabetically ascending or descending.
6. Sub-navigation menu pane located on the left highlights the current screen. It displays other areas available within Property Schedules module .



View a Member's Locations

Click a member name from Member List. The locations for the selected member are displayed in Location List.

| |
|--|
| ADAMS COUNTY PARK & RECREATION DISTRICT #3 |
| ADAMS COUNTY PARK AND RECREATION #1 |
| ADAMS COUNTY PARK AND RECREATION #2 |
| ADAMS COUNTY PARK AND RECREATION DISTRICT #4 |
| ADAMS COUNTY WEED DISTRICT #1 |
| ADMIRAL'S COVE WATER DISTRICT |
| AGING & ADULT CARE OF CENTRAL WASHINGTON |
| AGING & LONG TERM CARE OF EASTERN WASHINGTON |
| AGNEW IRRIGATION DISTRICT |

Location List

The Location List page displays the locations or properties for the selected member.

PROPERTY SCHEDULES

Member List

Location List

Reports

Preferences

Location List ADMIRAL'S COVE WATER DISTRICT

Add a new location

Search

| Loc # | Your Location | Site Description | Occupancy | Address | Total Value |
|-------|---------------|-----------------------|-------------------|------------------|--------------|
| 1 | | BUILDING #1/PUMPHOUSE | WELL/PUMPS | 1283 RICKOVER | \$8,453.00 |
| 2 | | BUILDING #2/PUMPHOUSE | WELL/PUMP | 1283 RICKOVER | \$8,453.00 |
| 3 | | BUILDING #3/STORAGE | STORAGE | 1283 RICKOVER | \$9,765.00 |
| 4 | | BUILDING #4/PUMPHOUSE | WELL/PUMP/STORAGE | 1283 RICKOVER | \$239,033.00 |
| 5 | | CHAINLINK FENCE | | 1283 RICKOVER | \$4,226.00 |
| 12 | | WATER TANK | | 1273 RICKOVER DR | \$102,000.00 |
| 17 | | MEETING ROOM | | 1270 RICKOVER | \$18,571.00 |

Page Size

Page of 1

Total Items: 7

Navigation features available on the Location List page include:

1. Member's name for this location list.
2. Use *Search* to filter the list by inputting your own criteria for *Loc #*, *Your Location*, *Site Description*, *Occupancy*, *Address* or *Total Value Over*.
3. Indicates total number of locations for this member.
4. Indicates current page in view and total number of pages. Use paging buttons to page through the list of locations.
5. Indicates the number of maximum locations displayed per page. Set default in **Preferences**.
6. Click the carat or any column header to sort list alphabetically ascending or descending. The default sort is ascending by Location #.
7. Sub-navigation menu pane located on the left highlights the current screen. It displays other areas available within Property Schedules module.

The screenshot shows the 'Location List' page for 'ADMIRAL'S COVE WATER DISTRICT'. The interface includes a left-hand navigation pane (7) with links for Member List, Location List (selected), Reports, and Preferences. The main content area features a table of locations with columns: Loc #, Your Location, Site Description, Address, and Total Value. A search bar (2) is located above the table, and a 'Add a new location' button is to its left. A dropdown menu (6) is open for the 'Loc #' column header. At the bottom, there is a pagination section (4) showing 'Page 1 of 1' and a 'Page Size' selector (5) set to 100. A 'Total Items: 7' indicator (3) is also present.

| Loc # | Your Location | Site Description | Address | Total Value |
|-------|---------------|-----------------------|------------------|--------------|
| 1 | | BUILDING #1/P | 1283 RICKOVER | \$8,453.00 |
| 2 | | BUILDING #2/PUMPHOUSE | 1283 RICKOVER | \$8,453.00 |
| 3 | | BUILDING #3/STORAGE | 1283 RICKOVER | \$9,765.00 |
| 4 | | BUILDING #4/PUMPHOUSE | 1283 RICKOVER | \$239,033.00 |
| 5 | | CHAINLINK FENCE | 1283 RICKOVER | \$4,226.00 |
| 12 | | WATER TANK | 1273 RICKOVER DR | \$102,000.00 |
| 17 | | MEETING ROOM | 1270 RICKOVER | \$18,571.00 |

Add a Location

1. Select the member from Member List.
2. Click **Add a new location** button on the Location List page.

This screenshot shows the 'Location List' page for 'ADMIRAL'S COVE WATER DISTRICT'. The 'Add a new location' button is highlighted with a red box. The search bar contains 'Loc #'. The table below shows the first two entries:

| Loc # | Your Location | Site Description | Occupancy |
|-------|---------------|-----------------------|------------|
| 1 | | BUILDING #1/PUMPHOUSE | WELL/PUMPS |
| 2 | | BUILDING #2/PUMPHOUSE | WELL/PUMP |

The image shows a screenshot of a web application interface. At the top, there are two blue buttons: "Save Location" and "Cancel". Below these buttons is a section titled "QUICK NAVIGATION" in a light gray box. This section contains a list of links: "Location", "Address", "Property Information", "Construction", "Coverage Options", "Values", "Miscellaneous Information", and "Environmental Information". The "Location" link is highlighted with a light gray background, and a mouse cursor is pointing at it.

