breglobal

User Manual

BREEAM In-Use

Property Management System

www.breaminuse.org.uk

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1. About this guide

We are continually improving the BREEAM In-Use self assessment tool, and therefore, some of the screens in this manual may not reflect the latest changes.

Any comments or suggested improvements regarding this user guide can be emailed to the BREEAM In-Use mailbox at <u>biu@bre.co.uk</u>

2. Introduction to our new automated asset management system

This User Manual provides BREEAM In-Use users with a step by step guide on how to use the new self assessment system.

Historically, all BREEAM assessments were completed using a paper based system supported by a spreadsheet tool.

This new system is a web based software tool, which can be accessed from any internet enabled computer platform, making it possible to rate existing buildings that are currently in use.

The system will enable portfolio owners and managers to monitor all of their BREEAM In-Use assessments from the registration stage, all the way through to the issuing of the final certificate.

Portfolio owners can register a portfolio, complete and submit assets using the system. After the asset has been registered an electronic copy of the self assessment tool can be downloaded.

2.1 The BREEAM In-Use Process for registration to certification



2.2 Who can use the system

The main users of the BREEAM In-Use system will be portfolio owners, portfolio managers and asset managers.

The system will allow portfolio owners to begin the assessment process by registering themselves, followed by the details of their portfolio.

In addition, portfolio owners will also be able to enter the details of other users, and assign them a particular access level.

There are 3 types of user access level;

- Portfolio Owner
- Portfolio Manager
- Asset Manager

2.3 Overview of system features

- This new system will enable portfolio owners to:
- Register a portfolio.
- Billing/Payment
- Create portfolio manager & asset manager accounts.
- Register assets.
- Download & Submit Questionnaire.

2.4 System queries and support

• For support with the BREEAM In-Use System, please refer to this guide in the first instance.

2.5 Technical guidance

• For technical guidance and general queries relating to BREEAM In-Use please email the BREEAM In-Use inbox at <u>biu@bre.co.uk</u>.

2.6 Help with the automated system

For help and support using the BREEAM In-Use system email the BREEAM In-Use inbox at <u>biu@bre.co.uk</u>.

2.7 Email

• Emails should be sent to the BREEAM In-Use inbox at <u>biu@bre.co.uk</u>.

2.8 System time out

• After approximately 10 minutes of system inactivity the system will automatically log you out. You will be required to log in again to access your records.

3. Registering an account

• Before the system can be used, you must create a user account. Below is a description of what is involved in this process:

3.1 The account registration form

• Open your internet browser and go to the following address:

www.breaminuse.org.uk

• Complete the registration form on the home page:

Register here to use the Online System	
Your Email: *]
Company * Name:]
Business Sector:Select One	*
Approx No * Assets:]
Town/City: *]
County: *Select One 💉	
Post Code: *	
Country: *Select One 😒	
Title: Mr 💌	
First Name: *]
Surname: *]
Job Title: *]
Phone No: *]
Register Now	

- Fields with red stars against them are mandatory for completion.
- Once you have completed all mandatory fields, click Register Now to continue.

PLEASE NOTE: The number of assets you wish to register (and pay for in this transaction) should be entered in the field titled **Approx no assets**. Additional payments to register more assets can be made within the system at any time.

3.2 Register your details – further information

- Once the initial registration form is completed, you will be asked to complete additional information about yourself.
- This will include entering a password, which you will then have to confirm.

KL.		1
Organisation	BREGb balltd	
Address line 1	Bucknalls Lane	
Address line 2	Garston	
Address line 3		
Address line 4		
Town / City	Wa tford	
County	Hertfordshire	
Post Code	WD 25 9XX	
Country	UK 💌	
Title	Mr 💌	
First Name	Joe	
Surname	Bloggs	
Job title	Portfolio Owner	
Job Role	Building Owner	
Department	n/a	
Division	n/a	
Contact No - Office	01923 660 000	
Contact No - Mobile	07876 123456	
Username(Email)	joe.blaggs@bre.co.uk	
Password	••••	
Confirm Password		
Business Sector	Construction	*
Approx No Assets:	1	
2nd Contact Name	1	
2nd Contact Email		

 Once you have completed the form, please click Continue to advance past the log in process. **PLEASE NOTE:** Not all of the information requested on this form is mandatory for completion. Also, this form can be updated at any time after this step in the process.

