Owner/Agent User Guide

City of Lincoln, Nebraska

Apartment Licensing System

Prepared for:
City of Lincoln

Presented By:

06/21/2021

VisualVault

Contents

1 About this Document

The purpose of this document is to provide a user guide/training manual that will assist users as they work in the system.

1.1 Objective

This document provides training materials and information about the usage of VisualVault for the Rental Licensing system.

System functionality includes: User submitted Rental Permits, online payment for permits and associated fees, completing inspections against properties, entering complaints against properties, generating and printing Permits and Invoices.

The specific users are:

- VisualVault Administrators (VaultAccess) – VaultAccess users have access to every part of the solution, including administrative override actions and configuration permissions.
- City Admin – City Administrators have access to all parts of the solution, except for administrative override actions and configuration permissions. Some City Administrators may be VisualVault Administrators.
- City Staff – City office staff have access to review all rental permits, business, and their associate records. They can also submit complaints.
- Chief Inspectors – The Chief Inspector will be able to review and submit complaints, complete inspections, review property and owner information, and waive re-inspection fees.
- City Fire Inspectors – Inspectors will be able to review and submit complaints, complete inspections, and review property and owner information.
- City Housing Inspectors – Inspectors will be able to review and submit complaints, complete inspections, and review property and owner information.
- Rental Owners – Business Owners may create new rental permits, pay fees, manage businesses and properties.
- Rental Agents – Agents may be delegated by Business Owners to help them run their online portal work in the system. They will have access to perform all actions a business owner can perform.

1.2 Contact Us

Questions regarding the content of this document should be addressed to VisualVault professional services by emailing support@visualvault.com.

1.3 Glossary of Terms

The purpose of this section is to define various terms that will be used throughout this document that may not be known by the user.

- API – Application Programmer Interface. This means that software developers may build applications or web services that integrate with VisualVault. Through integration, they can upload or update information in VisualVault. They can also pull information from VisualVault or push information from third-party systems into VisualVault. This is sometimes referred to as an SDK.

- Document ID – Unique identification assigned to every electronic file uploaded into VisualVault.

- ECM – Enterprise Content Management. Used to manage and organize an organization's documents, forms, and other content related to their business processes.

- Electronic File/Documents – Any document or file that can be stored on a computer. This includes typical business-generated documents (Word, Excel, PowerPoint, PDF, etc.) and any electronic file that can be generated from other business systems.

- Form ID – Unique identification assigned to a form record by VisualVault.

- Metadata – Any information that can be stored and helps users identify, classify, or understand the meaning or significance of a document, form, or other item within VisualVault.

- SDK – Software Development Kit. Refer to API above.

2 Owner/Agent Security User Guide

2.1 Introduction

1. The purpose of this user guide is to provide help topics that will aid rental owners and agents in managing their Rental Permits.

2.2 First Time Logging On

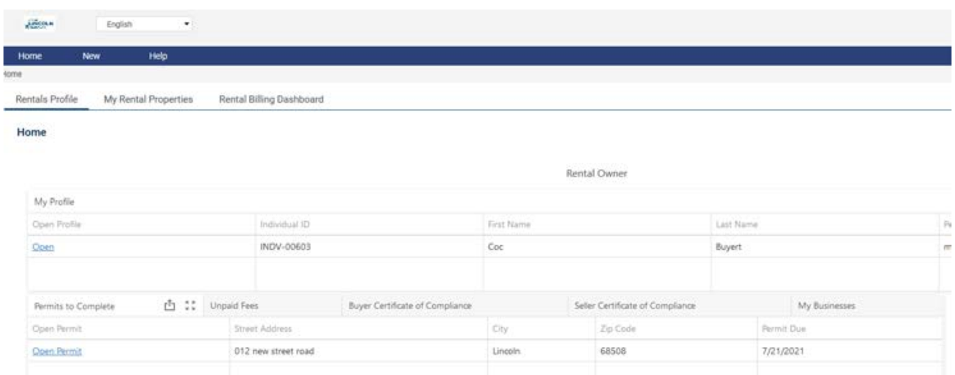
1. After you create your account from the city's website link to VisualVault, you will receive an email with a temporary password and a link to open the logon screen.
2. Look in your inbox for an email with the following subject line: **VisualVault - New Account Created**
3. Click the **URL Link** in the email message and the logon screen will be opened.
4. Use the **Username** and **Temporary Password** found in your email message to logon.
5. You will next be prompted to change your password.
6. Next, **Your Home Page** will be shown on the screen.

2.3 Your Home Page

When you log onto the system, Your Home Page will be opened. **What you see on Your Home Page depends on your role:**

2.3.1 Rental Owner

This is the Home Page that a City Administrator will see. City Staff will see a similar home screen.



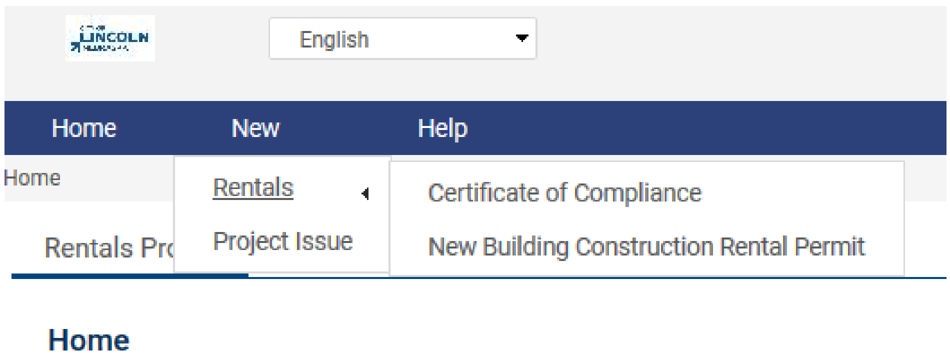
There will be three report options listed across the screen under the menu bar. Click a report title and that report will be opened on screen below the report title. We will use these portal tabs as the start point of navigating to the records outlined in the document.

The default report is Rentals Profile; this is what is open when you first log on.

2.4 Your Main Menu

Rental Owners and Agents will have the same menu bar.

2.4.1 New



Mouse over the New menu item, mouse over the Rentals item, and then click Certificate of Compliance to start a new Certificate of Compliance record in a new browser window. Click New Building Construction Rental Permit to start a new rental permit for a new build construction in a new browser window.

2.4.2 Help

How-To videos and User Guides will be found under the Help menu item.

2.5 Submit a New Building Construction Rental Permit

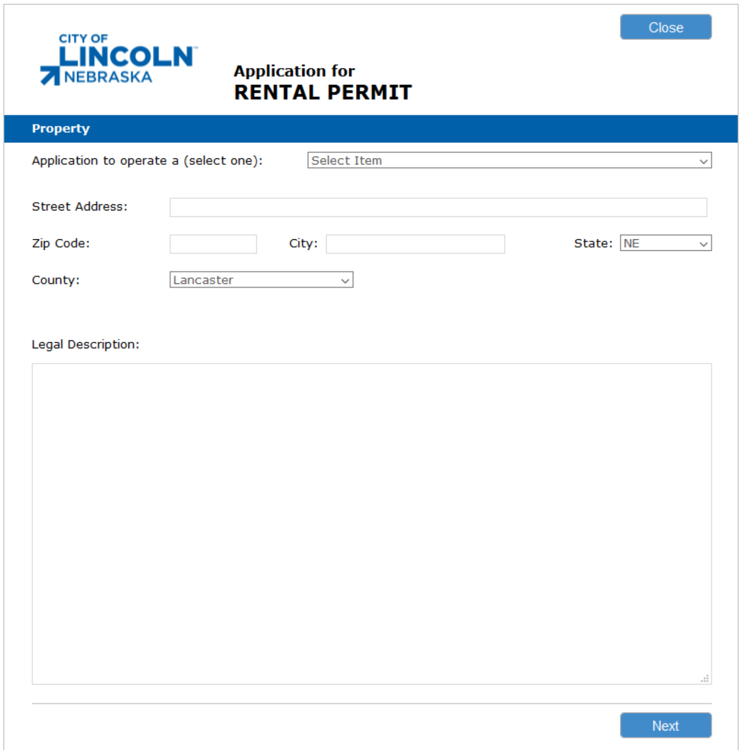
2.5.1 Summary

This rental permit is for a new building construction. All of the outside processes to license your building and prepare it for habitants needs to be completed before you can apply for a New Building Construction Rental Permit.

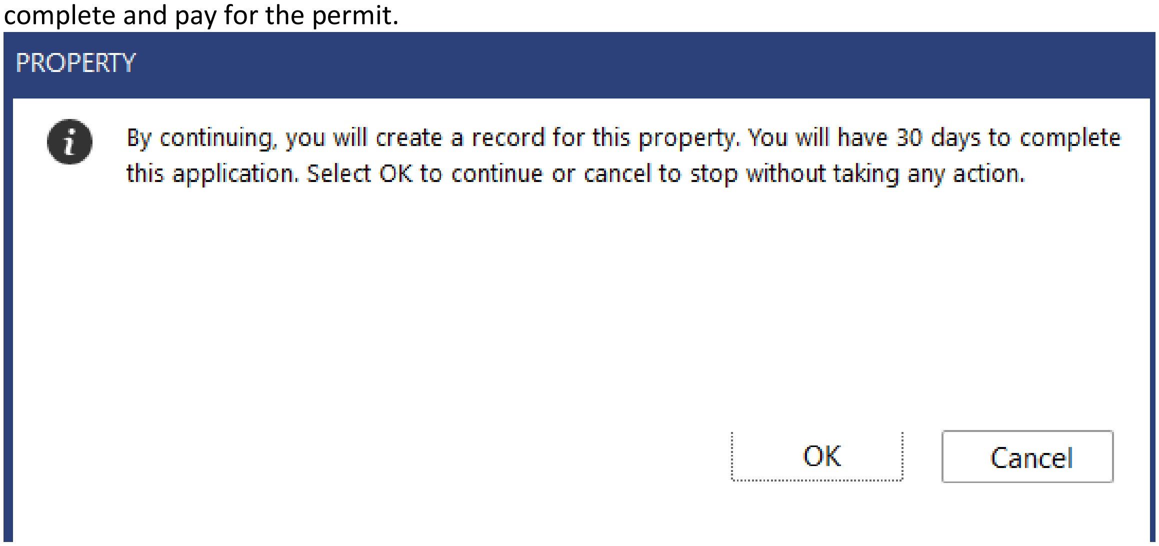
2.5.2 How to Open a Rental Permit.

1. On your blue menu bar, scroll over New, Rentals, and click New Building Construction Rental permit.
2. This will open a new permit in a new window.

2.5.3 Fill In Property Info



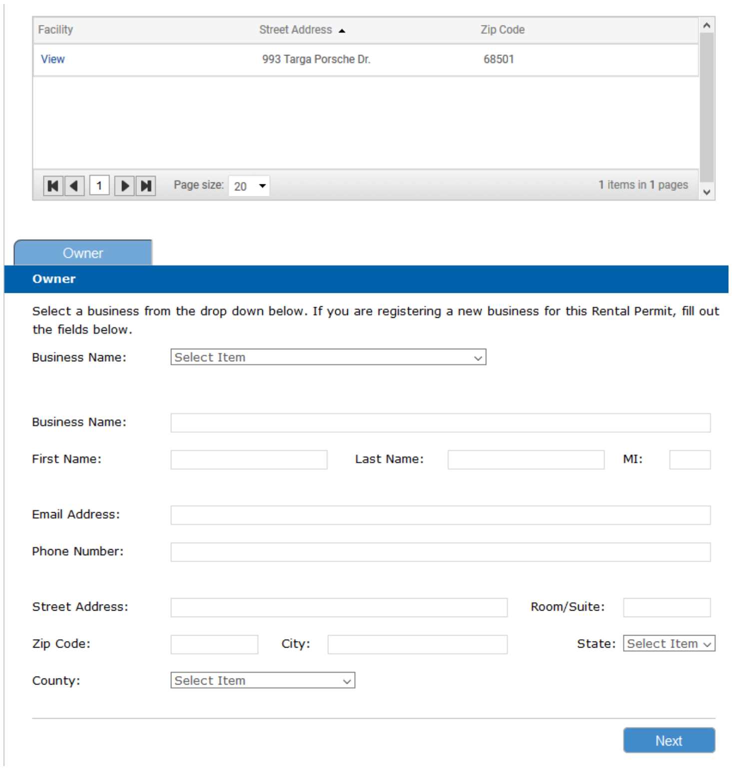
1. This is what the new permit will look like when it is first created.
2. Fill in all fields related to the property you are seeking a permit for. All fields are required.
3. After filling in all fields, click the blue Next button to continue. A popup will appear to confirm you would like to start this permit and indicate the 30days you will have to complete and pay for the permit.



4. Click OK to continue or Cancel to stop the process.

2.5.4 Fill In Owner Information

1. After you have committed property information to the permit, you will be on a new screen to enter owner information. Here is where you will indicate the owner of this rental permit.