On the location form, the sub-navigation menu includes these functions:

1. Save Location – Click **Save Location** to submit once you’ve completed entering all pertinent location information.
2. Cancel – Click **Cancel** to disregard this change. The screen returns to the Location List page.
3. Quick Navigation – The location form is comprised of several sections. Click the link to quickly “jump” to that section instead of scrolling up and down the form.

Completing the Location Form

When adding a new location, please keep these tips in mind:

- Enter *positive* underwriting information.
- Although not all fields are required, enter as much information known about the location/property. Both *required* and *recommended* fields are highlighted on the form.
- Use the *Help text* located next to each field for guidance.
- Use the *Quick Navigation links* on the left to quickly jump to sections of the form.
- Use the text boxes provided to store more information about the property.

The location form is comprised of several sections. For each section, please note special instructions or important information as described below.

Member

The member information is read-only and is configured during the client set up process. Please contact your Alliant representative if changes are required to this section.

| Member | |
|-------------|---------------|
| Name: | A TEST MEMBER |
| Sort Name: | TESTMEMB1 |
| Program: | BCJPIA |
| Group Code: | |
| Group: | |

Location

The location number is *required*. By default, it is auto-populated with the next available number in sequence. It is Alliant's system-generated numeric ID assigned to each location. You may edit this number; however, it must be unique. Do not use an existing location number or combination of location number and 2nd ID that is already in use by this member.

Recommended: Select the *Occupancy Type* from the drop-down list which most closely describes this property. Use the *Occupancy* field to further describe if there's no exact match in the list.

| Location | |
|----------------------|---|
| Loc #* | <input type="text" value="5001"/> <small>*Required - A system-generated numeric ID that may be changed. Sortable column in Location List.</small> |
| 2nd ID(Building ID) | <input type="text"/> <small>Secondary location identifier; use A – ZZ. Use to denote multiple buildings with same address. Sortable column in Location List.</small> |
| Your Location Number | <input type="text"/> <small>Use to denote member's numbering system if applicable. Sortable column in Location List.</small> |
| Occupancy Type | <input type="text" value="-Unknown-"/> <small>*Recommended - Select the type which most closely describes the actual occupancy. Sortable column in Location List.</small> |
| Occupancy | <input type="text"/> <small>Use to further describe occupancy type if not an exact match.</small> |
| Comments | <input type="text"/> <small>Free form text field for member use.</small> |

Address

Recommended: Enter as much address information as known, even partial addresses are accepted. Use the **Copy Address From** button to select an existing address. Skip the *Latitude* and *Longitude* fields as the system will populate the GPS coordinates based on the address.

Address

Copy Address From

Click to select an existing address for this location.

Site Description

**Recommended* - Make as descriptive as possible to easily identify the location.
Sortable column in Location List.

Bldg Description

Free form text field for member use.

Address

**Recommended* - A partial address, parcel, track or lot number is accepted if no street address.

Address2

City

**Recommended*

State

**Recommended*

Zip Code

**Recommended*

Latitude

System will populate GPS coordinates based on the address.

Longitude

System will populate GPS coordinates based on the address.

GPS Notes

Property Information

Enter 4-digit year (YYYY) for *Year Built* and *Year Appraised*.

Do not include a basement in the square footage or as a story.

Property Information

Year Built

Enter year built if known using four-digit format (YYYY)

Year Appraised

Enter year appraised if known using four-digit format (YYYY)

Square Footage of Building

Enter total building square footage excluding basement

Stories

A basement is not considered a story

Construction

Click **Construction Code Help** button for explanations.

Indicate *Alarm type* or click **Lookup** button to select one from the list.

Construction

Construction Code

- UNKNOWN

Construction Code Help

Select best from drop-down list.

Construction Description

ISO Protection Code

Use 1-10 fire protection rating system

Auto Sprinklers?

☐ Check box if sprinklered

% of Building

Enter 1 – 100 if sprinklered

Type

Select sprinkler type ('Dry' is a pressurized system holding water out of the pipes until activated)

Alarms

Lookup

Click Lookup to select best alarm type

Notes

Free form text field for member use

Rent Notes

Free form text field for member use

Coverage Options

The default location coverage options are shown. They are configured during the client set up process. Any changes to coverage(s) here will be submitted to your Alliant representative and will follow established procedures for approval and processing.