3.3 Accepting the BREEAM in-use terms and conditions

- Once the additional registration form has been completed, a new screen will appear detailing terms and conditions associated with various aspects of BREEAM In-Use. All terms and conditions must be accepted if you wish to continue with your registration.
- In order to show that you agree with the terms and conditions, check the box marked 'I agree', then click 'Next', as shown in the screen shot below:

	eum <u>in-use</u>
BREEA	REGISTRATION M-IN-USE
Terms	and conditions of business
1. Abo	ut these Terms and Conditions
In these custome referen togethe conditio	e terms and conditions "we" and "us" means Building Research Establishment Ltd, and "you" means you the er. In these terms and conditions words spelt with initial capital letters are defined terms. For your ease of ce these defined terms are listed together at the end of the terms and conditions. These terms and conditions er with your Order constitute the Contract between us and you for the supply of Products. No other terms and ons shall apply. The Contract cannot be varied unless we agree to vary it in writing or by email.
2. Plac	ing Your Order
2.1 To ;	place an Order you must be 18 years of age or over.
2.2 You "Check IN-USE,	I may place an Order by following the ordering process on the BREEAM-IN-USE website and clicking on the Out [®] button, or by sending an Order with payment (including payment for post and packing) by post to BREEAM- , BRE Ltd, Garston, Watford, Herts. WD25 9XX United Kingdom.
2.3 Wh	en vou place vour Order. we will issue vou with a Oustomer Order Number and an Order Confirmation by emails if
OI	Agree O I Do Not Agree Next

• Your account will then be made live automatically, and you will be able to log into the BREEAM In-Use online system.

Please Note! Your username is the e-mail address you used to register your portfolio. Please ensure you keep your password secure. Do not allow any other person to know your password or to use your BREEAM In-Use System account.

4. Billing/ payment

- A billing summary screen will open
- On this screen you will see the approximate number of assets that you specified upon registering your portfolio.
- If this number of assets still applies then check the amount.
- The Registration of assets is charged at £100 per asset registered.
- If the number of assets you require to register has changed since registering your portfolio click in the 'quantity' box and increase/reduce the number of assets.

breea	nin-use	About Terr	ms BRE Website	Privacy BREEAM Website	Help
	BILLI	NG SUMMARY			
	No. Description 1 Registration of individual assets	Price £100.00	Quantity Tot	al	
	To change, enter new quantity(qty) and click on	Total excluding	g VAT : £10 Update	00.00	
	Back	Continue			

- Once you have changed the number of assets, click the update button to refresh the total amount to pay.
- Then click the 'Continue' button.
- You can either pay by invoice or online using your credit or debit card.
- The method of payment will default to invoice if you require registering over 30 assessments.
- Any submissions of 30 assets or less you will need to pay for online using your debit or credit card.
- The system will generate a statement. (This is not an invoice.)
- Check all the amounts on the statement thoroughly.
- If you are happy with all the details shown on the statement click 'Complete Transaction'. If you notice anything incorrect on the statement click 'Amend above Details' to go back a step and re-enter the information on the pervious screen. If you have decided against registering your portfolio at this time click 'Cancel'.

DREEAN	In-Use						
				S	TATE	MEN	Т
То				BRI BRI Bucl Gars Unit	EEAM In E Global knalls Lane, ston,Watford red Kingdom	- Use, Ltd, d, WD25 9X	x.
Mr.Jo	Bloggs			Date	e : 05/06/2	009	
BRE, Buckna Watfoi	alls Lane, Garston, - WD25 9CC, rd, Hertfordshire, UK.						
BRE, Buckna Watfor SiNo.	alls Lane, Garston, - WD25 9CC, rd, Hertfordshire, UK. Descript	ion	Price	Qty	Net Amount	VAT	Total Amount
BRE, Buckna Watfor SINo.	alls Lane, Garston, - WD25 9CC, rd, Hertfordshire, UK. Descript Registration of individual assets	ion	Price £100.00	Qty 29	Net Amount £2900.00	VAT £435.00	Total Amount £3335.00

4.1 Credit/ debit card payments

• This option is only available for the registration of portfolios with less than 30 units.