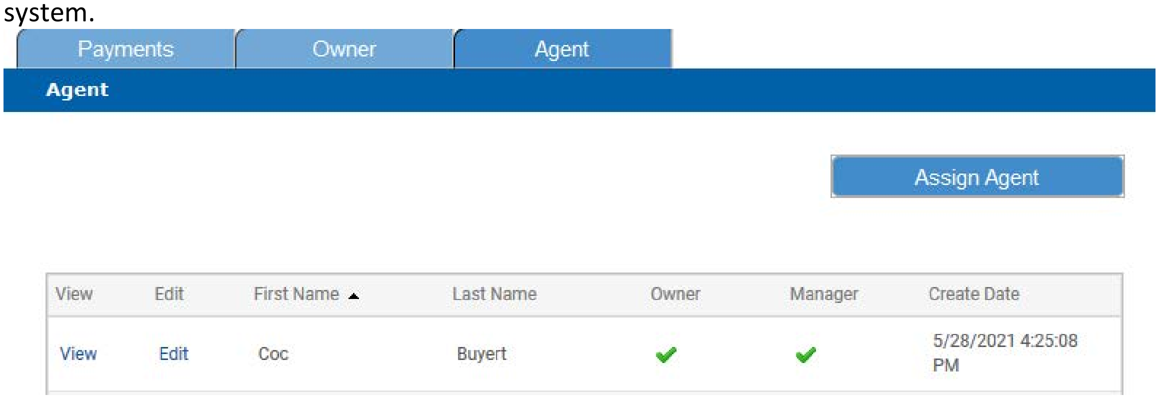
2. If you have a rental business you would like to use already in the system, use the dropdown Business Name to select your desired business. This will populate all fields available with the related information. All fields are required. Click Next when ready to continue. *MI and Room/Suite are not required.

3. If you would like to create a new rental business to own this property, do not select an item from the dropdown. Enter all the fields found on this owner section and click Next. *MI and Room/Suite are not required.

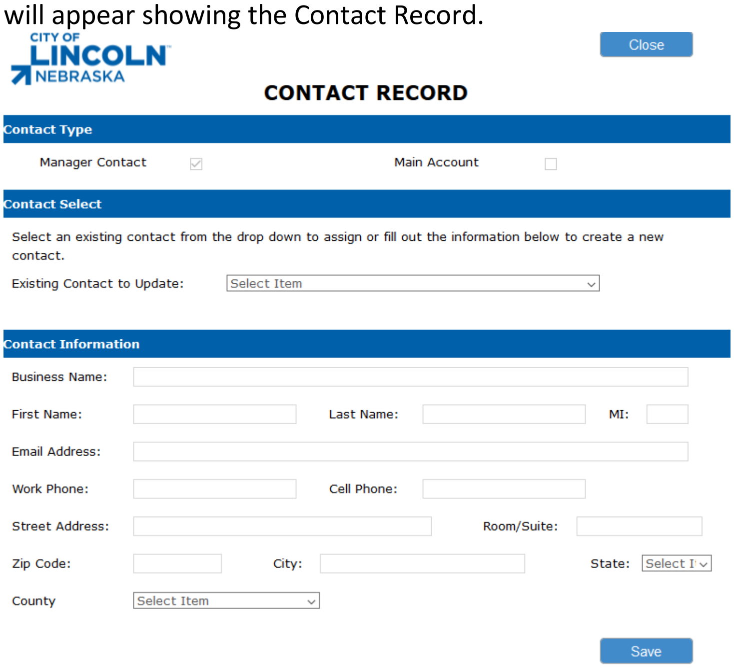
4. When you click Next a pop up will appear confirming you want to proceed with this business information. Click OK to continue or Cancel to go back to the owner information.

2.5.5 Assign Agent (Optional)

1. After a property and owner has been established for this permit, you will find an Agent tab on your screen. Agents are individuals who help you manage your property in the system.



2. If you would like to designate an agent for this property, click the blue Assign Agent button. A popup will appear asking you to confirm creating an agent account. Click the OK button to continue or Cancel to return. If you clicked OK to continue, a new window will appear showing the Contact Record.



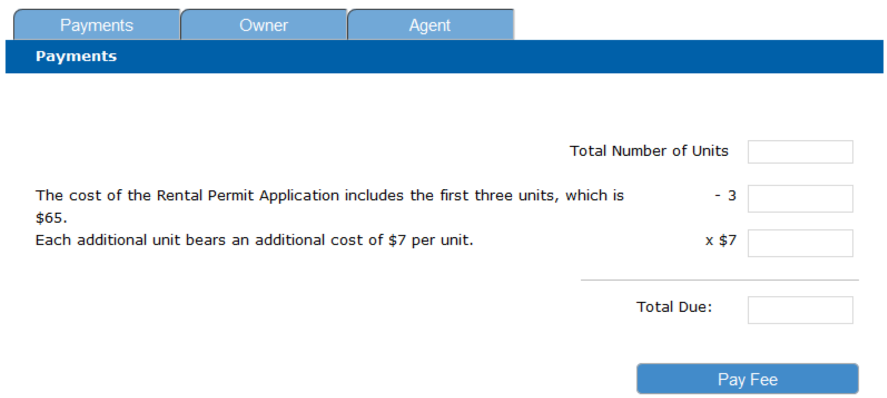
3. All fields are required on this Contact Record, except for Business Name.

4. If you would like to select an agent you have from another property to be added here, select it from the Existing Contact to Update dropdown.

5. Once you have entered in all required fields, click the blue Save button. This will save the individual to your property and permit. Close out of the contact record to return to your outstanding permit.

2.5.6 Calculate and Pay Fee

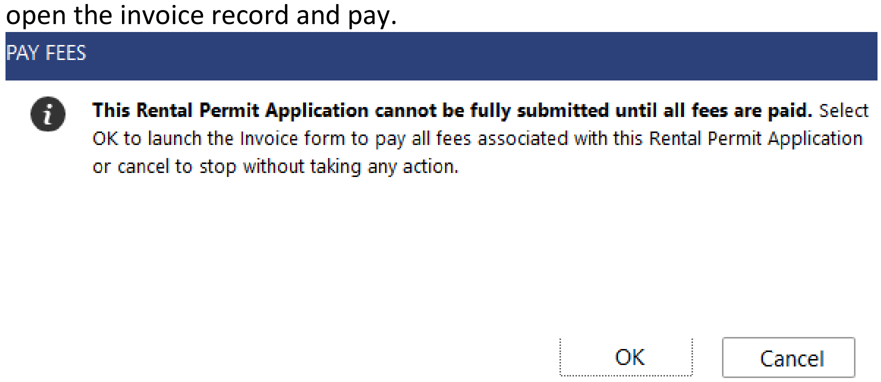
1. After a property and owner has been established for this permit, you will find a Payments section on your screen.



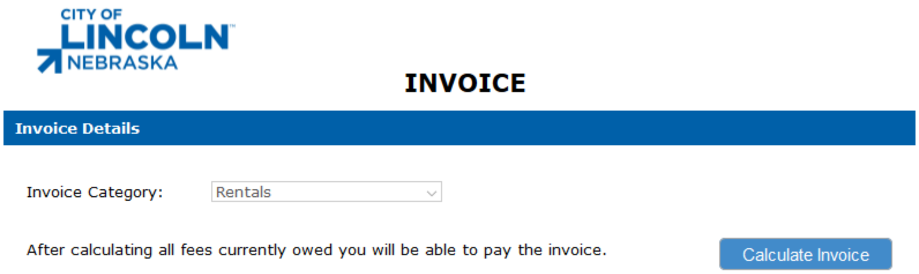
2. Fill In the total number of units found on this property. Once you fill in this number, a calculation will appear showing the total amount due for this rental permit. Keep in mind there is a $65 base fee for this permit, along with the price per unit.

3. After your units are entered and you total due has been calculated, click the blue Pay Fee button. You will get a confirmation popup. Click OK to continue or Cancel to return.

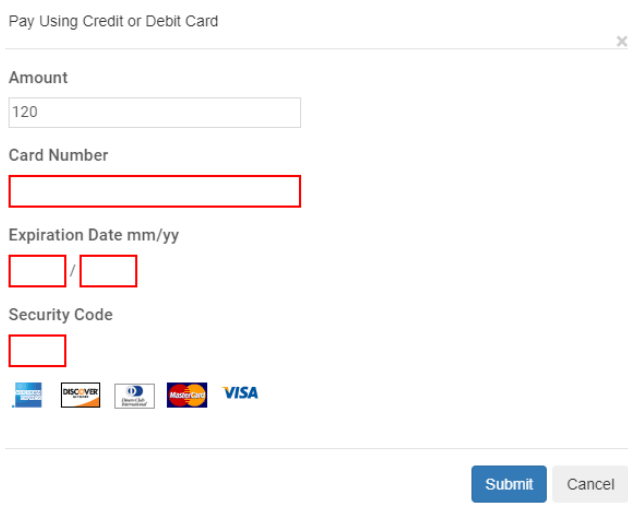
4. When you click OK, a new popup will appear prompting you to pay the fee. Select OK to open the invoice record and pay.



5. Click the blue Calculate Invoice button on the invoice to get the fees for your new permit.



6. Any and all outstanding fees against this property will be brought in and populated on the invoice. If this permit is late, you will see the late fee appear here.
7. Select a payment method from the Payment Method dropdown and click Pay Invoice to launch the payment for your invoice.
8. If you selected credit card, a credit card screen will appear to enter your payment info. If you selected ACH, a different screen will appear to enter your ACH payment info.

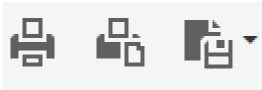


9. All fields are required in these payment windows. Enter in your payment information and click the blue Submit button to submit your payment.
10. If your payment is successful you will get a popup explaining the invoice has been marked as Paid and you invoice has now been paid. Click OK to exit that message.

2.5.7 Print Invoice

1. To print your invoice, you must still be on the invoice record from the steps above.
2. After successful payment, a blue Print Receipt button will appear on your invoice. Click this button to launch your receipt.

3. A new window will appear containing your receipt. You may save this directly to your system using the save button at the top of the new window. There is also an available print button to directly print from this page.



2.5.8 Permit Approval

1. After you have successfully entered in all information required on your permit and paid for your permit, your permit will be automatically approved. You will receive an email indicating approval of this permit.

2.6 Certificate of Compliance, as Seller

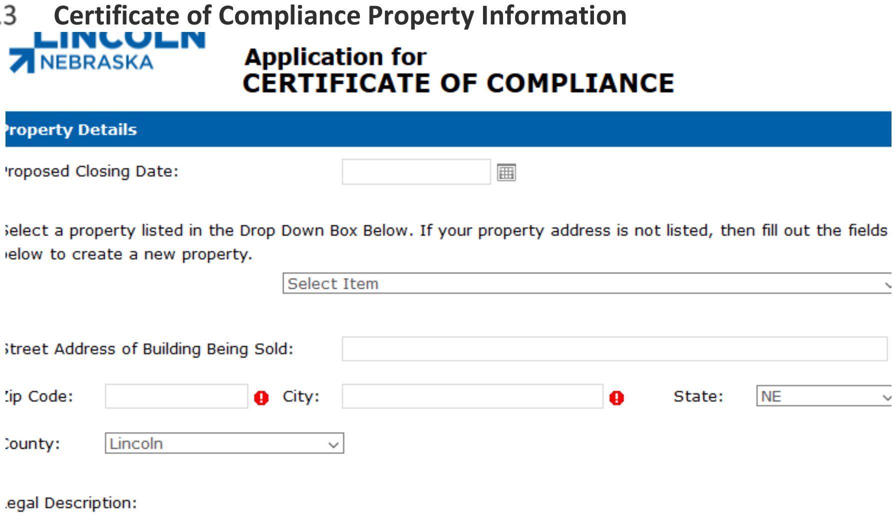
2.6.1 Summary

1. The Certificate of Compliance Record is the property's certificate of compliance that allows a property to transfer ownership.
2. The rental permit is marked "Open" automatically once the seller has submitted and paid for the CoC.
3. As the seller, it is your responsibility to accurately fill out the buyer's email to get them a notification to log into the system and complete their part of the CoC.