Optional Earthquake Secondary Characteristics data may be tracked by clicking **EQ Secondary Characteristics** button.

Place a checkmark in *Course of Construction* if the location is currently under construction and include the estimated completion date.

Coverage Options

System will populate based on member preferences

EQ Zone

System will populate based on zip code

Purchase EQ Coverage for

☒ Real Prop
 ☒ PersProp
 ☐ BI/Rents

EQ Secondary Characteristics

Expanded EQ section not required

Federal Flood Zone

Select Federal Flood Zone

Purchase Flood Coverage for

☐ Real Prop
 ☐ PersProp
 ☐ BI/Rents

Boiler and Machinery

☐

Wind and Hail

☒

Wind Tier

System will Populate Based on Zip Code

Course of Construction

☐ Check if location is currently under construction

9

Values

Enter applicable values for the location. The total value for a location may be comprised of real property, personal property (contents) and BI/TI/rents (business interruption, tax interruption and rents) for a specific policy year. Furthermore, personal property and BI/TI/rents may be scheduled or unscheduled. For Scheduled Items, follow the instructions below. Once you enter the values for real, personal or BI/TI/rents, the *Total Values* is automatically calculated.

3. Input a value for *Total Real Property*.
4. To add a value for *Scheduled Personal Property*:
 - a. Click **Scheduled Items** to open the Scheduled Item form.

Values

Values for Policy Year

Total Real Property Enter real property value

Scheduled Items Click to expand section to list contents (i.e., fine arts, computer or mobile equipment and vehicles). Property items listed here will be summed on Scheduled Personal Property.

Scheduled Personal Property System will sum Scheduled Items with Property value.

Unscheduled Personal Property Value of contents if not listed as a scheduled item.

Scheduled BI/TI/Rents System will sum Scheduled Items with BI/TI/Rent value.

Unscheduled BI/TI/Rents Value of BI/TI/Rent if not listed as a scheduled item.

Total Values System will sum all values.

- b. Select the item type then enter *Property* value. Place a checkmark if inflation factor should be applied to this item. Enter notes as needed. Click **Save Scheduled Item**.

Scheduled Items

Type Select item type from list

Property Enter value of contents

Trend ☐ Check box to apply inflation factor

BI/TI/Rent Enter value of business, tax interruption or rent

Notes Free form text field for member use

Save Scheduled Item Cancel

- c. The Scheduled Item is saved and the value of *Scheduled Personal Property* is updated automatically.

Scheduled Item

New Scheduled Item

| Type | Property | Trend | BI/TI/Rent |
|------------------|----------|-------|------------|
| OFFICE FURNITURE | 2500 | No | |

Scheduled Personal Property System will sum Scheduled Items with Property value.

5. To add a value for *Scheduled BI/TI/Rents*:
- Click **New Scheduled Item** to open the Scheduled Item form.
 - Select the item type then enter *BI/TI/Rent* value. Place a checkmark if inflation factor should be applied to this item. Enter notes as needed. Click **Save Scheduled Item**.

Scheduled Items

Type Select item type from list

Property Enter value of contents

Trend ☐ Check box to apply inflation factor

BI/TI/Rent Enter value of business, tax interruption or rent

Notes Free form text field for member use

Save Scheduled Item Cancel

- c. The Scheduled Item is saved and the value of *Scheduled BI/TI/Rents* is updated automatically.

Scheduled Item

New Scheduled Item

| Type | Property | Trend | BI/TI/Rent |
|------------------|----------|-------|------------|
| OFFICE FURNITURE | 2500 | No | |
| BI/RENTS | | No | 5000 |

Scheduled Personal Property System will sum Scheduled Items with Property value.

Unscheduled Personal Property Value of contents if not listed as a scheduled item.

Scheduled BI/TI/Rents System will sum Scheduled Items with BI/TI/Rent value.

6. Input a value for *Unscheduled Personal Property*.
7. Input a value for *Unscheduled BI/TI/Rents*.
8. Once all the values are entered, Total Values automatically displays the sum as shown:

Total Real Property

1000000

Enter real property value

Scheduled Item

New Scheduled Item

| Type | Property | Trend | BI/TI/Rent |
|------------------|----------|-------|------------|
| OFFICE FURNITURE | 2500 | No | |
| BI/RENTS | | No | 5000 |

Scheduled Personal Property

2500

System will sum Scheduled Items with Property value.

Unscheduled Personal Property

3500

Value of contents if not listed as a scheduled item.

Scheduled BI/TI/Rents

5000

System will sum Scheduled Items with BI/TI/Rent value.

