Alliant Connect Client Portal

Property Schedules Module

Revision Date

3/6/2014

Note: This document contains software training information and is for client distribution.

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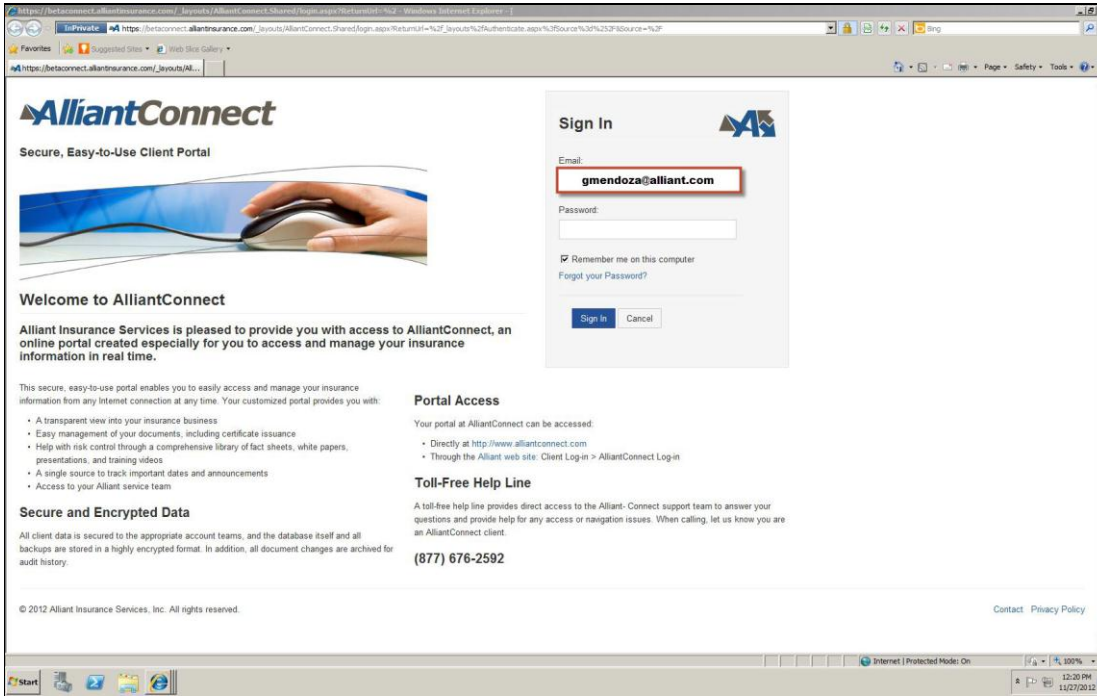# Accessing Alliant Connect

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**.
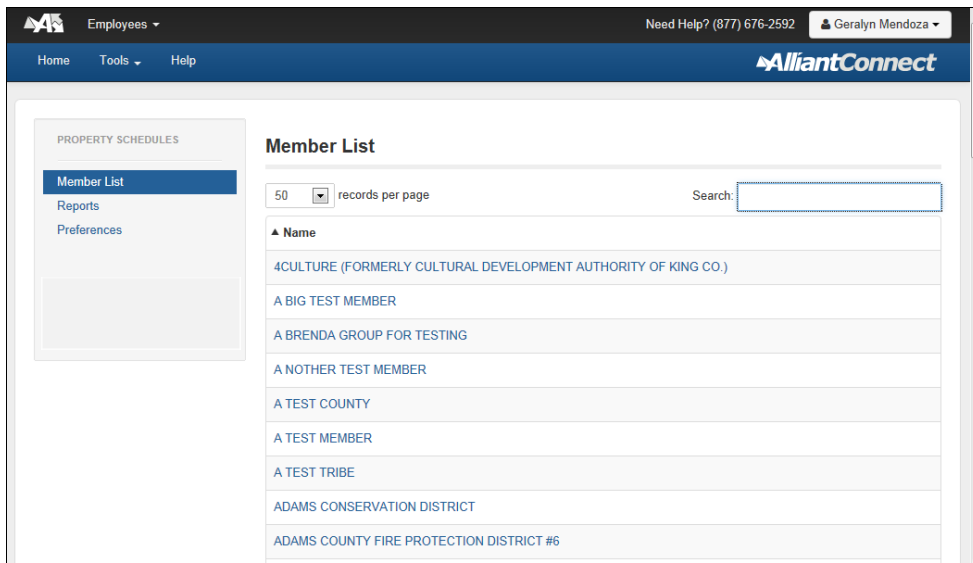