2.6.2 How to Start a Certificate of Compliance

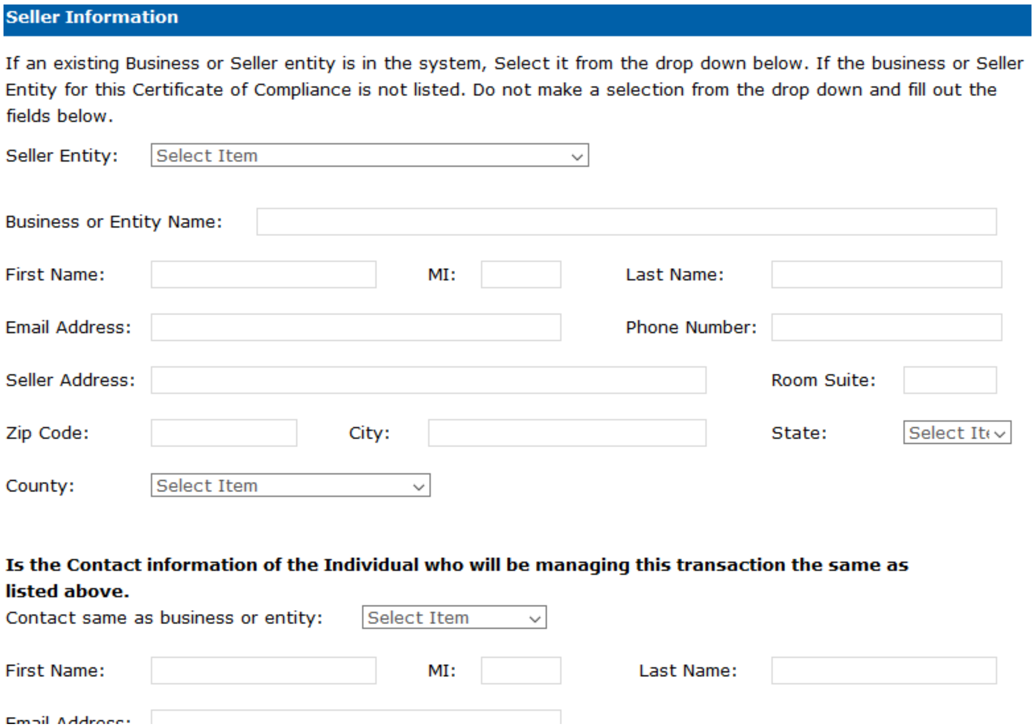
1. On your blue menu bar, scroll over New, Rentals, and click Certificate of Compliance.
2. This will open a new CoC in a new window.

2.6.3 Certificate of Compliance Property Information



1. The property you are seeking to submit for is likely already in the system. Check the dropdown list here to find the applicable property. Select it, and the fields will be filled out for you. If you do not see your property listed, you may fill in its information here.

2.6.4 Seller Information


Seller Information

If an existing Business or Seller entity is in the system, Select it from the drop down below. If the business or Seller Entity for this Certificate of Compliance is not listed. Do not make a selection from the drop down and fill out the fields below.

Seller Entity: Select Item

Business or Entity Name:

First Name: MI: Last Name:

Email Address: Phone Number:

Seller Address: Room Suite:

Zip Code: City: State: Select Ite

County: Select Item

Is the Contact information of the Individual who will be managing this transaction the same as listed above.

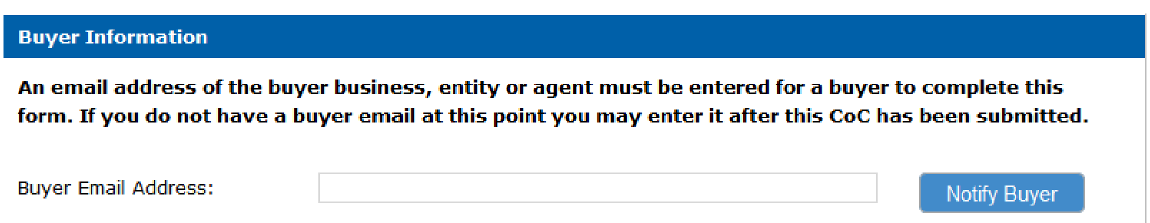
Contact same as business or entity: Select Item

First Name: MI: Last Name:

Email Address:

1. Scroll down under Legal Description to find the Seller Information.
2. This will be where you need to enter in your own information.
3. If you would like to select a business you already have in the system, use the Seller Entity dropdown list to find the correct business from this property and select it. Once selected, all applicable fields will be filled in for you.
4. If you need to add a business for this property, enter in new business information in these fields.
5. The Contact information is required for this CoC. Use the dropdown to indicate if the contact information for this CoC is the same as the business information, and it will prefill for you. If you select No from this dropdown, you must fill out all these fields.

2.6.5 Notify Buyer


Buyer Information

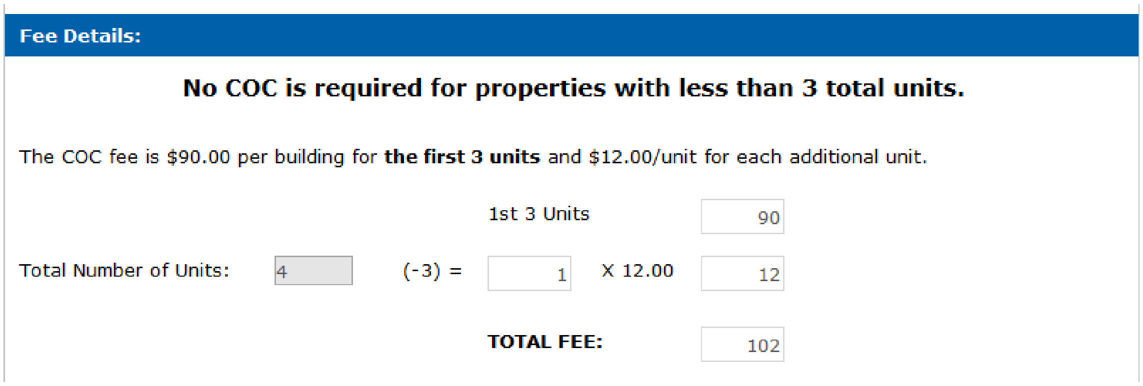
An email address of the buyer business, entity or agent must be entered for a buyer to complete this form. If you do not have a buyer email at this point you may enter it after this CoC has been submitted.

Buyer Email Address: Notify Buyer

1. Scroll under the Seller Information section to find the Buyer Information.
2. If you have a buyer's email address now, enter it in here and click the Notify Buyer button. This will send them an email telling them how to sign up for an account in the system and fill in their information on this CoC.

3. If you do not have a buyer's email address now, do not enter anything here. This is not required until you find a buyer.
4. If you need to add this buyer email in the future, you can return to this CoC by using your home portal tab "Rental Profile" subtab "Seller Certificate of Compliance."

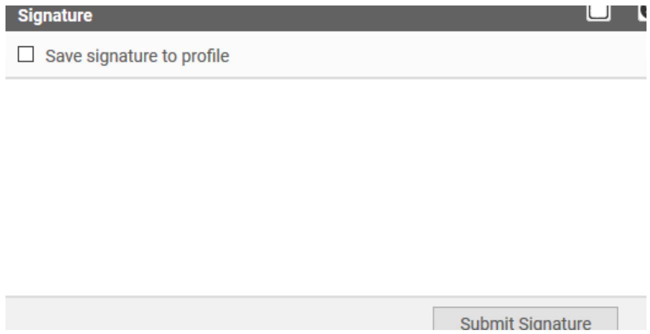
2.6.6 Fee Details



1. This is where you must enter in the total number of units belonging to this property.
2. Enter in your number of units in the Total Number of Units space and the fee will be calculated for you.

2.6.7 Submit and Pay

1. You must sign for this CoC. Click the black pen icon next to the Seller Signature Required field. This will bring up a signature pad for you to sign. Sign the pad and click Submit Signature. You can save your signature for later use in other records with the Save signature to profile checkbox in the top left corner. You can clear out the signature pad to re-sign using the checkbox in the top right corner. You can exit from this signature pad by using the black X icon in the top right corner.

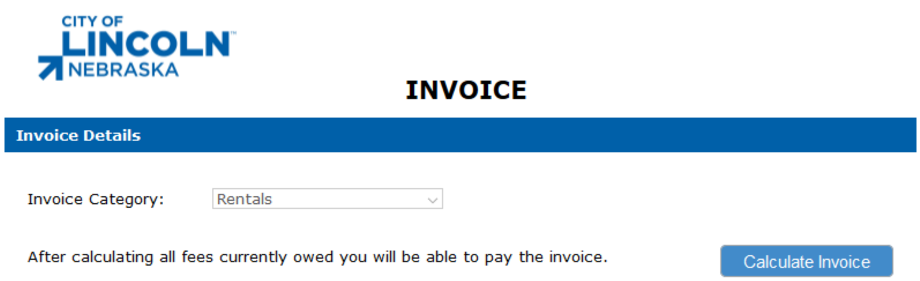


2. After all fields are entered and the record has been signed, click the blue Submit and Pay button. A message will appear confirming you want to submit this CoC and that fees will be generated upon submittal. Click OK to continue or Cancel to return.

3. After you click OK in the message window, you will see a new message window appear. Click OK to launch the Invoice record or Cancel to return. If you do not pay at this moment, you can find your fees due on your home portal tab “Rental Profile” subtab “Unpaid Fees.”

4. Your CoC will not be approved without payment being made.

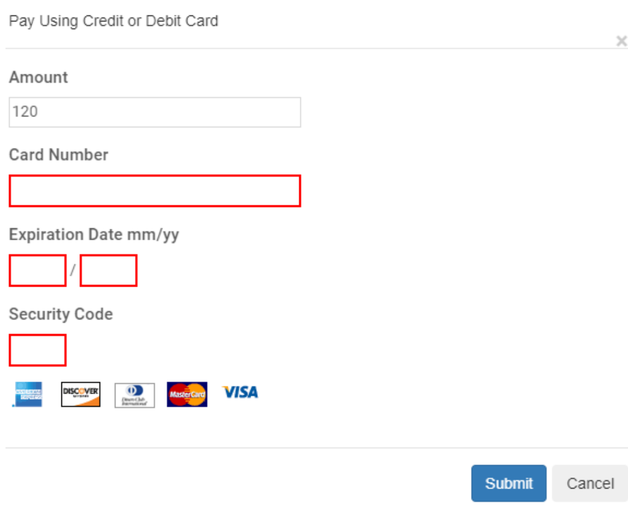
5. Once you click OK on the invoice message, you will be brough to the invoice record. Click the blue Calculate Invoice button on the invoice to get the fees for your new permit.



6. Any and all outstanding fees against this property will be brought in and populated on the invoice. If this permit is late, you will see the late fee appear here.

7. Select a payment method from the Payment Method dropdown and click Pay Invoice to launch the payment for your invoice.

8. If you selected credit card, a credit card screen will appear to enter your payment info. If you selected ACH, a different screen will appear to enter your ACH payment info.



9. All fields are required in these payment windows. Enter in your payment information and click the blue Submit button to submit your payment.

10. If your payment is successful you will get a popup explaining the invoice has been marked as Paid and you invoice has now been paid. Click OK to exit that message.

2.6.8 Print Invoice

1. To print your invoice, you must still be on the invoice record from the steps above.

2. After successful payment, a blue Print Receipt button will appear on your invoice. Click this button to launch your receipt.

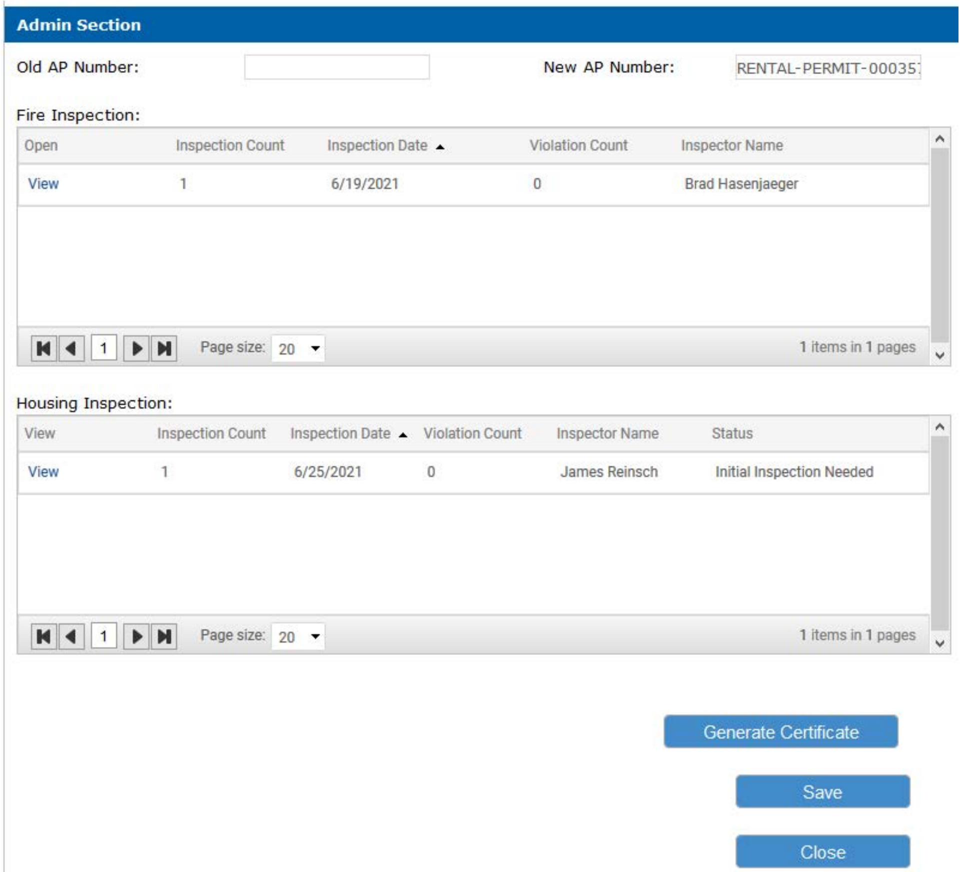
3. A new window will appear containing your receipt. You may save this directly to your system using the save button at the top of the new window. There is also an available print button to directly print from this page.

