



# My Library User Guide

LeaseAccelerator

Version 25.2



# Document Information

## Notices

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### Disclaimer

This guide is designed to help you to use the LeaseAccelerator applications effectively and efficiently. All data shown in graphics are provided as examples only. The example companies and calculations herein are fictitious. No association with any real company or organization is intended or should be inferred.



# Contents

<b>Document Information</b> .....	<b>2</b>
Notices .....	2
<b>Contents</b> .....	<b>3</b>
<b>My Library</b> .....	<b>4</b>
Adding Documents to Existing Library Shelves .....	4
Requesting New Shelves in My Library .....	6
<b>Version Summary</b> .....	<b>7</b>



# My Library

The My Library feature of LeaseAccelerator allows customers to store documents for all users to view. These documents may include customer specific master documents such as lists or reference materials but may also include LeaseAccelerator materials if your implementation team has imported them into your Production environment.

Home

My Dashboard My To-Do List **My Library**

Reference Materials

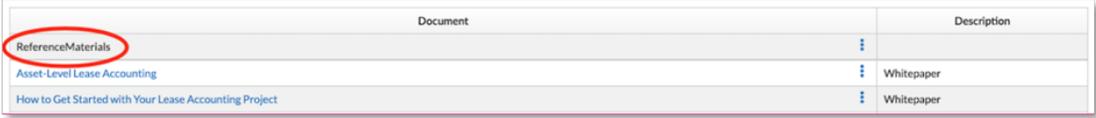
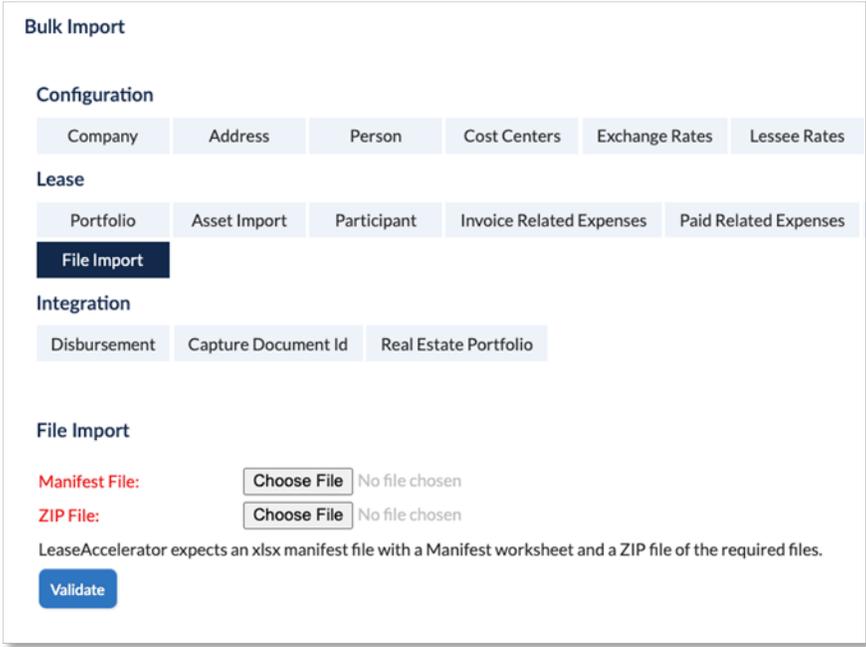
Document	Description
ReferenceMaterials	
Asset-Level Lease Accounting	Whitepaper
How to Get Started with Your Lease Accounting Project	Whitepaper
How to Collect Your Lease Accounting Data	Whitepaper
Lease Accounting and Administration Software	Whitepaper
SSO Guide	API
API for Asset Management	API
LeaseAccelerator Enterprise Integration Guide	API

Please follow the steps below to import your own documents into shelves in My Library.

## Adding Documents to Existing Library Shelves

LeaseAccelerator utilizes the Bulk Import feature to give the user a simple and efficient way to add documents to existing shelves in My Library.