Unscheduled BI/TI/Rents

4500

Value of BI/TI/Rent if not listed as a scheduled item.

Total Values

1,015,500

System will sum all values.

Miscellaneous Information

By default, new locations are set to 'Owned.'

Tower is populated by Alliant.

Miscellaneous Information

This Location is

☒ Owned
 ☐ Leased

Location is 'Owned' by default. If you are leasing the building out, it is still owned by you. A leased location is a building or location leased by you from another party.

Allocation Code

Free form text field for member use

Tower

INDV

System will populate this field

Environmental Information

This section is available only to environmental members to document disposal and storage tank information.

9. To add an underground storage tank:
 - a. Click **Scheduled Storage Tank** to open the Storage Tank form.

Environmental Information

Hazard Level

This is a Non-Owned Disposal Site ☐

Do All AST/USTs Meet Requirements? ☐

Explain Above

Do you have plans to remove any AST/USTs in the next year? ☐

Explain Above

Scheduled Storage Tanks

Click to expand section to list underground storage tanks

- b. Enter the storage tank information then click **Save**.

Aboveground / Underground Storage Tank

Unit ID

UST/AST

Contents

Construction

Capacity (gal)

Year Constructed

Secondary Cont.

Last Tested

Type

Notes

Save Cancel

- c. The scheduled storage tank is saved.

| Aboveground / Underground Storage Tank | | | | | | | |
|--|---------|----------|------------------------|----------------|-----------|-----------|----------------|
| <div>New</div> | | | | | | | |
| Unit ID | UST/AST | Contents | Const | Capacity (gal) | Yrs Const | 2nd Cont | Type |
| TANK123-LOC100A | UST | OTHER | DOUBLE WALL FIBERGLASS | 45 | 2013 | PIT LINER | INTEGRITY TEST |

Submit New Location

10. Click **Save Location** once data entry is complete on the location form.

Save Location

Cancel

11. Upon saving the location, the screen returns to the Location List page where you will see the new location. Your request has been submitted to your Alliant representative.

Note: Upon selecting the new location, the following message is displayed at the top of the location form. The message will be cleared once your Alliant representative has processed the change.

Property Schedule

*User changes pending Alliant Insurance Services acceptance.

Member

Name: A TEST MEMBER

Sort Name: TESTMEMB1

Program: BCJPIA

Group Code:

Group:

Location

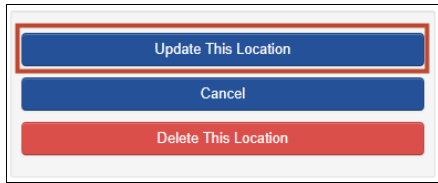
Loc #*

100

*Required - A system column in Location List

Modify a Location

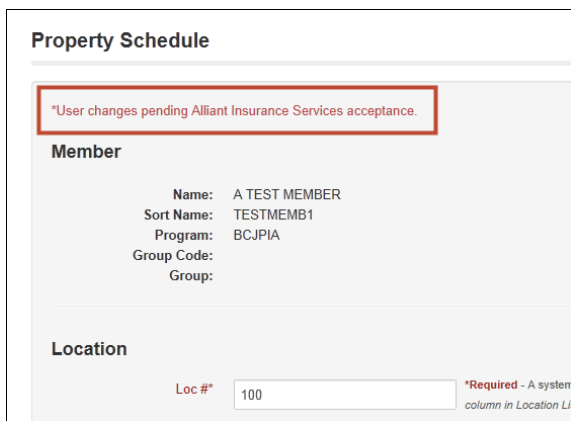
1. Select the member from Member List.
2. From the Location List, click on the location you wish to modify.
3. Edit the property information on the location form. Note special considerations when editing specific items below.
4. Click **Update This Location**.



A screenshot of a form containing three buttons. The top button is blue with the text "Update This Location". The middle button is blue with the text "Cancel". The bottom button is red with the text "Delete This Location".

5. Upon saving the location, the screen returns to the Location List page. Your request has been submitted to your Alliant representative.

Note: Upon selecting the modified location, the following message is displayed at the top of the location form. The message will be cleared once your Alliant representative has processed the change.