2.6.9 Certificate of Compliance Approval

1. After you submit your CoC the state will come do a Fire and Housing inspection against your property. These inspections must be clear of any violations in order to approve your CoC.

2. Your CoC cannot be approved without cleared inspection records and full payment being made.

2.6.10 Admin Section



1. In the Admin Section you will find the old permit number for this property, along with the new permit number for this property, if the CoC has been approved and a buyer has been found.
2. You may see the associated inspection records with this CoC. Click the blue "View" button next to the inspection record you wish to review. A CoC may have multiple inspections in both tables.
3. The Generate Certificate button will be visible only on approved CoCs. Click this button to generate the PDF of the CoC.
4. Use the "Save" button to save the record and the "Close" button to close out of the record.

2.7 Certificate of Compliance, as Buyer

2.7.1 Summary

1. The Certificate of Compliance Record is the property's certificate of compliance that allows a property to transfer ownership.
2. The rental permit is marked "Open" automatically once the seller has submitted and paid for the CoC.

3. As the buyer, it is your responsibility to accurately fill out your information on the outstanding CoC.
4. You must ensure that the Seller has entered your email address, that you use in this system, in the Notify Buyer field so that it will appear on your home screen.

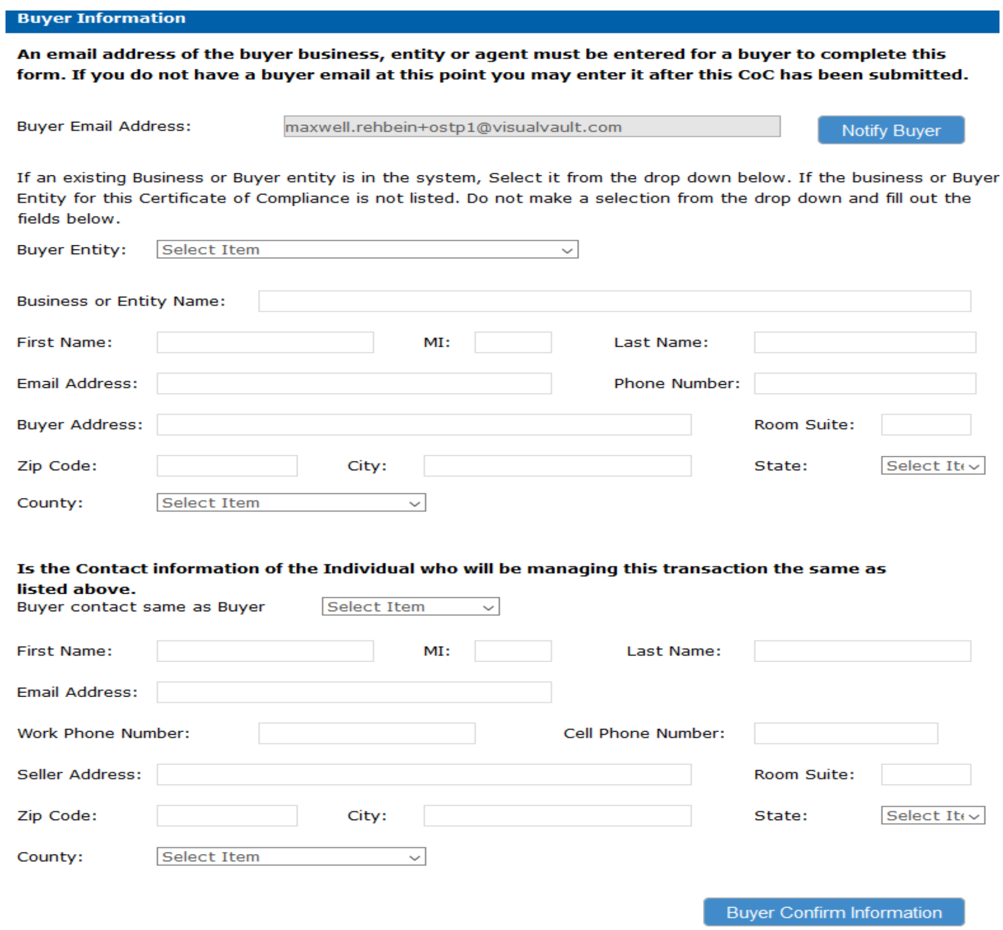
2.7.2 Open Certificate of Compliance

1. To open a CoC as a buyer, on your home page under “Rentals Profile” tab, select subtab “Buyer Certificate of Compliance.”

2. Find the CoC you would like to complete, and click the blue Continue Certificate of Compliance button to open that record.

2.7.3 Buyer Information

1. When the CoC opens, scroll down to the “Buyer Information” header to find the fields you need to enter.



2. You can select a business you already have in the system by using the dropdown Buyer Entity. Select the business you want, and the information will be filled in for you.

3. If you would like to own this under a new business, enter new business information here.

4. Contact Information is required for this CoC. Use the dropdown to select Yes or No to fill in the information on the contact fields. If you choose Yes, the fields will populate with the information from above. If you choose No, you must manually enter new contact information here.

5. After you have entered in all required information, click the blue Buyer Confirm Information button. You will get a message asking you to confirm your info, click OK to continue or Cancel to stop.

6. After a successful completion of assigning your info to this CoC, you will see a table showing your applicable business information appear. You have completed your portion of the CoC now.

2.7.4 Certificate of Compliance Approval

1. After the city has completed the required Fire and Housing inspections with no violations found, and after the seller has paid their applicable fees, the CoC can be approved by the city's Chief Housing Inspector. You will be notified by email once the CoC has been approved.

2. After the CoC has been approved, you will have a rental permit to complete to license this property under your name. This can be found on the home screen under your "Rentals Profile" tab and the subtab "Permits to Complete."

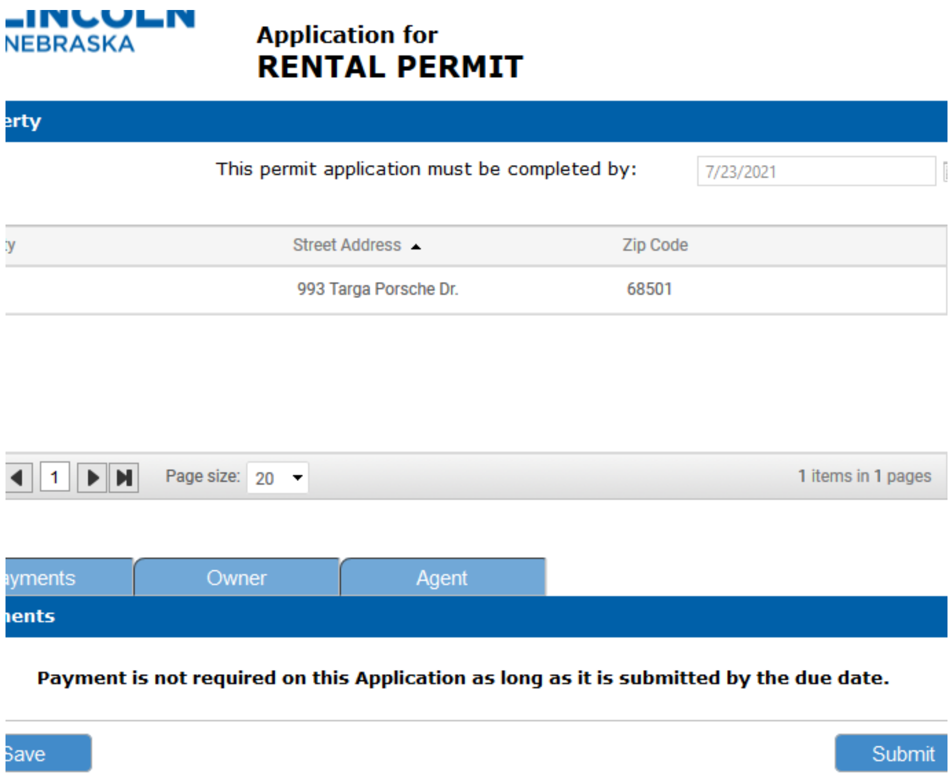
2.8 Complete Rental Permit After CoC Approval

2.8.1 Summary

1. Once the CoC that you are buying has been approved, you will be notified by email. You will also be directed to log in and complete your new rental permit for this property.

2. You can find this new permit on the home screen under your "Rentals Profile" tab and the subtab "Permits to Complete." Find the permit you want to complete and click the blue Open Permit button to launch the new permit.

2.8.2 Submit Permit



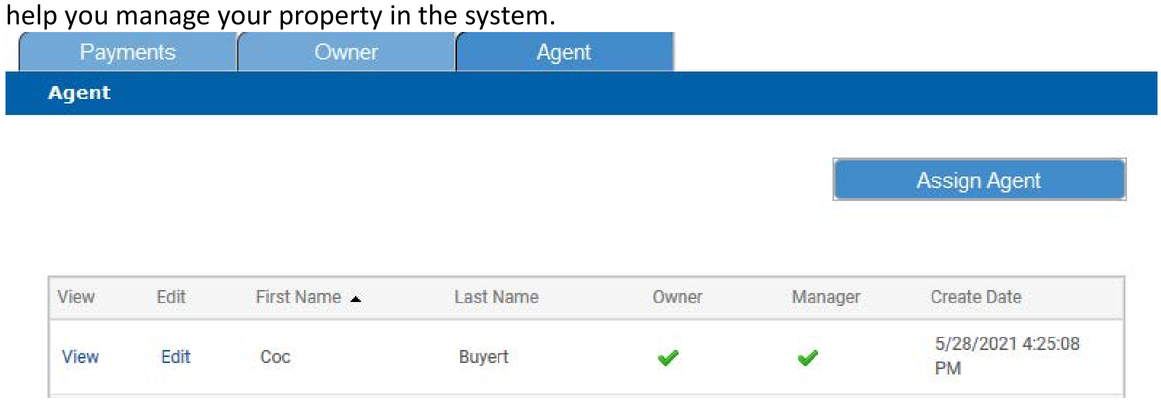
1. After you open the permit, you will see a message indicating that no payment is required.

2. Click the blue Submit button to submit your permit.

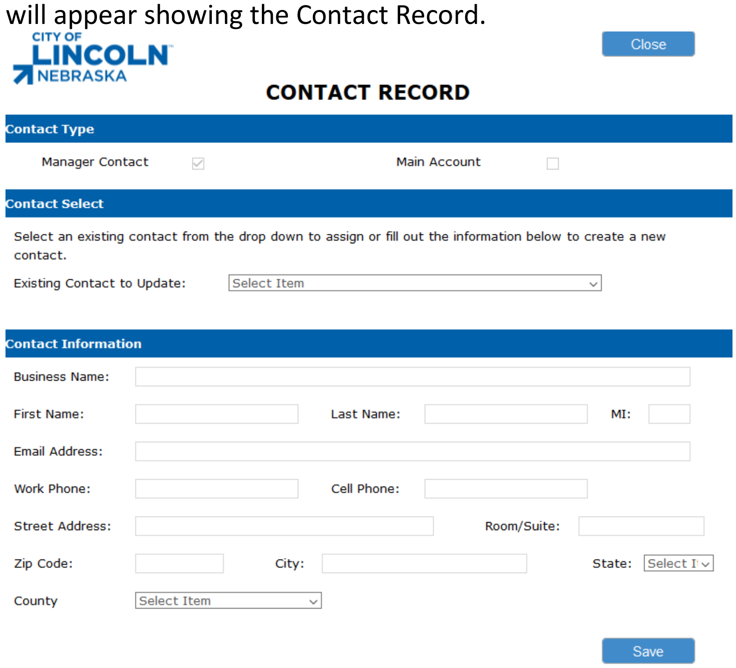
3. Your permit will be automatically approved upon submission. You will receive an email notification relating to this new permit. No permit is generated or needed. You have completed this process.

2.8.3 Assign Agent (Optional)

1. On this permit you will find an Agent tab on your screen. Agents are individuals who help you manage your property in the system.



2. If you would like to designate an agent for this property, click the blue Assign Agent button. A popup will appear asking you to confirm creating an agent account. Click the OK button to continue or Cancel to return. If you clicked OK to continue, a new window will appear showing the Contact Record.