Credit card payment for BREEAI	1 In Use < the 'Go to checkout' button to make	your payment.	Please check these details carefully – this is your last opportunity to correct them. If you need to alter the billing or delivery address, select the 'edit address' button.
Billing address [edit address] Mr.Jo Bloggs BRE Bucknalls Lane Garston Watford Hertfordshire WD25 9CC United Kingdom	Delivery to [edit address] Mr.Jo Bloggs BRE Bucknalls Lane Garston Watford Hertfordshire WD25 9CC United Kingdom		When you press 'go to checkout you will move onto a 128-bit encrypted secure server, run and managed by Netbanx. To confirm that you are using a secure link and that your credit card details will be safe in transi look for the 'padlock' icon at the bottom left of the screen, and fi
Order details			the secure address starting http: in the address bar.
Description	Qty	Price	
BIUSEcredit	29	£100.00	
Totals	Sub-total :	£2900.00	
	VAT :	£435.00	

- Please check one final time that all of the information on the Credit card payment screen is correct before clicking 'Go to checkout'.
- Another new window will open asking you to enter your card details.

Credit card payment				
his transaction is being carried out over a se or your security.	cure link. NetBanx tr	ransactions are encod	ed NET	BANX
letBanx will carry out an online authorisation our account if it is cleared.	of your card and will	debit £3335.00 from	×	
our transaction will be approved in a few seco	onds.			
Please complete the form below			un arreat i	ha fallouia
Cardholder's name:	null		we accept i	inds
Cardholder's e-mail address:	jobloggs@bre.co	p.uk		15.4
Cardholder's post/zipcode:	WD25 9CC			
Card number:			Mas	terCard
Card issue number (if applicable):			5	Solo
Card start date:	January 🔽	1999 🐱		DELTA
Card expiry date:	January 🖌	2001 🛩	Ó	
Transmit	Clear form		_	

• Complete the information required then click 'Transmit' to complete the transaction.

4.2 Invoicing

- This method of payment is mandatory for any portfolios with more than 30 assets.
- A window will open requesting you to enter you preferred invoicing address.
- Complete all the fields in this form.

PREFERRED BILLIN	G/INVOICE ADDRESS
Company Registered Country	Select One V
Company registration number	
Company's Purchase Order number	
Address line 1	
Address line 2	
Address line 3	
Address line 4	
Town /City	
County	Select One 👻
Post Code	
Country	Select One 👻
Name of the Person Invoice to be addressed	
Contact No of the Person invoice to be sent	
Fax No of the Person invoice to be sent	
Email-id of the Person invoice to be sent	
	Back Continue

- Once you have completed all of the required information, click 'Continue'.
- A statement will show, and an invoice will be sent out in the post.

To, Jo bloggs BRE, Bucknalls Lane, Garston,, , Watford, Hertfordshire- WD25 9XX, UK. Purchase Order Number : SINo. Description Price Qth L. Registration of individual assets £100.00 31			
To, Jo bloggs BRE, Bucknalls Lane, Garston, , , Watford, Hertfordshire- WD25 9XX, UK. Purchase Order Number : SINo. Description Price Qb L Registration of individual assets £100.00 31	TATE	MEN	IT
I O, Jo bloggs BRE, Bucknalls Lane, Garston,, , Watford, Hertfordshire- WD25 9XX, UK. Purchase Order Number : SINo. Description Price Qte 1 Registration of individual assets £100.00 31	REEAM In RE Global ucknalls Lane, arston, Watfor nited Kingdon	n-Use, I Ltd, ^{e,} ord, om WD25 9)	α.
Purchase Order Number : SINo. Description Price Qtr Registration of individual assets £100.00 31	ate : 05/06/2	/2009	
SINo. Description Price Qt Registration of individual assets £100.00 31		_	
1 Registration of individual assets £100.00 31	Net Amount	t VAT	Total Amount
	£3100.00	0 £465.00	£3565.00
Statement To	al:		£3565.00

5. Logging onto the system

- Open your internet browser and go to <u>www.breeaminuse.org.uk</u>
- Enter your Username.
- Enter your Password.
- Click the Login button.
- Your user login panel will then be displayed:

Please Note! Please ensure you keep your password secure. Do not allow any other person to know your password or to use BREEAM In-Use System account.