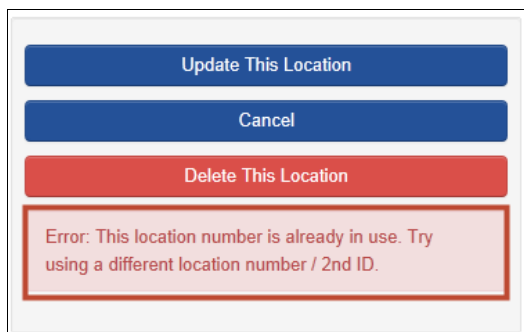


A screenshot of a "Property Schedule" form. At the top, a message box states: "*User changes pending Alliant Insurance Services acceptance." Below this, the "Member" section displays: Name: A TEST MEMBER, Sort Name: TESTMEMB1, Program: BCJPIA, Group Code: , and Group: . The "Location" section has a "Loc #" field with the value "100" and a red asterisk indicating it is required. A small note at the bottom right says "*Required - A system column in Location List".

Edit Location number or Location number and 2nd ID

Remember, you may not use an existing location number or combination of location number and 2nd ID that is already in use by this member. It must be unique. If a duplicate is found, the following error message is displayed when you click

Update This Location:



A screenshot of a form containing three buttons: "Update This Location" (blue), "Cancel" (blue), and "Delete This Location" (red). Below the buttons, a red-bordered box contains the following error message: "Error: This location number is already in use. Try using a different location number / 2nd ID."

Edit Scheduled Items

To modify a scheduled item, save the scheduled item change first then click update this location. For example, to change the value of Fine Arts from 15000 to 20000:

1. In the Values section, click *Fine Arts* in Scheduled Item to open this item.

| Scheduled Item | | | |
|--------------------|----------|-------|------------|
| New Scheduled Item | | | |
| Type | Property | Trend | BI/TI/Rent |
| BI/RENTS | | No | 25000 |
| FINE ARTS * | 15000 | Yes | |

2. The Scheduled Item detail is displayed. Edit the values as needed then click **Save Scheduled Item**.

| | |
|--|---|
| Scheduled Items | |
| Type | FINE ARTS * <small>Select item type from list</small> |
| Property | 20,000 <small>Enter value of contents</small> |
| Trend | <input checked="" type="checkbox"/> Check box to apply inflation factor |
| BI/TI/Rent | 0 <small>Enter value of business, tax interruption or rent</small> |
| Notes | 3 PAINTINGS IN LOBBY <small>Free form text field for member use</small> |
| Save Scheduled Item Cancel Delete | |

3. If no other changes are required, click **Update This Location** to submit the location change to your Alliant representative.

| |
|-----------------------------|
| Update This Location |
| Cancel |
| Delete This Location |

Delete Scheduled Items

To delete a scheduled item, delete the scheduled item first then click update this location. For example, to delete the Office Furniture scheduled item:

4. In the Values section, click *Office Furniture* in Scheduled Item to open this item.

Scheduled Item

New Scheduled Item

| Type | Property | Trend | BI/TI/Rent |
|------------------|----------|-------|------------|
| OFFICE FURNITURE | 2500 | No | |
| BI/RENTS | | No | 5000 |

5. The Scheduled Item detail is displayed. Click **Delete**.

Scheduled Items

Type: OFFICE FURNITURE Select item type from list

Property: 2,500 Enter value of contents

Trend: ☐ Check box to apply inflation factor

BI/TI/Rent: 0 Enter value of business, tax interruption or rent

Notes: DESKS, CHAIRS AND FILING CABINETS Free form text field for member use

Save Scheduled Item Cancel Delete

6. Click **OK** to confirm delete.

Message from webpage

Are you sure you want to delete this scheduled item?

OK Cancel

7. The Scheduled Item is removed.

Scheduled Item

New Scheduled Item

| Type | Property | Trend | BI/TI/Rent |
|----------|----------|-------|------------|
| BI/RENTS | | No | 5000 |

8. If no other changes are required, click **Update This Location** to submit the location change to your Alliant representative.

Update This Location

Cancel

Delete This Location

Edit Scheduled Storage Tanks

To modify a scheduled tank, save the storage tank change first then click update this location. For example, to change the Capacity value from 45 to 55:

1. In the Environmental Information section, select the tank to open this item.

| Aboveground / Underground Storage Tank | | | | | | | |
|--|---------|----------|------------------------|----------------|-----------|-----------|----------------|
| New | | | | | | | |
| Unit ID | UST/AST | Contents | Const | Capacity (gal) | Yrs Const | 2nd Cont | Type |
| TANK123-LOC100A | UST | OTHER | DOUBLE WALL FIBERGLASS | 45 | 2013 | PIT LINER | INTEGRITY TEST |

2. The Storage Tank detail is displayed. Edit the values as needed then click **Save**.

Storage Tanks

Unit ID

TANK123-LOC100A

UST/AST

UST

Contents

OTHER

Construction

DOUBLE WALL FIBERGLASS

Capacity (gal)

55

Year Constructed

2013

Secondary Cont.