CITY OF LINCOLN NEBRASKA

Close

CONTACT RECORD

Contact Type

Manager Contact ☑ Main Account ☐

Contact Select

Select an existing contact from the drop down to assign or fill out the information below to create a new contact.

Existing Contact to Update: Select Item

Contact Information

Business Name:

First Name: Last Name: MI:

Email Address:

Work Phone: Cell Phone:

Street Address: Room/Suite:

Zip Code: City: State: Select I

County Select Item

Save

3. All fields are required on this Contact Record, except for Business Name.

4. If you would like to select an agent you have from another property to be added here, select it from the Existing Contact to Update dropdown.

5. Once you have entered in all required fields, click the blue Save button. This will save the individual to your property and permit. Close out of the contact record to return to your permit.

2.9 Complete Renewal Permit

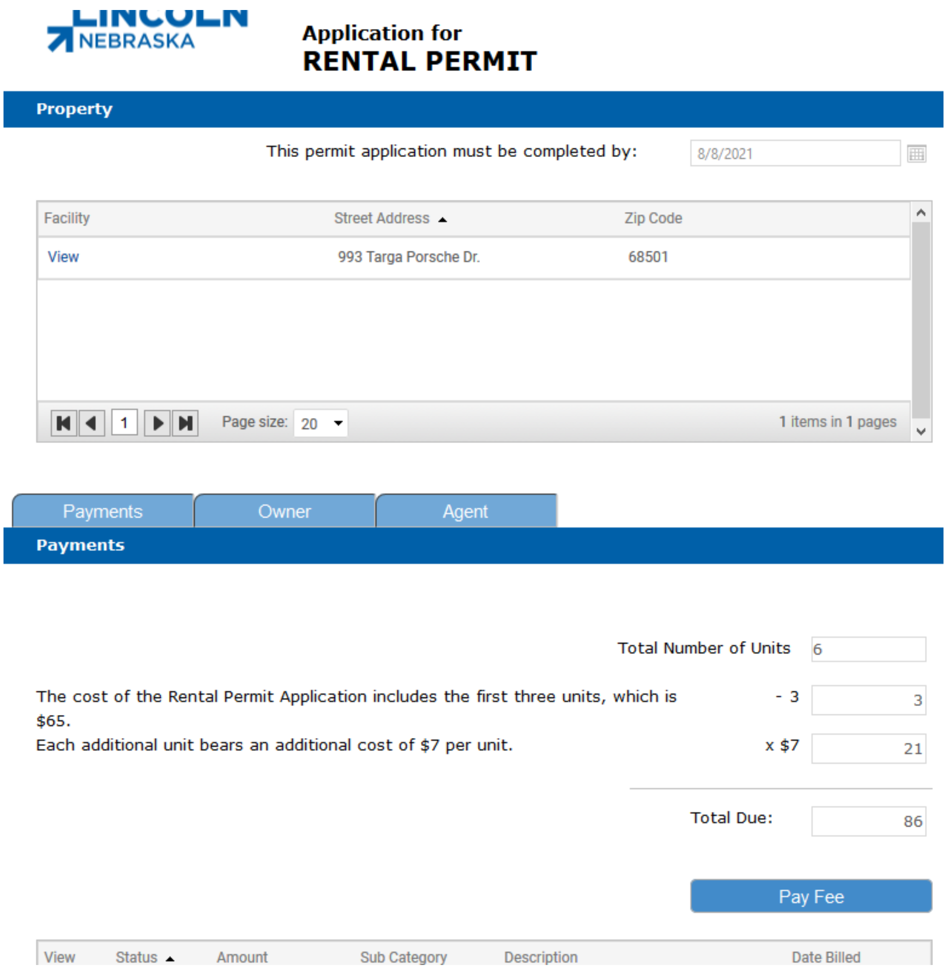
2.9.1 Summary

30 days before your rental permit expires, you will receive an email notification to login and renew your rental permit. You must renew this permit within 30 days of its expiration, or a late fee will be applied.

2.9.2 Open the Renewal Permit

1. On your home screen under Rentals Profile tab, click the Permits to Complete subtab. This will show you all permits associated to your account that need to be completed. Find the permit you want to complete and click the blue Open Permit button next to it. This will launch the renewal permit.

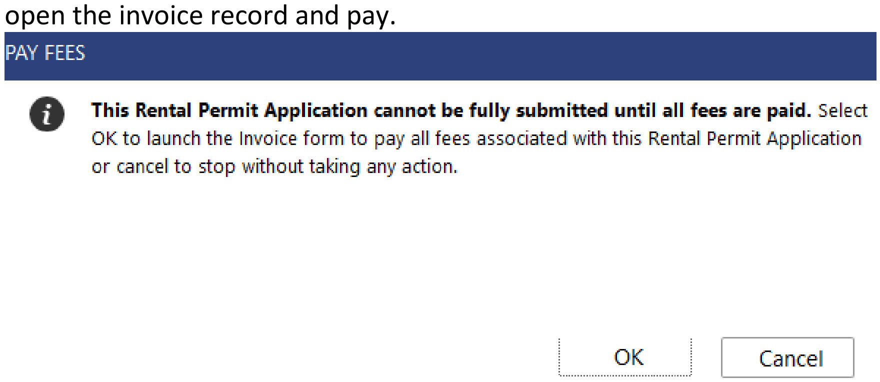
2.9.3 Confirm information and Pay Fee



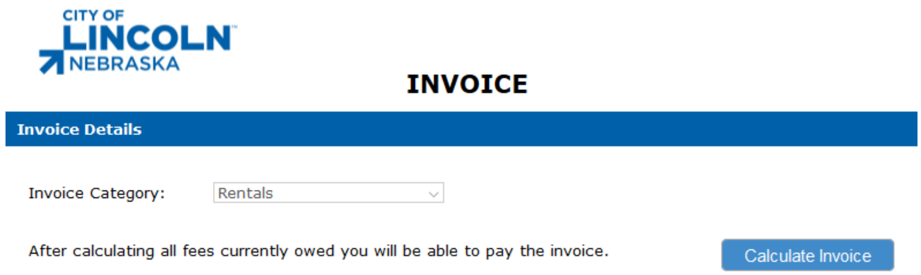
1. The total number of units will have been prefilled for you. If the number of units has changed since last year, please update the value now.

2. Click the Pay Fee button to pay this permit renewal. You will get a confirmation message to submit this permit, click OK to continue or cancel to cancel.

3. When you click OK, a new popup will appear prompting you to pay the fee. Select OK to open the invoice record and pay.



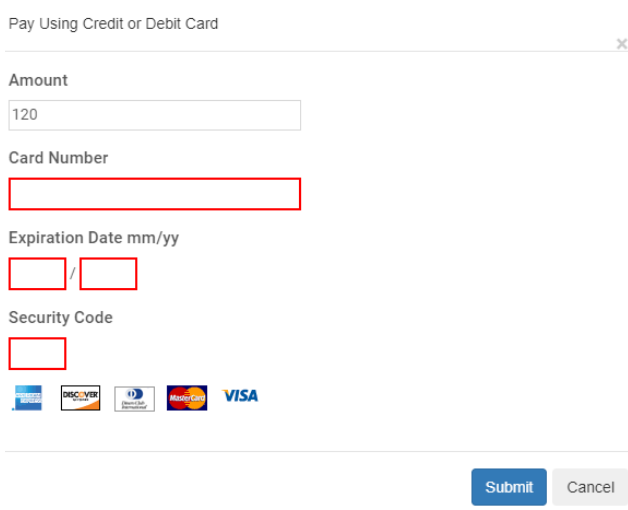
4. Click the blue Calculate Invoice button on the invoice to get the fees for your new permit.



5. Any and all outstanding fees against this property will be brought in and populated on the invoice. If this permit is late, you will see the late fee appear here.

6. Select a payment method from the Payment Method dropdown and click Pay Invoice to launch the payment for your invoice.

7. If you selected credit card, a credit card screen will appear to enter your payment info. If you selected ACH, a different screen will appear to enter your ACH payment info.



8. All fields are required in these payment windows. Enter in your payment information and click the blue Submit button to submit your payment.

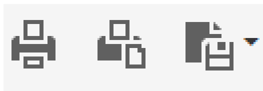
9. If your payment is successful you will get a popup explaining the invoice has been marked as Paid and you invoice has now been paid. Click OK to exit that message.

2.9.4 Print Invoice

1. To print your invoice, you must still be on the invoice record from the steps above.

2. After successful payment, a blue Print Receipt button will appear on your invoice. Click this button to launch your receipt.

3. A new window will appear containing your receipt. You may save this directly to your system using the save button at the top of the new window. There is also an available print button to directly print from this page.



2.9.5 Permit Approval

1. After you have successfully entered in all information required on your permit and paid for your permit, your permit will be automatically approved. You will receive an email indicating approval of this permit.

2.10 Rental Property Record

2.10.1 Summary

1. The Rental Property Record holds all information for a property. These records hold all related inspections, any associated fees, and business information.

2. To get to the Rental Property Record, go to the “My Rental Properties” tab on your home page. Find the Property you would like to view and click the “View Property” button next to that information to open it.

2.10.2 Property Address

NEBRASKA

RENTAL PROPERTY RECORD

Property Address

Street Address: 012 new street road

City: Lincoln

State: NE

Zip Code: 68508

County: Lancaster

Legal Description:

Annual Inspection Timeline: Select Item

Reason for Inspection Timeline:

1. Here you will find the address and legal description for the selected property.
2. You will also see the annual inspection timeline this property is under and the reason for that selection.

2.10.3 Inspection Tab

Inspections | License Applications | Certificate of Compliance | Fees | Admin

Inspections

These are all Inspections associated with this property.

View	Inspection Count	Inspection Date ▲	Violation Count	Inspector Name	Status
View	1	6/2/2021	0	James Reinsch	Completed and Approved
View	1	6/19/2021	0	Dennis Drbal	Completed and Approved

1. Here is where you can find all related inspections for this property. Click the blue View button to open an Inspection to review.

2.10.4 License Applications Tab

Inspections | License Applications | Certificate of Compliance | Fees | Admin

License Applications

These are all the License Applications related to this property.

Edit	Form ID	Status	Property ID
Edit	RENTAL-PERMIT-000322	Expired	RENTAL-PROPERTY-000120
Edit	RENTAL-PERMIT-000325	Approved	RENTAL-PROPERTY-000120

1. This is where you can find all related rental permits for the property. Click the blue edit button to view.

2.10.5 Certificate of Compliance Tab

Inspections | License Applications | Certificate of Compliance

Certificate of Compliance

This is the Certificate of Compliance associated to this property.

Edit	Form ID	Status	Expiration Dat
Edit	RENTAL-COC-APP-00000171	Approved	8/26/2021

1. This is where you can find all related CoCs to the property. Click the blue edit button to view.

2.10.6 Fees Tab

Inspections | License Applications | Certificate of Compliance | Fees | Admin

Fees Assessed

You may pay all fees due or view individual fees for your property below.

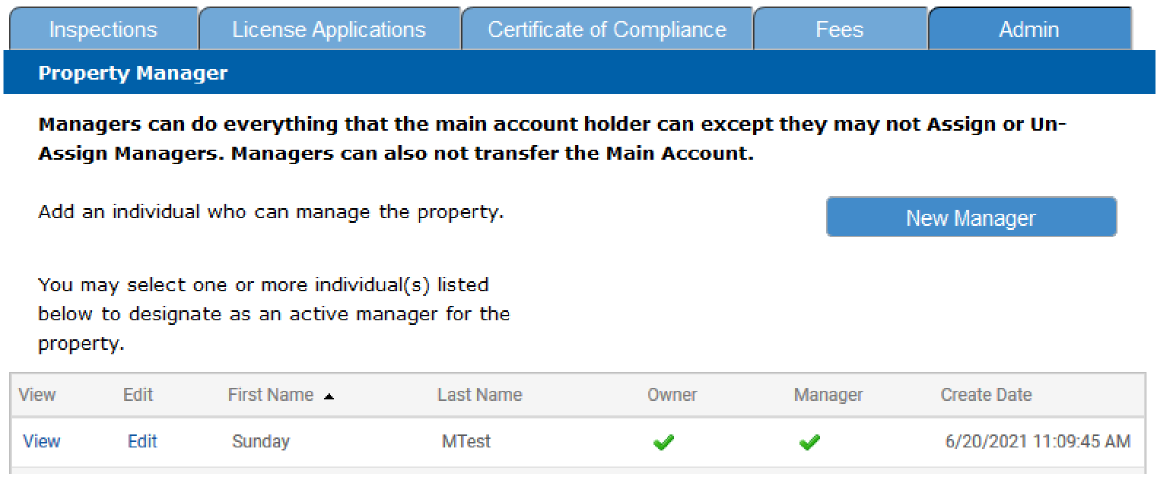
Pay All Fees

View	Status ▲	Amount	Sub Category	Description	Date Billed
			No records to display.		

1. This is where all property related fees may be found. Click the blue View button to open an invoice line item for review.