5.2 User – login panel

• A link titled Control Panel exists at the top of all pages within the system. Once on the Control Panel main page, the user can perform a number of functions. Below is the control panel view available to the portfolio owner:

Portfolio Owner • Register a new portfolio, • View / update portfolio details.	Portfolio Manager
Monitor portfolio status. Access Now	View / update asset details. Download questionnaire. Monitor certified asset performance. Access Now
Asset Manager • Upload questonnaire. • Monitor certified asset performance. Access Now	User Logon Maintenance • Create user logons. • Update user details. Access Now
Log Off	

Please Note! This screen will differ slightly depending on what level of access you have to the system i.e. Portfolio Owner, Portfolio Manager or Asset Manager.

a. Portfolio Owner

This allows the portfolio owner to register a new portfolio, view and update portfolio details and monitor their portfolio performance.

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b. Portfolio manager

This option available to both portfolio owners and portfolio managers can be used to register a new asset in a portfolio, view and amend asset details, download questionnaires and monitor certified assets performance.

c. Asset manager

Here the asset manager can upload questionnaires and monitor certified asset performance.

d. User logon maintenance

This link opens a window listing all users and their logon details and can be used by portfolio owners to create portfolio manager accounts or portfolio managers to create or amend new asset manager's login id.

e. Log off

Securely exit the system.

5.3 Logging out

- It is important for data security that you do not remain logged in to the system if leaving your personal computer unattended. (The system will automatically log you out after 10 minutes system inactivity).
- Click on the Log Off text at the top right hand corner of the page:

breeam in-use

Control Panel Log Off Logged in as Portivilo Owner

6. Portfolio owner

- The initial user of the system is the Portfolio Owner. From this screen the portfolio owner can;
 - Register a new portfolio.
 - View / update portfolio details.
 - Monitor portfolio status.
 - Register a new asset in a portfolio.
 - View / update asset details.
 - Download questionnaire.
 - Monitor certified asset performance.
 - o Create user logons.
 - o Update user details.

6.1 Registering a new portfolio – option only available to portfolio owners

• To register a new portfolio, click 'enter' in the 'portfolio owner' box.

breeamin-use	Logged	Log Off I in as Portfolio Owner Porto 7
	About Terms DRE Website Pr	vecy DRECAM Website H
USER -	LOGIN PANEL	
Name: Mr.Porta 7		
Portfolio Owner + Register a new portfolo. • Vew / update portfolio details. • Monto: portfolio status.	Portfolio Manager • Register a new esset in a portfolio. • Vew / update satest details. • Download cuestomane. • Monitor certified asset performance. Access Now	
Asset Manager + Upload questionname. + Monitor certified asset performance. Access Now	User Logon Maintenance • Create user logons. • Update user details. Access Now	
Log Off Access Now		

• Then click where it says 'Register new portfolio'.

Portfolio Summary	Portfolio Registration Portfolio	Details							
Portfolio List for Joe Bio	995							St	arch
Portfolio Name	Registration Date	Reference Number	No Of Assets	Assets Certified	Perc(%) Complete	AST Score	BDM Score	ORG Score	Status
ages 1		Page:	1						
tegister New Portfolio									

• A new screen will open called 'Portfolio registration' here the Portfolio owner should enter some basic information for the creation of their portfolio.

breeam <u>in-use</u>		Control Pane Log Off Logged in as Portfolio Owner Joe Blogge
Portfolio Summary Portfolio Registration	Portfolio Details	
Portfolio Registration		
Registered On: 03 June 2009		
PORTFOLIO DETAILS:		
Organisation: BREG		
Division (if applicable):		
Portfolio Name: Test Portfolio 1		
Portfolio Manager: Joe Bloggs 👽 *		
Description: TEST 1		
Registration Complete:		
		Cancel Submit

• Once all the necessary portfolio information has been completed, click submit to create the portfolio.