PIT LINER

Last Tested

12/2013

Type

INTEGRITY TEST

Notes

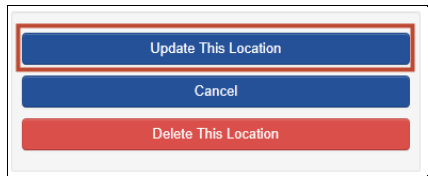
NEXT INSPECTION DUE 12/2016

Save

Cancel

Delete

- If no other changes are required, click **Update This Location** to submit the location change to your Alliant representative.



Update This Location

Cancel

Delete This Location

Delete Scheduled Storage Tanks

To delete a scheduled tank, delete the storage tank first then click update this location.

- In the Environmental Information section, select the tank to open this item.

| Aboveground / Underground Storage Tank | | | | | | | |
|--|---------|----------|------------------------|----------------|-----------|-----------|----------------|
| New | | | | | | | |
| Unit ID | UST/AST | Contents | Const | Capacity (gal) | Yrs Const | 2nd Cont | Type |
| TANK123-LOC100A | UST | OTHER | DOUBLE WALL FIBERGLASS | 45 | 2013 | PIT LINER | INTEGRITY TEST |

- The Storage Tank detail is displayed. Click **Delete**.

Storage Tanks

Unit ID: TANK123-LOC100A

UST/AST: UST

Contents: OTHER

Construction: DOUBLE WALL FIBERGLASS

Capacity (gal): 55

Year Constructed: 2013

Secondary Cont: PIT LINER

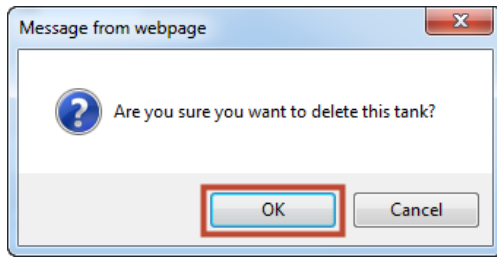
Last Tested: 12/2013

Type: INTEGRITY TEST

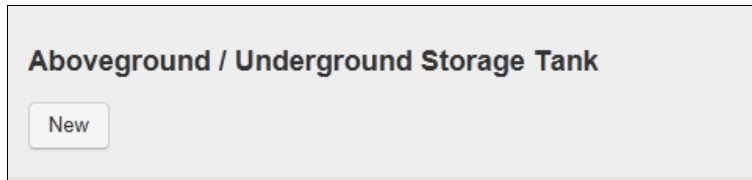
Notes: NEXT INSPECTION DUE 12/2016

Save Cancel **Delete**

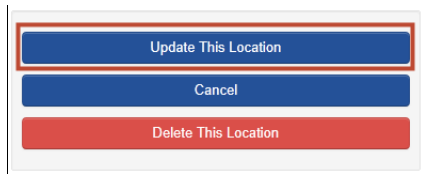
3. Click **OK** to confirm delete.



4. The Scheduled Storage Tank is removed.



5. If no other changes are required, click **Update This Location** to submit the location change to your Alliant representative.



Delete a Location

1. Select the member from Member List.
2. From the Location List, click on the location you wish to delete.
3. The location form is displayed. From the sub-navigation menu pane, click **Delete This Location**.

Employees ▾ Need Help? (877) 676-2592 GERALYN MENDOZA ▾

Home Tools ▾ Help AlliantConnect

PROPERTY SCHEDULES

Member Lists

Location Lists

Reports

Preferences

Update This Location

Cancel

Delete This Location

QUICK NAVIGATION

Location

Property Schedule

Member

Name: A TEST MEMBER
Sort Name: TESTMEMB1
Program: BCJPIA
Group Code:
Group:

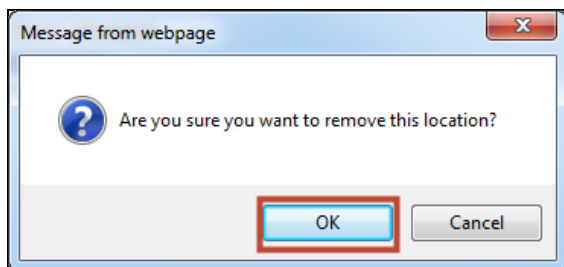
Location

Loc #* 1
*Required - A system-generated numeric ID that may be changed. Sortable column in Location List.

2nd ID(Building ID)
Secondary location identifier; use A – ZZ. Use to denote multiple buildings with same address. Sortable column in Location List.

Your Location Number 1112A
Use to denote member's number system if applicable. Sortable column in

4. Click **OK** to confirm the delete request.



5. The Location List page is displayed and the location is removed from the list. The delete request has been submitted to your Alliant representative.

Reports

Reports may be run in the Property Schedules module.