2. You can pay all fees associate to this property using the blue Pay All Fees button.

2.10.7 Admin Tab

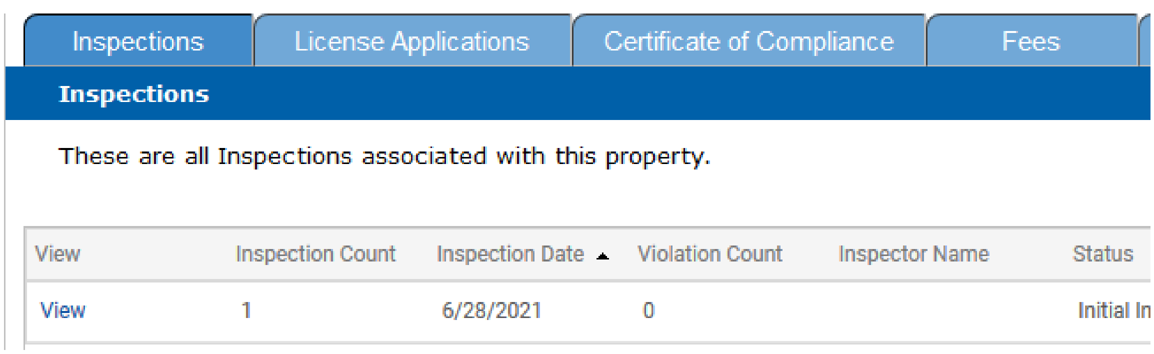


1. Under the Property Manager header, you will find all individuals associated to the Rental Property. New Managers can be created with the New Manager button. You can assign or unassign individuals to this business by using the Assign or Un-Assign blue buttons.

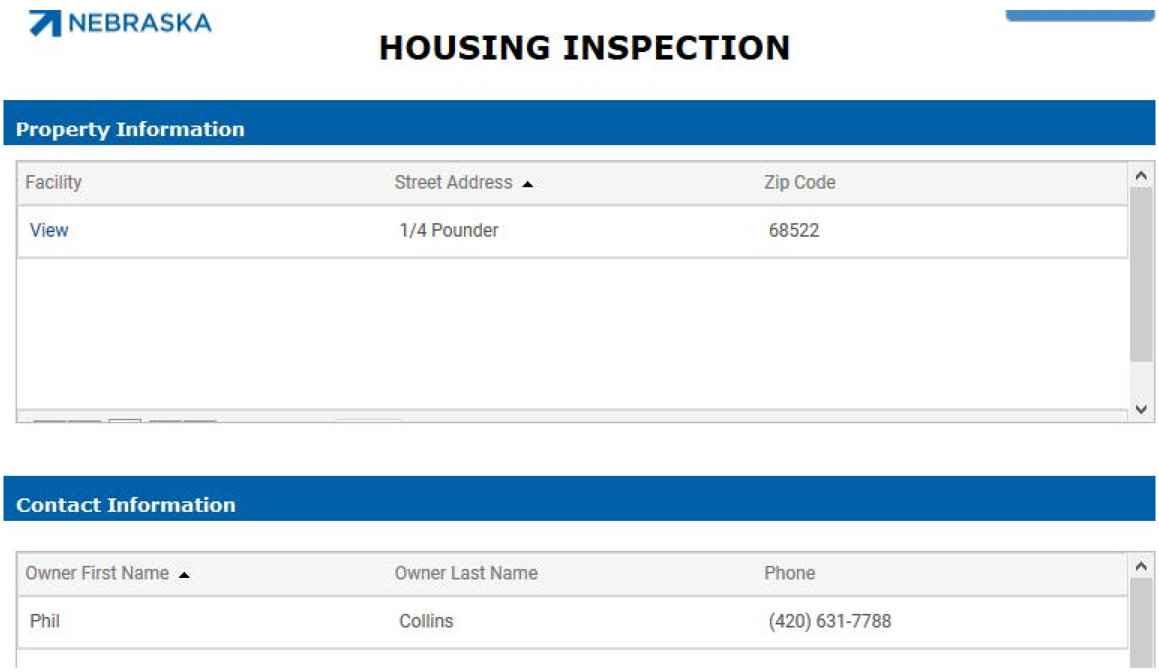
2.11 Housing Inspections

2.11.1 Summary

1. To find all housing inspections related to your property, navigate to the portal tab "My Rental Properties" from your home screen. Click the View Property button next to the property you would like to view. In the property record, click the blue view button next to the inspection you would like to open. This will launch the inspection record in a new window.



2.11.2 Property and Contact Information



NEBRASKA

HOUSING INSPECTION

Property Information

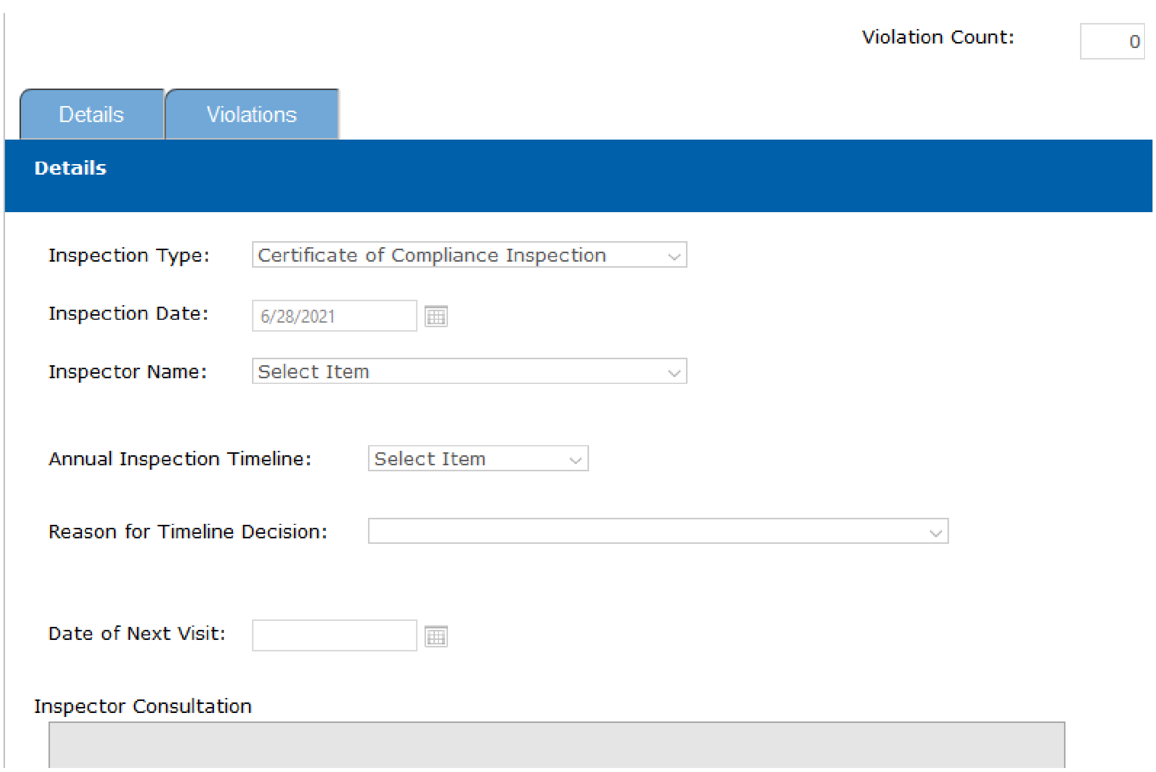
Facility	Street Address ▲	Zip Code
View	1/4 Pounder	68522

Contact Information

Owner First Name ▲	Owner Last Name	Phone
Phil	Collins	(420) 631-7788

1. Related Property and Contact information will be found at the top of the record. Click the View button to open information about the property.

2.11.3 Details Tab



Violation Count: 0

Details | Violations

Details

Inspection Type: Certificate of Compliance Inspection

Inspection Date: 6/28/2021

Inspector Name: Select Item

Annual Inspection Timeline: Select Item

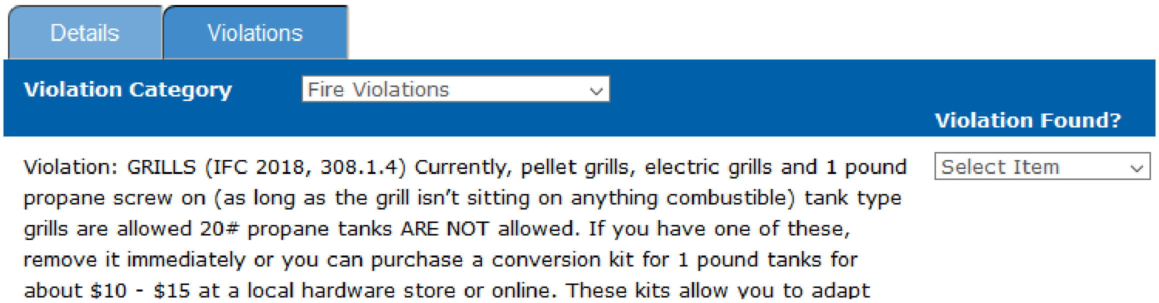
Reason for Timeline Decision:

Date of Next Visit:

Inspector Consultation

1. Here you will see what type of Inspection was conducted, the date of inspection, total violations, and by whom.
2. The Inspector Consultation field holds notes that only the inspector has left you.

2.11.4 Violations Tab



1. In the Violations tab you will find the Violation Checklist. These are all possible violations to be found on this record for the property.

2. Violations can be Yes, No, or Select Item. No and Select Item do not count towards a violation. Yes will increase the violation count by 1.

3. You can search all violations lists to find the Yes values and the action required to correct that violation. You would have also received a letter and email containing this same information.

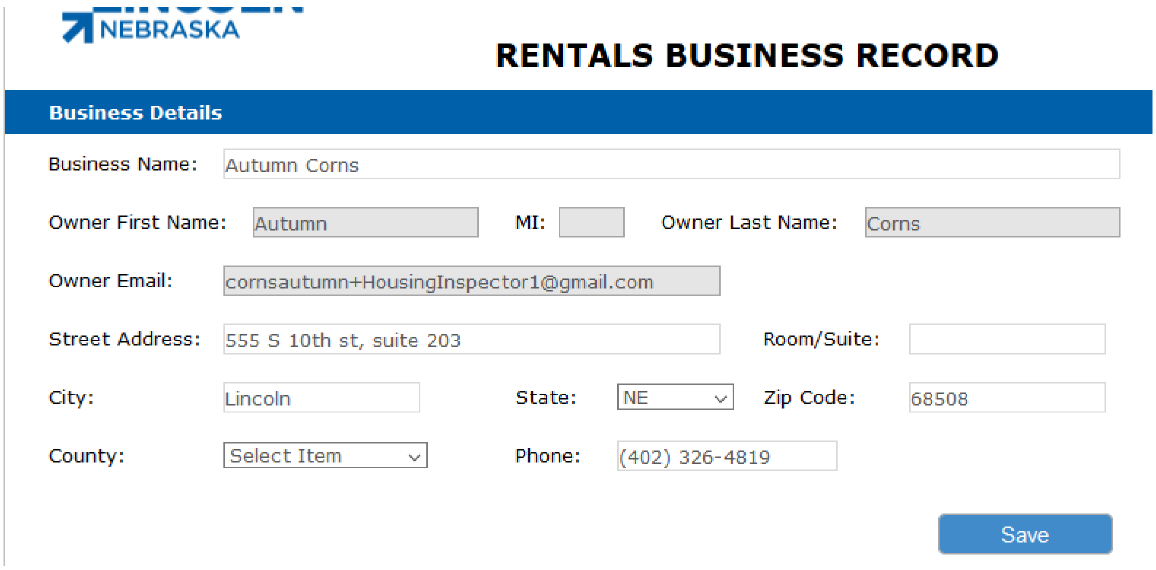
2.12 Rental Business Record

2.12.1 Summary

1. The Rental Business Record holds all information for a business. These records hold all related rental properties, any associated fees, and business information.

2. To get to the Rental Business Record, go to the "Rental Profile" tab on your home page, click the subtab My Businesses. Click the blue Open Business Record button next to the business you want to view.