Step	Action																																																																																																
1	<b>Download</b> the latest version of the PIW (Portfolio Intake Workbook) from Ask Alex or the Success Center.																																																																																																
2	Populate the Manifest tab of the PIW. <table border="1"> <thead> <tr> <th>Schedule Number</th> <th>Document Type</th> <th>Document Number</th> <th>Document Status</th> <th>File Name</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>ImportDocumentation</td> <td>PIW Validation Checklist</td> <td>Original</td> <td>PIW Validation Checklist v1.0.pdf</td> <td>v1.0</td> </tr> <tr> <td>2</td> <td>ImportDocumentation</td> <td>CIW Validation Checklist</td> <td>Original</td> <td>CIW Validation Checklist v1.0.pdf</td> <td>v1.0</td> </tr> <tr> <td>3</td> <td>ImportDocumentation</td> <td>General Ledger Configuration Guide</td> <td>Original</td> <td>2A. General Ledger Configuration Summary Guide.docx</td> <td>v2.0</td> </tr> <tr> <td>4</td> <td>ImportDocumentation</td> <td>Portfolio Intake Workbook</td> <td>Original</td> <td>PIW 17R2 1.4.xlsx</td> <td>17R2 v1.4</td> </tr> <tr> <td>5</td> <td>ImportDocumentation</td> <td>Configuration Intake Workbook</td> <td>Original</td> <td>CIW 17R2 1.4.xlsx</td> <td>17R2 v1.4</td> </tr> <tr> <td>6</td> <td>ImportDocumentation</td> <td>Client Intake Guide and Data Dictionary</td> <td>Original</td> <td>Client Intake Guide November 2017.pdf</td> <td>Nov-17</td> </tr> <tr> <td>7</td> <td>Product</td> <td>17R2 Concept of Operations</td> <td>Original</td> <td>17R2_ConOps 09_25_2017.pdf</td> <td>Concept of Operations</td> </tr> <tr> <td>8</td> <td>Product</td> <td>Product Feature Advisory - Lease Classification PV Test</td> <td>Original</td> <td>Product Feature Advisory - Lease Classification PV Test.pdf</td> <td></td> </tr> <tr> <td>9</td> <td>Product</td> <td>Product Feature Advisory - GL Coding Convention Required Account</td> <td>Original</td> <td>Product Feature Advisory - GL Coding Convention requir</td> <td>10/4/17</td> </tr> <tr> <td>10</td> <td>Product</td> <td>Product Feature Advisory - Environment Changes</td> <td>Original</td> <td>Product Feature Advisory - environment changes 06_22_1</td> <td>6/22/17</td> </tr> <tr> <td>11</td> <td>Product</td> <td>Product Feature Advisory - Fiscal Calendar</td> <td>Original</td> <td>Product Feature Advisory - Fiscal Calendar 07_21_17.pdf</td> <td>7/21/17</td> </tr> <tr> <td>12</td> <td>ReferenceMaterials</td> <td>LeaseAccelerator API Guide</td> <td>Original</td> <td>LeaseAccelerator API Guide v1.1.pdf</td> <td>v1.1</td> </tr> <tr> <td>13</td> <td>ReferenceMaterials</td> <td>LeaseAccelerator Single Sign On Integration Guide</td> <td>Original</td> <td>LeaseAccelerator Single Sign On Integration Guide 1.1.pdf</td> <td>v1.1</td> </tr> <tr> <td>14</td> <td>ReferenceMaterials</td> <td>Using the LeaseAccelerator API for Asset Management Integration</td> <td>Original</td> <td>Using the LeaseAccelerator API for Asset Management Intv1.0</td> <td></td> </tr> <tr> <td>15</td> <td>ReferenceMaterials</td> <td>Using the LeaseAccelerator API for ERP Integration</td> <td>Original</td> <td>Using the LeaseAccelerator API for ERP Integration.pdf</td> <td>v1.0</td> </tr> </tbody> </table>	Schedule Number	Document Type	Document Number	Document Status	File Name	Comments	1	ImportDocumentation	PIW Validation Checklist	Original	PIW Validation Checklist v1.0.pdf	v1.0	2	ImportDocumentation	CIW Validation Checklist	Original	CIW Validation Checklist v1.0.pdf	v1.0	3	ImportDocumentation	General Ledger Configuration Guide	Original	2A. General Ledger Configuration Summary Guide.docx	v2.0	4	ImportDocumentation	Portfolio Intake Workbook	Original	PIW 17R2 1.4.xlsx	17R2 v1.4	5	ImportDocumentation	Configuration Intake Workbook	Original	CIW 17R2 1.4.xlsx	17R2 v1.4	6	ImportDocumentation	Client Intake Guide and Data Dictionary	Original	Client Intake Guide November 2017.pdf	Nov-17	7	Product	17R2 Concept of Operations	Original	17R2_ConOps 09_25_2017.pdf	Concept of Operations	8	Product	Product Feature Advisory - Lease Classification PV Test	Original	Product Feature Advisory - Lease Classification PV Test.pdf		9	Product	Product Feature Advisory - GL Coding Convention Required Account	Original	Product Feature Advisory - GL Coding Convention requir	10/4/17	10	Product	Product Feature Advisory - Environment Changes	Original	Product Feature Advisory - environment changes 06_22_1	6/22/17	11	Product	Product Feature Advisory - Fiscal Calendar	Original	Product Feature Advisory - Fiscal Calendar 07_21_17.pdf	7/21/17	12	ReferenceMaterials	LeaseAccelerator API Guide	Original	LeaseAccelerator API Guide v1.1.pdf	v1.1	13	ReferenceMaterials	LeaseAccelerator Single Sign On Integration Guide	Original	LeaseAccelerator Single Sign On Integration Guide 1.1.pdf	v1.1	14	ReferenceMaterials	Using the LeaseAccelerator API for Asset Management Integration	Original	Using the LeaseAccelerator API for Asset Management Intv1.0		15	ReferenceMaterials	Using the LeaseAccelerator API for ERP Integration	Original	Using the LeaseAccelerator API for ERP Integration.pdf	v1.0
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3	Populate the <i>Schedule Number</i> with the <b>Library Shelf</b> you want to post a document to.																																																																																																