The screenshot shows the AlliantConnect web application interface. At the top, there is a navigation bar with 'Employees' and 'Need Help? (877) 676-2592' on the left, and a user profile 'Geraldyn Mendoza' on the right. Below this is a secondary navigation bar with 'Home', 'Tools', and 'Help'. The main content area is titled 'Property Schedule Reports'. On the left side of this area is a sidebar menu with 'PROPERTY SCHEDULES' at the top, followed by 'Member Lists', 'Location Lists', 'Reports' (which is highlighted with a red box), 'Report Queue', and 'Preferences'. The main content area contains the following options: 'Select Report:' with a dropdown menu showing 'Property Schedule without Scheduled Items'; 'Include Notes:' with an unchecked checkbox; 'Email me when the report is ready:' with an unchecked checkbox; 'Include All Records for Member A BIG TEST MEMBER:' with a selected radio button; and 'Include All Records for Group TESTGROUP:' with an unselected radio button. A 'Submit' button is located at the bottom right of the form.

Report Options

Select Report

Three reports are available:

1. Property Schedule without Scheduled Items – A formatted PDF report which includes a list of each member’s locations with key property attributes and associated values for the current and previous policy year.
 - a. Member report – The member’s grand totals are presented on the last page. Grand totals on the member report include the sum of all location values for the current and previous policy year.
 - b. Group report – The group’s grand totals are presented on the last page. Grand totals on the group report include the sum of all their member’s location values for the current and previous policy year.
2. Property Schedule with Scheduled Items – A formatted PDF report which includes a list of each member’s locations with key property attributes including scheduled items and associated values for the current and previous policy year.
 - a. Member report – The member’s grand totals are presented on the last page. Grand totals on the member report include the sum of all location values for the current and previous policy year.
 - b. Group report – – The group’s grand totals are presented on the last page. Grand totals on the group report include the sum of all their member’s location values for the current and previous policy year.
3. Property Schedule Export to Excel – An Excel export of each location for the member or group with its property attributes and associated values.

Include Notes

Place a checkmark to display *Notes* and *Rent Notes* on the report.

Email Me

Place a checkmark to receive an email notification when the report is complete.

Include All Records for Member or Group

A report may be run for a single member or for all members in a group if applicable.

Run a Report

1. Select a member from Member List.
2. Click **Reports** from the menu.
3. Select the desired report options then click **Submit**.

The screenshot shows the 'Property Schedule Reports' form in the AlliantConnect interface. The left sidebar contains a menu with 'Reports' highlighted. The main form area has the following fields:

- Select Report:** A dropdown menu with 'Property Schedule without Scheduled Items' selected.
- Include Notes:** An unchecked checkbox.
- Email me when the report is ready:** An unchecked checkbox.
- Include All Records for Member:** A checked radio button, with 'CITY OF AARON:' displayed below it.
- Include All Records for Group:** An unchecked radio button, with 'TESTGROUP:' displayed below it.
- Submit:** A button highlighted with a red rectangle.

At the bottom of the page, there is a copyright notice: '© 2014 Alliant Insurance Services, Inc. All rights reserved.' and links for 'Contact' and 'Privacy Policy'.

4. The Report Queue window is displayed. The report status is *Pending*. Click **Refresh** to update the page.

The screenshot shows the 'Property Schedule Reports Status' table in the AlliantConnect interface. The left sidebar contains a menu with 'Report Queue' highlighted. The table displays the following data:

| Requested | Description | Status | File Size (bytes) | Completed | Email Me | |
|---------------------|---|----------|-------------------|---------------------|----------|--------|
| 2/5/2014 1:50:46 PM | Property Schedule without Scheduled Items | PENDING | - | - | Yes | |
| 2/5/2014 1:16:25 PM | Property Schedule with Scheduled Items | FINISHED | 164,860 | 2/5/2014 1:16:28 PM | Yes | Delete |
| 2/5/2014 1:15:46 PM | Property Schedule with Scheduled Items | FINISHED | 167,642 | 2/5/2014 1:15:49 PM | Yes | Delete |
| 2/5/2014 1:13:43 PM | Property Schedule with Scheduled Items | FINISHED | 124,701 | 2/5/2014 1:13:45 PM | Yes | Delete |
| 2/5/2014 1:12:18 PM | Property Schedule with Scheduled Items | FINISHED | 120,987 | 2/5/2014 1:12:20 PM | Yes | Delete |
| 2/5/2014 1:01:02 PM | Property Schedule with Scheduled Items | ERROR | - | - | Yes | |
| 2/5/2014 9:46:59 AM | Property Schedule with Scheduled Items | FINISHED | 896,129 | 2/5/2014 9:47:16 AM | Yes | Delete |
| 2/4/2014 3:42:39 PM | Property Schedule with Scheduled Items | FINISHED | 286,976 | 2/4/2014 3:42:42 PM | Yes | Delete |
| 2/4/2014 3:42:06 PM | Property Schedule without Scheduled Items | FINISHED | 234,847 | 2/4/2014 3:42:09 PM | Yes | Delete |
| 2/4/2014 3:39:46 PM | Property Schedule with Scheduled Items | FINISHED | 170,016 | 2/4/2014 3:39:49 PM | Yes | Delete |

At the bottom of the table, there is a **Refresh** button highlighted with a red rectangle.