6.2 Viewing/ editing an existing portfolio

• To view an existing portfolio, from the Login Panel click on the portfolio owner button.

breeam in-use

Portfolio List for Joe Bloggs									Search
Portfolio Name	Registration Date	Reference	No Of	Assets	Perc(%)	AST	BDM	ORG	Status
est Portfolio 1	03/06/2009		0	0	0	0	0	0	InComplete
Fest Portfolio 2	03/06/2009		0	0	0	0	0	0	InComplete
ages: 1		Page	: 1						

- The Portfolio Summary page (above) displays a table detailing all portfolio's that are currently assigned to you.
- Click on the portfolio name.
- A tab called 'Update portfolio details' will open; here you can view or amend the portfolio title and manager.

Please Note! The Portfolio manager drop down list will only display the names of users that have had accounts created and activated with the user access level of portfolio manager.

breeam <u>in-use</u>	Control Panel Log Off Logged in as Portfolio Owner Joe Bloggs
Portfolio Summary Portfolio Registration Portfolio Portfolio Contents	Details
Update Portfolio Details Assets Questionnaire Update Portfolio details of Test Portfolio 1 Registered On: 03 June 2009	
PORTFOLIO DETAILS:	
Organisation: BREG Division (if applicable):	
Portfolio Manager: Joe Bloggs 💌 *	
Test Portfolio 1	
Description: TEST 1	
Registration Complete:	
	Cancel Update

• When you have completed making amendments click 'Update'.

6.3 Search for a portfolio

 To search for a portfolio click in the search box provided, then type in the name of the portfolio.

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Control Panel

Log Off Logged in as Portfolio Owner Joe Bloggs

breeamin-use

Portfolio Summary	Portfolio Registration	Portfo	lio Details							
Portfolio List for Joe E	loggs				Tes	t Portfolio 2				Search
Portfolio Name	Regis Date	tration	Reference Number	No Of Assets	Assets Certified	Perc(%) Complete	AST Score	BDM Score	ORG Score	Status
Test Portfolio 1	03/06/	2009		0	0	0	0	0	0	InComplete
Test Portfolio 2	03/06/	2009		0	0	0	0	0	0	InComplete
Test Portfolio 3	03/06/	2009		0	0	0	0	0	0	InComplete
Pages: 1			Page	: 1						

- Now click the 'Search' button.
- Provided that the portfolio you searched for exists, the screen will refresh and will now show only that portfolio.

Control Logged in as Portfolio Owner Joel										Control Panel Log Off rtfolio Owner Joe Bloggs
Portfolio Summary	Portfolio Registra	tion Portfo	lio Details		Tes	t Portfolio 2				Search
Portfolio Name		Registration Date	Reference Number	No Of Assets	Assets Certified	Perc(%) Complete	AST Score	BDM Score	ORG Score	Status
Test Portfolio 2		03/06/2009		0	0	0	0	0	0	InComplete
Pages: 1 Register New Portfolio			Page	: 1						

Control Panel Log Off

Logged in as Portfolio Owner Joe Bloggs

6. Creating user login ID's

• To create a user profile and login ID for other BREEAM In-Use users, click the 'Enter' button in the User Logon Maintenance box.

Portfolio Owner	Portfolio Manager
Register a new portfolio. View / update portfolio details.	 Register a new asset in a portfolio. View / update asset details.
Monitor portfolio status	Download questionnaire. Monitor certified asset performance.
Access Now	Access Now
Asset Manager	User Logon Maintenance
Upload questionnaire. Monitor certified asset performance.	Create user logons. Update user details.
Access Now	Access Now
Access Now	Access Now

• A new window will open listing all users.

	REGI	STERED USERS - ADMI	N				
Sl.No. First Name	Surname	UserName	PM	AM	₽€	Aud	Activate
		-		_			
	Back Add N	ew User Update U	sers				

7.1 Adding a new user

- To add a new user account, first click the 'Add New User' button.
- The user registration form will appear:

	USER REGISTRAT	ION FORM
Title	Mrs 💙	
First Name	Jane	*
Surname	Bloggs	*
Job Title	-	
Responsibility	-	
Department	-	
Contact number - Office	-	
Contact Number - Mobile	-	
Username(Email)	jane.bloggs@bre.co.uk	*
Password	test	
Confirm Password	test	at the second seco
Back	Register Now	
Enter al *indicated fields		

- Enter the required fields then click Register Now.
- You can now see the newly created user on the registered users list, shown in the screen shot below.