2.12.2 Business Details



NEBRASKA

RENTALS BUSINESS RECORD

Business Details

Business Name: Autumn Corns

Owner First Name: Autumn MI: Owner Last Name: Corns

Owner Email: cornsautumn+HousingInspector1@gmail.com

Street Address: 555 S 10th st, suite 203 Room/Suite:

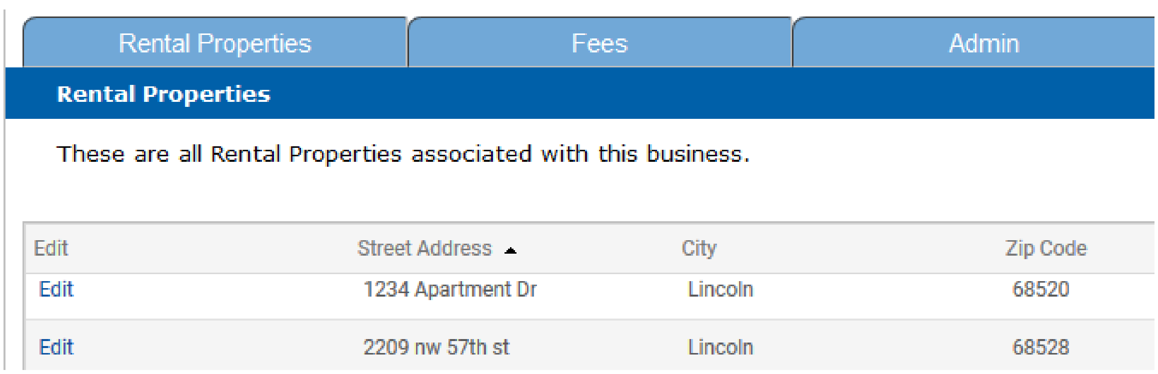
City: Lincoln State: NE Zip Code: 68508

County: Select Item Phone: (402) 326-4819

Save

1. Business information can be found in the Business Details section. This information can be changed, once changed click the blue Save button to keep these changes in the system.

2.12.3 Rental Properties Tab



Rental Properties | Fees | Admin

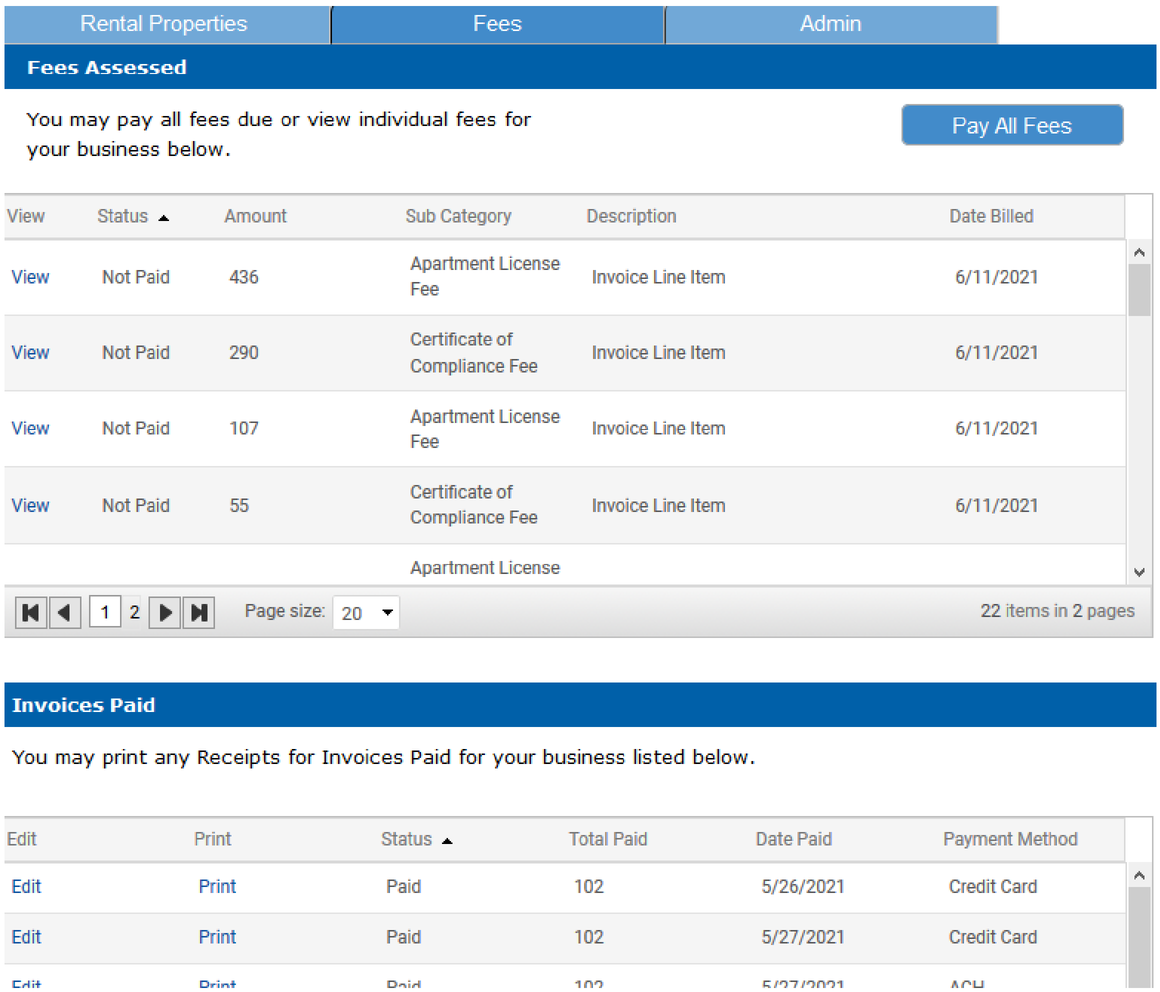
Rental Properties

These are all Rental Properties associated with this business.

Edit	Street Address ▲	City	Zip Code
Edit	1234 Apartment Dr	Lincoln	68520
Edit	2209 nw 57th st	Lincoln	68528

1. Here is where you will find the properties owned by this business. Click the blue edit button to open the property you want to view.

2.12.4 Fees Tab

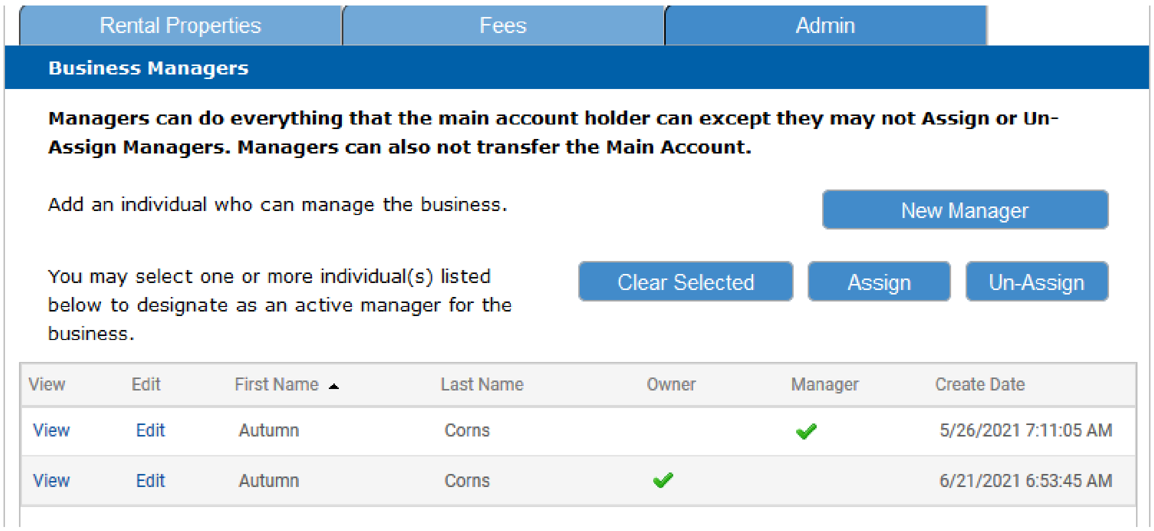


1. Under Fees Assessed you will find all related invoice line items associated to this business. To open one, click the blue View button.

2. Under Invoices Paid you will find all the invoices that have been paid by this business. To view the invoice, click the blue Edit button. To print the receipt from the invoice, click the blue print button.

3. To pay any outstanding fees against this business, click the blue Pay All fees button.

2.12.5 Admin Tab


Rental Properties | Fees | Admin

Business Managers

Managers can do everything that the main account holder can except they may not Assign or Un-Assign Managers. Managers can also not transfer the Main Account.

Add an individual who can manage the business. New Manager

You may select one or more individual(s) listed below to designate as an active manager for the business. Clear Selected | Assign | Un-Assign

View	Edit	First Name	Last Name	Owner	Manager	Create Date
View	Edit	Autumn	Corns		✓	5/26/2021 7:11:05 AM
View	Edit	Autumn	Corns	✓		6/21/2021 6:53:45 AM

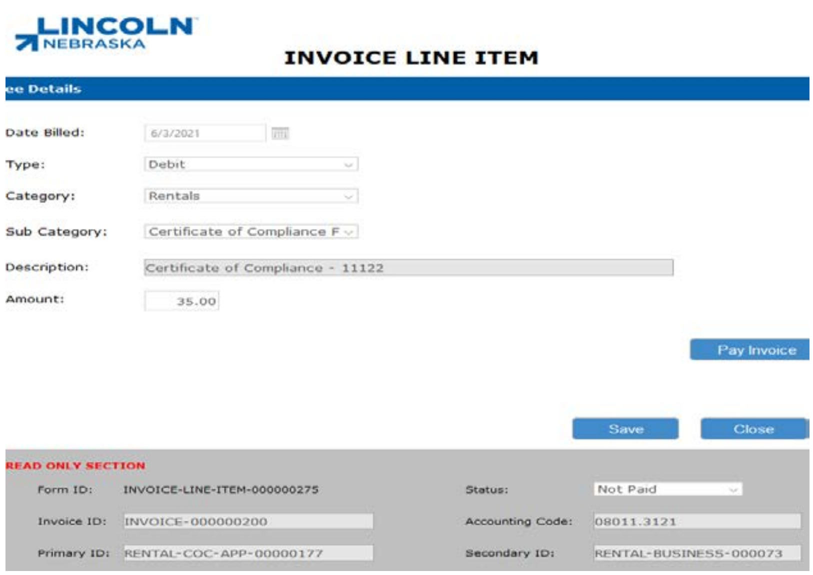
1. Here you will find all individuals associated to the Rental Business.
2. New Managers can be created with the New Manager button.
3. You can assign or unassign individuals to this business by using the Assign or Un-Assign blue buttons.

2.13 Rental Fees

2.13.1 Summary

You can view all unpaid rental property fees in one area on your home screen. This is found on the “Rentals Profile” tab from your home screen under the subtab of Unpaid fees.

To Open an invoice item for payment, click the blue Open button next to the item you want to view. Click the Pay Invoice button to pay that item.


LINCOLN NEBRASKA

INVOICE LINE ITEM

ee Details

Date Billed: 6/3/2021

Type: Debit

Category: Rentals

Sub Category: Certificate of Compliance F

Description: Certificate of Compliance - 11122

Amount: 35.00

Pay Invoice

Save | Close

READ ONLY SECTION

Form ID: INVOICE-LINE-ITEM-000000275 | Status: Not Paid

Invoice ID: INVOICE-000000200 | Accounting Code: 08011.3121

Primary ID: RENTAL-COC-APP-00000177 | Secondary ID: RENTAL-BUSINESS-000073

2.13.2 Print Invoices

You can print invoices directly from your home page under the Rental Billing Dashboard. You can also print invoices specific to properties and businesses from the property or business record.

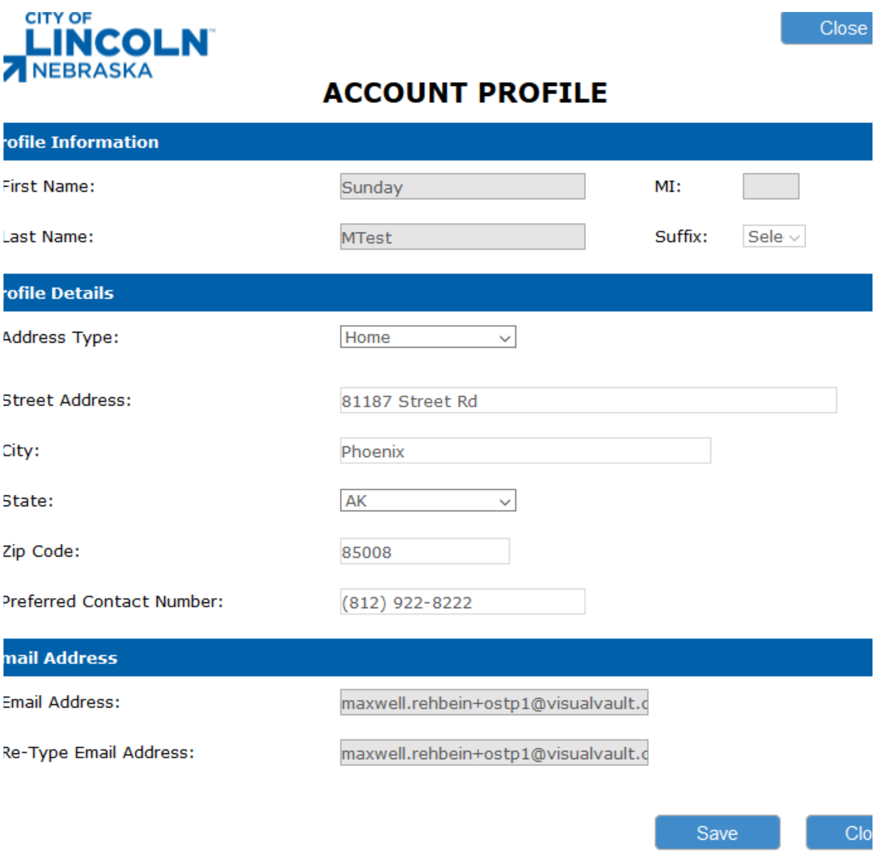
1. From your home page, go to Rental Billing Dashboard. You will see a grid displaying "Invoices." Find the invoice you want to print and click the blue "Open Invoice" button.

