



My Library User Guide

LeaseAccelerator

Version 26.2.1



Document Information

Notices

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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.



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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.

The screenshot shows the 'My Library' section of the LeaseAccelerator interface. It includes navigation tabs for 'Home', 'My Dashboard', 'My To-Do List', and 'My Library'. Below the navigation is a section titled 'Reference Materials' containing a table with the following data:

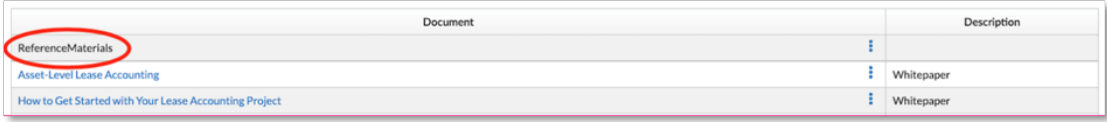
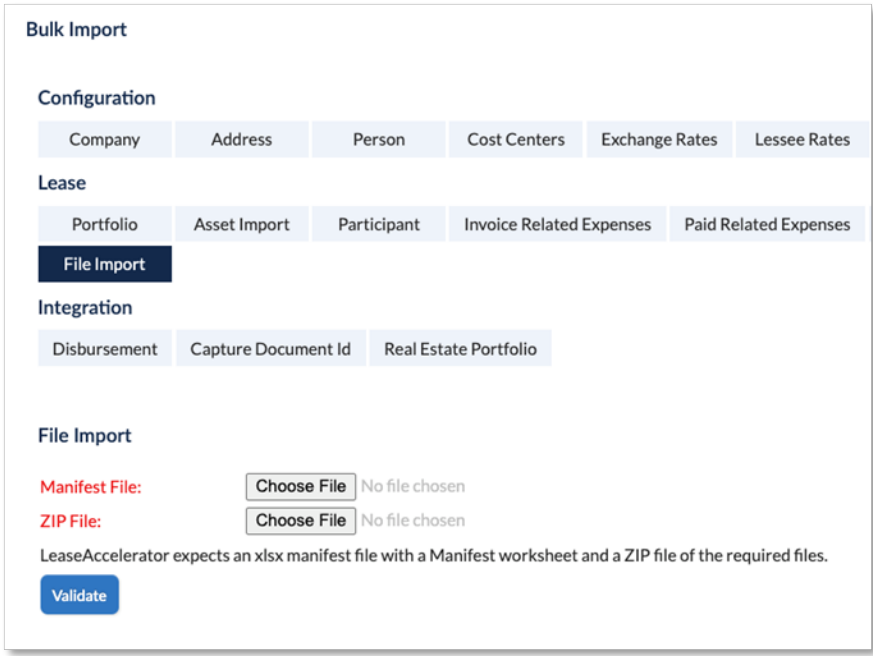
Document	Description
ReferenceMaterials	
Asset-Level Lease Accounting	Whitepaper
How to Get Started with Your Lease Accounting Project	Whitepaper
How to Collect Your Lease Accounting Data	Whitepaper
Lease Accounting and Administration Software	Whitepaper
SSO Guide	API
API for Asset Management	API
LeaseAccelerator 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	Download the latest version of the PIW (Portfolio Intake Workbook) from Ask Alex or the Success Center.																																																																																																						
2	<p>Populate the Manifest tab of the PIW.</p> <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>Attachment</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>Attachment</td> <td>Original</td> <td>PIW Validation Checklist v1.0.pdf</td> <td>v1.0</td> </tr> <tr> <td>3</td> <td>ImportDocumentation</td> <td>Attachment</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>Attachment</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>Attachment</td> <td>Original</td> <td>PIW 17R2 1.4.xlsx</td> <td>17R2 v1.4</td> </tr> <tr> <td>6</td> <td>ImportDocumentation</td> <td>Attachment</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>Attachment</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>Attachment</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>Attachment</td> <td>Original</td> <td>Product Feature Advisory - GL Coding Convention Required Account</td> <td>10/4/17</td> </tr> <tr> <td>10</td> <td>Product</td> <td>Attachment</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>Attachment</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>Product</td> <td>Attachment</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>Attachment</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>Attachment</td> <td>Original</td> <td>Using the LeaseAccelerator API for Asset Management Int</td> <td>v1.0</td> </tr> <tr> <td>15</td> <td>ReferenceMaterials</td> <td>Attachment</td> <td>Original</td> <td>Using the LeaseAccelerator API for ERP Integration.pdf</td> <td>v1.0</td> </tr> <tr> <td>16</td> <td>ReferenceMaterials</td> <td>Attachment</td> <td>Original</td> <td>Using the LeaseAccelerator API for ERP Integration</td> <td>v1.0</td> </tr> </tbody> </table>	Schedule Number	Document Type	Document Number	Document Status	File Name	Comments	1	ImportDocumentation	Attachment	Original	PIW Validation Checklist v1.0.pdf	v1.0	2	ImportDocumentation	Attachment	Original	PIW Validation Checklist v1.0.pdf	v1.0	3	ImportDocumentation	Attachment	Original	2A. General Ledger Configuration Summary Guide.docx	v2.0	4	ImportDocumentation	Attachment	Original	PIW 17R2 1.4.xlsx	17R2 v1.4	5	ImportDocumentation	Attachment	Original	PIW 17R2 1.4.xlsx	17R2 v1.4	6	ImportDocumentation	Attachment	Original	Client Intake Guide November 2017.pdf	Nov-17	7	Product	Attachment	Original	17R2_ConOps 09_25_2017.pdf	Concept of Operations	8	Product	Attachment	Original	Product Feature Advisory - Lease Classification PV Test.pdf		9	Product	Attachment	Original	Product Feature Advisory - GL Coding Convention Required Account	10/4/17	10	Product	Attachment	Original	Product Feature Advisory - environment changes 06_22_1	6/22/17	11	Product	Attachment	Original	Product Feature Advisory - Fiscal Calendar 07_21_17.pdf	7/21/17	12	Product	Attachment	Original	LeaseAccelerator API Guide v1.1.pdf	v1.1	13	ReferenceMaterials	Attachment	Original	LeaseAccelerator Single Sign On Integration Guide 1.1.pdf	v1.1	14	ReferenceMaterials	Attachment	Original	Using the LeaseAccelerator API for Asset Management Int	v1.0	15	ReferenceMaterials	Attachment	Original	Using the LeaseAccelerator API for ERP Integration.pdf	v1.0	16	ReferenceMaterials	Attachment	Original	Using the LeaseAccelerator API for ERP Integration	v1.0
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3	Populate the <i>Schedule Number</i> with the Library Shelf 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 last two entries. The 'ReferenceMaterials' entry is circled in red.</p>
5	Populate <i>Document Type</i> with Attachment .
6	Populate <i>Document Number</i> with the name of the document you are importing.
7	Populate <i>Document Status</i> with Original .
8	Populate the <i>File Name</i> with the exact 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	Save the file.
11	<p>Create a zip file that includes all the files listed on the Manifest tab.</p> <p>Note: 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 Bulk Import workspace in the UI and select the File Import 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 Choose File and select the saved PIW as your Manifest File.
14	Click Choose File and select the zip file that contains all the documents you are importing.
15	Click Validate .

Step	Action
16	<p>Red errors will prevent you from importing.</p> <p>Yellow warnings will still allow you to import.</p>
17	<p>After addressing any validation messages, click Import.</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