	REGISTERED USERS - ADMIN									
SLNo.	First Name	Surname	UserName	PM	AM	Q€	Aud	Activate		
1	Jane	Bloggs	jane.bloggs@bre.co.uk							

7.2 Granting user access levels

- You must now decide what level of access to give the new user. At present there are two choices:
 - o Portfolio Manager
 - o Asset Manager
- To do this click in the appropriate tick box, under PM for portfolio manager, or AM for asset manager.

8. The portfolio manager

- Portfolio managers can only be created by the portfolio owner.
- A portfolio owner may assign a portfolio manager to each of his/her portfolios.
- The portfolio manager is then responsible for adding assets.
- To add an asset to a portfolio, first you must assign the portfolio to one of your portfolio managers.
- To do this you must be logged in as the portfolio owner.
- Once logged in as the portfolio owner, access the portfolio owner menu from the user login panel to view a list of your portfolios.

USER - LO	OGIN PANEL
Name: Mr. Joe Bloggs	
Portfolio Owner • Register a new portfolio, • View / update portfolio details. • Monitor portfolio status. Access Now	Portfolio Manager • Register a new asset in a portfolio, • View / update asset details, • Download questionnaire, • Monitor certified asset performance, Access Now
Asset Manager • Upload questionnaire. • Monitor certified asset performance. Access Now	User Logon Maintenance • Create user logons. • Update user details, Access Now
Log Off	

• Open appropriate the portfolio by clicking on its name, under the portfolio name column on the left hand side of the table.

breear	Nin-use					222	Logge	d in as P	Contro I ortfolio Owner Joe	l Panel L og Off Bloggs
				About	Terms	BRE Websit	e Pri	vacy I	BREEAM Website	Help
Portfolio Summary Po	ortfolio Registration Por	rtfolio Details								
Portfolio List for Joe Blogg]s								Search	
Portfolio Name	Registratio Date	n Reference Number	No Of Assets	Assets Certified	Perc(%) Complete	AST Score	BDM Score	ORG Score	Status	
Test Portfolio 1	03/06/2009		0	0	0	0	0	0	InComplete	
Test Portfolio 2	03/06/2009		0	0	0	0	0	0	InComplete	
Test Portfolio 3	03/06/2009		0	0	0	0	0	0	InComplete	
Pages: 1		Page	: 1							
Register New Portfolio										

- Now you will see the details associated with that portfolio, on the portfolio details form. There is a field within the portfolio details form that allows you to assign a portfolio manager.
- Click in the dropdown box called portfolio manager.
- This will show a list of all users with portfolio manager status.

breeam	in-use]					Logged in a	Contr as Portfolio Owner Joe	ol Panel Log Off Bloggs
		1	Al	bout	Terms	BRE Website	Privacy	BREEAM Website	Help
Portfolio Summary Port	tfolio Registration	Portfolio Details							
Portfolio Contents		1							
Update Portfolio Details	Assets								
Update Portfolio details of Te	est Portfolio 1								
Registered On:	03 June 2009								
PORTFOLIO DETAILS:									
Organisation:	BREG								
Division (if applicable):	-								
Portfolio Manager:	Jane Bloods 💙 🔹								
	UnAssigned								
Portfolio Name:	Joe Bloggs 1 Jane Bloggs	8							
Description:	TEST 1								
Registration Complete:									
	Cancel		Update						

- From the dropdown, select a portfolio manager, then click the "Update" button.
- You have now assigned the portfolio to the selected portfolio manager.