To access Property Schedules, click **Tools** from the menu bar and select **Property Schedules**. Clients without a full site will be taken directly to the Property Schedules Member List page once they log in.
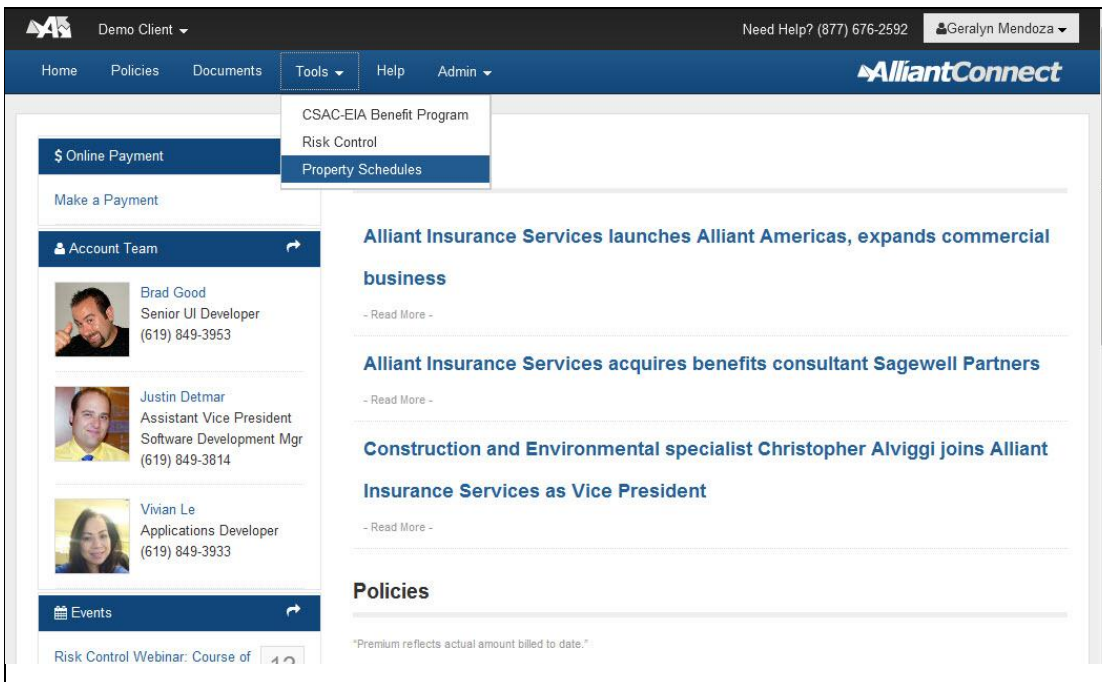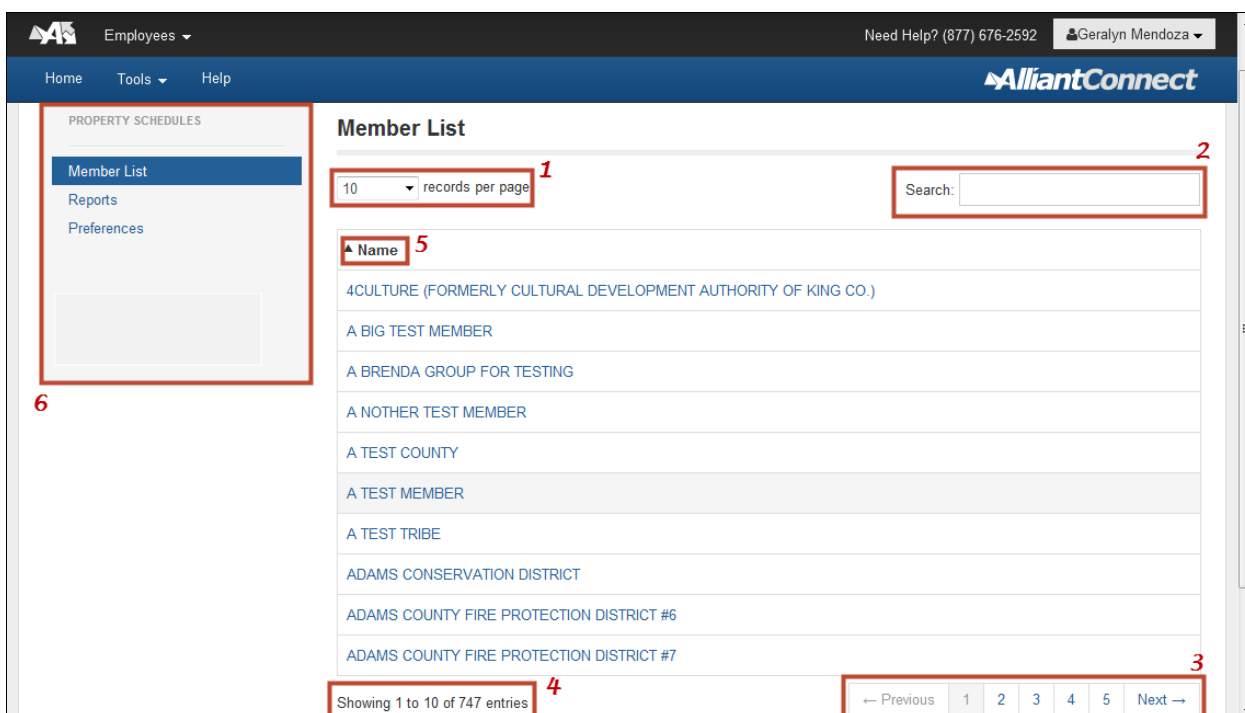
Member List