2. Your invoice will open, and you can print the receipt using the blue Print Receipt button.

2.14 Edit Profile Information

2.14.1 Summary

To edit your profile information, click the "Open Profile" button on your Rentals Profile home page.



1. You can edit any fields that are not grey.

2. Click the blue save button to save your changes. Click the blue Close button to close out of this record.

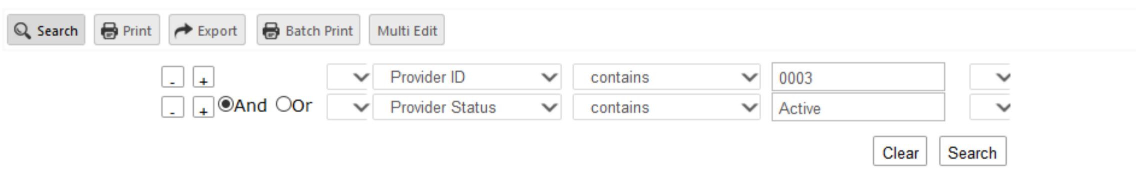
3. If you would like to make changes to your account in the grey areas, please contact the city for assistance.

3 Global Navigation/Functionality

This section will outline "global" functionality that will be available to all users.

3.1 Searching

As you work in VisualVault, you will need to look for information to answer questions, resolve issues, and conduct research. Searching will be a key part of regular tasks that you complete in the system. On every screen, there is a **Search** button in the upper left-hand corner of the screen. When you select the **Search** button the following search fields appear at the top of the screen:



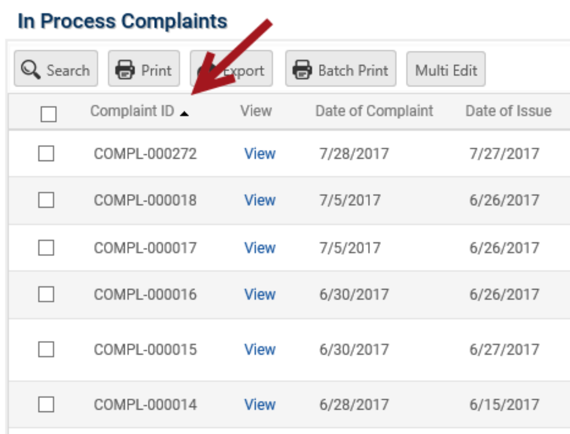
To conduct a search:

1. In the first wide field, select which field you want to search for information.
2. In the middle field, select the matching condition.
3. In the last wide field, enter the search criteria by keying in text or selecting a date.
4. If you want to search on multiple sets of criteria, select the + sign to the left of the search fields and add your criteria.
5. Use AND or OR indicators at the left to combine or separate criteria that you are searching on. In the example image above, the Provider ID contains 0003 AND Provider Status contains Active. Both conditions need to be true in a record of information for the search to show those items.
6. You may select parenthesis in the far left or right drop-down lists to combine criteria together into a group.
7. Once the criteria are configured, select **Search**.

A search is only in the context of the screen where the search is occurring. The list below will change to reflect all records that match your search.

3.2 Sort or Changing Order of Lists

When you view a list of information, there is a default order that the data is sorted. At the top of the data, the column that has a black arrow pointing up or down will indicate which column is the default sort order. As you interact with the lists of data, you can change the order of the list by selecting the label at the top of the column. Selecting the column multiple times will toggle the order of the data from ascending to descending order and back. Changing the order of the data can help you to consume the data more effectively.

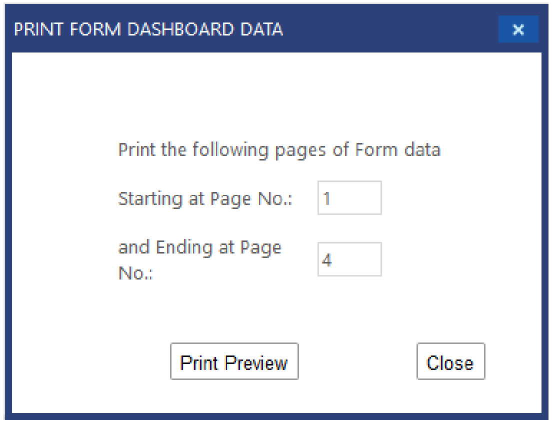


3.3 Print and Batch Print

When looking at a list of information in VisualVault, any user may print that information in two ways. The first is by using the **Print** button. When Print is selected, the data that shows in the list will be printed as it shows in the list. The second mechanism is the **Batch Print** button. Batch Print will print the selected records as they would appear if you had opened the record. The following are instructions on how to conduct both types of printing:

Print

1. When looking at a List, select the **Print** button.
2. Enter the pages that you want to print.



3. Select **Print Preview**.

4. Screen will appear in the browser with all the data to be printed.

5. Use the print mechanism in the browser to print the results.

Batch Print

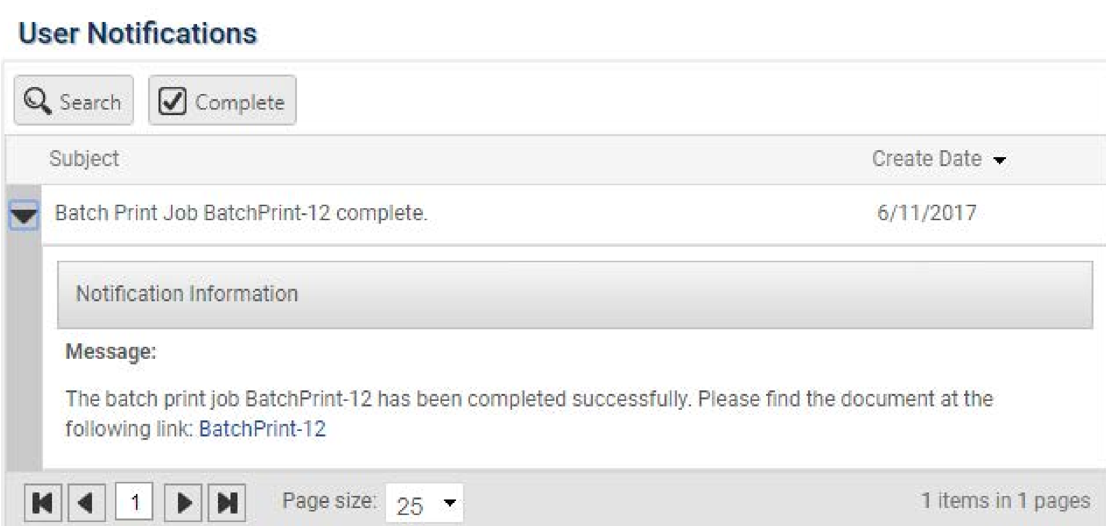
1. Select the items you want to print from the list.

2. Select **Batch Print**.

3. Select **OK**.

4. The job is queued so that VisualVault may generate a PDF with each of the selected items in the PDF. The job may take some time depending on the size and number of forms printed.

5. Once the jobs are complete, go to the **Home** page and view the **Notifications** panel.

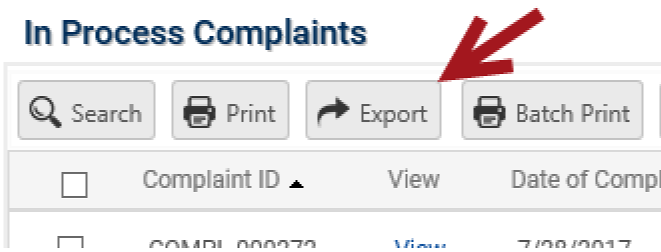


6. Expand the Notification and select the link to download the PDF.

3.4 Export

When viewing any list, data may be exported to Excel, Word, or XML. To export data from a list, complete the following steps:

1. Select the **Export** button at the top of any list.



2. Select **Export All Pages** or **Export Selected Pages**
3. Select the pages that you want to export if you have selected Export Selected Pages.
4. Select the icon that represents the type of export you want to complete.
5. Excel or Word will open to show the data exported to that type of document.

3.5 Action Buttons

Throughout VisualVault, various buttons will be available to upload documents, change a status, begin a new request, etc. Most times, the buttons are only visible during the timeframe that they should be selected. At other times, the buttons may be active or inactive. Active buttons have white text -- inactive buttons have gray text. Some buttons are intended for certain people to select, like a director or supervisor to facilitate approvals for example. Sometimes these buttons are visible to everyone; sometimes they are not. If you select a button that you are not authorized to select, a message will appear indicating that you do not have permission to complete the workflow.

3.6 Screen Tabs

As you interact with any record, various tabs along the top of the record will be visible depending on the process and your permissions to the process. This section will document the purpose of each tab.

3.7 Related Documents

At various times in the records being saved inside of VisualVault, users will have the ability to upload documents or electronic files into the system. When those documents are uploaded, a relationship is established with the record. When this tab is selected, it shows all documents that have been uploaded and associated with the record. You will only see the documents that you have permission to view.

3.8 Related Forms

The records created in your solution are created using VisualVault Intelligent Forms (iForms). When one record is created from another record, the two are related to each other. When the **Related Forms** tab is visible, you may view the relationships that have been created between the current record and other records in VisualVault. These relationships help users find information quickly and are intrinsic to many of the processes implemented in VisualVault.

3.9 Change Log

As users edit any record, a new revision is created each time the **Edit** link is selected. The final saved changes for each revision made while editing a record are recorded. The change log displays a revision, the person who edited the record, and the date when the record was changed. Under each revision, the fields that changed show the previous value and the new value that was entered.

3.10 Revision

The Revision tab supports the mechanisms associated with editing a record. When a user selects the **Revision** tab, they will see a snapshot of each record and how it looked at each point that it was edited. Users with appropriate permissions may go back in time to see how the record looked.

3.11 History

The **History** tab is the audit trail of actions or events taken against a record over time. Items recorded are events, for example, when someone edits or views a record, completes a workflow, uploads a document, fills in a related record, etc.

3.12 Workflow

Some of the records within VisualVault need to pass through an approval process. This process is managed by a workflow. When viewing this tab, users will be able to see the current status of the workflow and view the persons who were involved in the workflow up to that point in time.

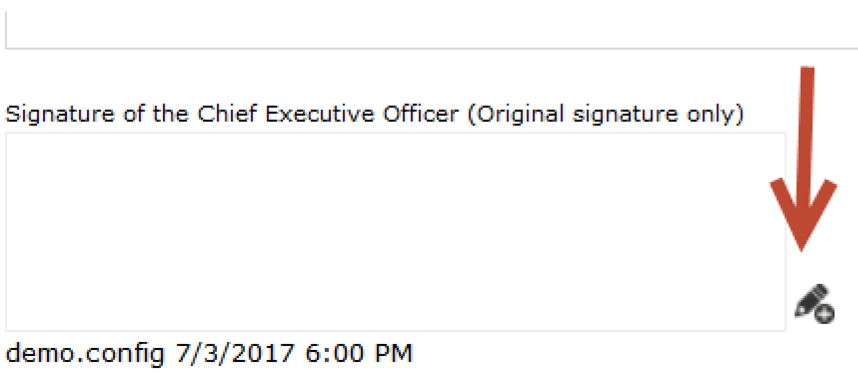
3.13 Record Context Menus

Throughout the VisualVault system, you may right click on any record and receive a menu of possible actions. The actions are simple: **View**, **Edit,** or **Print**. Some users may only be able to edit records for a certain time, so they will see **View** and **Print** as the only options. If you are able to edit a record, you will see an **Edit**or **Change** link in the list next to the items that you have permission to change. If you do not see an Edit link, try right clicking on a record. If you have permissions to edit a record at any time, you will see an Edit link in the context menu.

3.14 Signatures

At various circumstances in VisualVault, management or directors will need to electronically sign various requests before they are approved. Users may sign the electronic signature every time if they wish. Or they may store a signature and reuse that saved signature. To create and store a signature, proceed as follows:

1. Select the **Pencil** next to the signature area of the form. Electronically sign in the canvas window that appears.



2. Check the **Save signature to profile** checkbox.

NOTE: This button allows the signature to be cleared so a better-quality signature may be entered.

3. Select **Submit Signature** to keep the desired signature.

Users may repeat the process at any time to update signature. Once the signature is saved, a second button will appear at the bottom of the electronic signature image. This will allow the director to use their profile signature.