9. Adding an asset

- Adding assets is carried out by the portfolio manager only.
- In order to add an asset to a portfolio, first ensure that you are logged into the system as the portfolio manager.
- From the portfolio summary screen, click on the name of the portfolio to which you would like to add assets.

breed	ות IM in-u:	se						Logged	l in as Po	Contro ortfolio Owner Jane	ol Panel Log Off Bloggs
					About	Terms I	BRE Websit	e Pri	vacy	BREEAM Website	Help
Portfolio Summary	Portfolio Details]									
Portfolio List for Jane	Bloggs									Search	
Portfolio Name		Registration Date	Reference Number	No Of Assets	Assets Certified	Perc(%) Complete	AST Score	BDM Score	ORG Score	Status	
Test Portfolio 1		03/06/2009		0	0	0	0	0	0	InComplete	
Pages: 1			Page :	1							

• You will then see the portfolio details screen, as shown below. From here, click on the 'Add New Asset' button.

breeam	lin-use				Logg	led in as Po	Contro prtfolio Manager Jane	ol Panel Log Off Bloggs
			About	Terms	BRE Website	Privacy	BREEAM Website	Help
Portfolio Summary Port	tfolio Details							
Portfolio Contents								
Update Portfolio Details Portfolio details of Test Port	Assets folio 1							
Registered On:	03 June 2009							
PORTFOLIO DETAILS:								
Organisation:	BREG							
Division (if applicable):	-							
Porfolio Manager:	Jane Bloggs 💌							
Description:	TEST 1							
Registration Complete:								
	Back	Add New As	set					

• This will open the Asset summary screen for the selected portfolio, as shown on the next page:

breeam in	I-use							Logged in a	Control Panel Log Off s Portfolio Owner Porto 7
				A	bout	Terms	BRE Websit	e Privacy	y BREEAM Website
Portfolio Summary Portfolio Portfolio Contents Update Portfolio Details Asse Add New Asset to Porfolio Test 01	Details								
Asset Working Name	Asset Ref	Asset Manager	Date Registered	AST Score	BDM Score	ORG Score	Perc(%) Complete	Status	Questionnaire
Test Asset 10 - 03/06/09 @ 1316		Porto 7	03/06/2009	0	0	0	0	Assigned	Download
Pages: 1 Add New Asset to Portfolio									Page: 1

- Now click where it says Add New Asset to Portfolio
- Once clicked, this will open the asset registration form

Portfolio Summary P	ortfolio Details	
Update Portfolio Details	Assets	
Assets Details for Test Po	rtfolio 1	Credit left in your account to register '5' assets.
Registered On:	04 June 2009	
ASSET DETAILS		
Portfolio Owner:	BREG	
Portfolio Manager:	Jane Bloggs	
Asset Working Name:		
Asset Manager:	UnAssigned 💙	
Asset Description:		
FULL ASSET ADDRESS		
Unit No(s):		
Floor(s):		
Building No:		
Building Name:		
Business park/Industrial estate:		
Street1:		
Street2:		
Local Area Name:		
Town:		

• The asset registration form has to be completed in order to register an asset.

- Once all details are entered, tick the Registration Complete tick box and click the Save button in order to register the assessment.
- You will now see this asset listed under the portfolio.

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Portfolio Summary Portfolio Details										
Portfolio Contents Update Portfolio Details Assets										
Add New Asset to Portolio Test Portfolio Asset Working Name	1 Asset Ref	Asset Manager	Date Registered	AST Score	BDM Score	ORG Score	Perc(%) Complete	Status	Questionnaire	
Test Asset 1		Jane Bloggs	04/06/2009	0	0	0	0	Assigned	Download	
Pages: 1									Page : 1	
Add New Asset to Portfolio										

10. Downloading a questionnaire

- Once a portfolio and an asset have been registered, the user can download a questionnaire to assess the asset.
- From the asset summary screen, a 'Download' link can be found next to each registered asset.

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Portfolio Summary Portfolio Details Portfolio Contents Update Portfolio Details Assets Add New Asset to Porfolio Test 01/06/0	9 @ 1620									
Asset Working Name	Asset Ref	Asset Manager	Date Registered	AST Score	BDM Score	ORG Score	Perc(%) Complete	Status	Questionnaire	
Test Asset 10 - 03/06/09 @ 1316		Porto 7	03/06/2009	0	0	0	0	Assigned	Download	
Pages: 1 Add New Asset to Portfolio									Page : 1	

• Once clicked, the system will download an excel version of the BREEAM In-Use questionnaire to the users machine.