Step	Action
4	<p>Ensure the name of the shelf is exactly what is found in the UI. Note where there are no spaces between words.</p>  <p>The screenshot shows a table with two columns: 'Document' and 'Description'. The 'Document' column contains three entries: 'ReferenceMaterials', 'Asset-Level Lease Accounting', and 'How to Get Started with Your Lease Accounting Project'. The 'Description' column contains 'Whitepaper' for the second and third entries. The 'ReferenceMaterials' entry is circled in red.</p>
5	Populate <i>Document Type</i> with <b>Attachment</b> .
6	Populate <i>Document Number</i> with the name of the document you are importing.
7	Populate <i>Document Status</i> with <b>Original</b> .
8	Populate the <i>File Name</i> with the <b>exact</b> file name of the document you want to import, including the extension.
9	Populate <i>Comments</i> with any information you wish to appear in the UI, such as version numbers or dates of publication.
10	<b>Save</b> the file.
11	<p>Create a zip file that includes all the files listed on the Manifest tab.</p> <p><b>Note:</b> When zipping the documents, ensure that you are not zipping any folders. You must zip the files only. Each document cannot exceed 50MB in size.</p>
12	<p>Navigate to the <b>Bulk Import</b> workspace in the UI and select the <b>File Import</b> tile.</p>  <p>The screenshot shows the 'Bulk Import' workspace. It has several sections: 'Configuration' with tabs for Company, Address, Person, Cost Centers, Exchange Rates, and Lessee Rates; 'Lease' with tabs for Portfolio, Asset Import, Participant, Invoice Related Expenses, and Paid Related Expenses; 'Integration' with tabs for Disbursement, Capture Document Id, and Real Estate Portfolio; and 'File Import' which is currently selected. Under 'File Import', there are two 'Choose File' buttons, one for 'Manifest File' and one for 'ZIP File', both showing 'No file chosen'. Below these is a 'Validate' button and a note: 'LeaseAccelerator expects an xlsx manifest file with a Manifest worksheet and a ZIP file of the required files.'</p>
13	Click <b>Choose File</b> and select the saved PIW as your Manifest File.
14	Click <b>Choose File</b> and select the zip file that contains all the documents you are importing.
15	Click <b>Validate</b> .

Step	Action
16	<p><b>Red</b>errors will prevent you from importing.</p> <p><b>Yellow</b> warnings will still allow you to import.</p>
17	<p>After addressing any validation messages, click <b>Import</b>.</p>
18	<p>When you've successfully imported the documents, you will see a green dot next to the Schedule Number, which is the shelf name.</p>

## Requesting New Shelves in My Library

New shelves may be requested that are customer specific. To do this, please submit a ticket requesting the name of the shelf. For more information, please reach out to your Implementation Manager or Customer Success Manager.



# Version Summary

Version	Changes/ Updates	Date
21R3	Template created	9/30/2021