- The report status will change to *Finished* when completed. Click anywhere on the report row to launch the report.

Property Schedule Reports Status

| Requested | Description | Status | File Size (bytes) | Completed | Email Me | |
|---------------------|---|----------|-------------------|---------------------|----------|------------------------|
| 2/5/2014 1:50:46 PM | Property Schedule without Scheduled Items | FINISHED | 144,336 | 2/5/2014 1:50:48 PM | Yes | Delete |
| 2/5/2014 1:16:25 PM | Property Schedule with Scheduled Items | FINISHED | 164,860 | 2/5/2014 1:16:28 PM | Yes | Delete |
| 2/5/2014 1:15:46 PM | Property Schedule with Scheduled Items | FINISHED | 167,642 | 2/5/2014 1:15:49 PM | Yes | Delete |
| 2/5/2014 1:13:43 PM | Property Schedule with Scheduled Items | FINISHED | 124,701 | 2/5/2014 1:13:45 PM | Yes | Delete |
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| 2/5/2014 9:46:59 AM | Property Schedule with Scheduled Items | FINISHED | 896,129 | 2/5/2014 9:47:16 AM | Yes | Delete |
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| 2/4/2014 3:42:06 PM | Property Schedule without Scheduled Items | FINISHED | 234,847 | 2/4/2014 3:42:09 PM | Yes | Delete |
| 2/4/2014 3:39:46 PM | Property Schedule with Scheduled Items | FINISHED | 170,016 | 2/4/2014 3:39:49 PM | Yes | Delete |

[Refresh](#)

Delete a Report

- Click **Report Queue** from the menu.
- Locate the report you wish to delete then click **Delete**. This action permanently removes it from your list.
- Click **OK** to confirm you want to delete the selected report.

Property Schedule Reports Status

| Requested | Description | Status | File Size (bytes) | Completed | Email Me | |
|---------------------|---|----------|-------------------|---------------------|----------|------------------------|
| 2/5/2014 1:50:46 PM | Property Schedule without Scheduled Items | FINISHED | 144,336 | 2/5/2014 1:50:48 PM | Yes | Delete |
| 2/5/2014 1:16:25 PM | Property Schedule with Scheduled Items | FINISHED | 164,860 | 2/5/2014 1:16:28 PM | Yes | Delete |
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| 2/4/2014 3:42:06 PM | Property Schedule without Scheduled Items | FINISHED | 234,847 | 2/4/2014 3:42:09 PM | Yes | Delete |
| 2/4/2014 3:39:46 PM | Property Schedule with Scheduled Items | FINISHED | 170,016 | 2/4/2014 3:39:49 PM | Yes | Delete |

[Refresh](#)

Preferences

Preferences store your configuration settings for Property Schedules:

1. Dataset Name – Indicates the Oasys database name your property data resides in.
2. Location Change Confirmation – Place a checkmark to receive an email notification when you submit a new location or update an existing location.
3. Default # items per page – Select a default value for the maximum number of records displayed for the member and location lists.
4. Click **Save Preferences** to save the settings.

The screenshot displays the AlliantConnect web interface. At the top, there's a navigation bar with 'Employees' and 'Need Help? (877) 676-2592'. Below this is a blue header with 'Home', 'Tools', and 'Help' links, and the 'AlliantConnect' logo. The main content area is titled 'Preferences' and contains a table with three columns: 'Dataset Name', 'Location Change Confirmation', and 'Default # items per page'. The 'Dataset Name' is 'TRAINING', 'Location Change Confirmation' is checked, and 'Default # items per page' is set to 100. A dropdown menu is open for 'Default # items per page', showing options from 5 to 100. A 'Save Preferences' button is located below the table. On the left, a sidebar shows 'PROPERTY SCHEDULES' with links to 'Member List', 'Reports', and 'Preferences'.

| Dataset Name | Location Change Confirmation | Default # items per page |
|--------------|-------------------------------------|--------------------------|
| TRAINING | <input checked="" type="checkbox"/> | 100 |

Save Preferences

5
10
20
30
40
50
75
100

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