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.

Location List

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

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.

Add a Location

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

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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 #*	5001	*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		Use to denote member's numbering system if applicable. *Sortable column in Location List.*
Occupancy Type	-Unknown- ▼	*Recommended - Select the type which most closely describes the actual occupancy. *Sortable column in Location List.*
Occupancy		Use to further describe occupancy type if not an exact match.
Comments		Free form text field for member use.

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

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.

    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**.

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

5. To add a value for *Scheduled BI/TI/Rents*:
    a. Click **New Scheduled Item** to open the Scheduled Item form.
    b. 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**.

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

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:

Miscellaneous Information

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

Tower is populated by Alliant.

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.

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

   c. The scheduled storage tank is saved.

Aboveground / Underground Storage Tank

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.

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:	
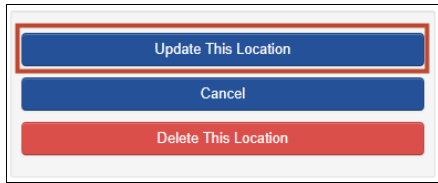
Location

Loc #*   100   *Required - A system column in Location Lis
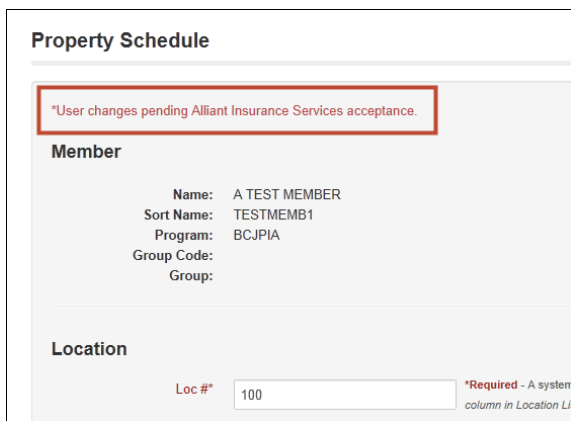
Modify a Location

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**.

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.

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**:

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.

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

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

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.

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

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

7. The Scheduled Item is removed.

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

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.

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

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

Delete Scheduled Storage Tanks

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

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

2. The Storage Tank detail is displayed. Click **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**.

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.

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**.

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

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

Delete a Report

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

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.