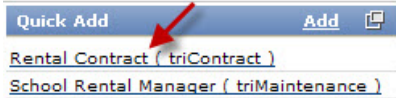


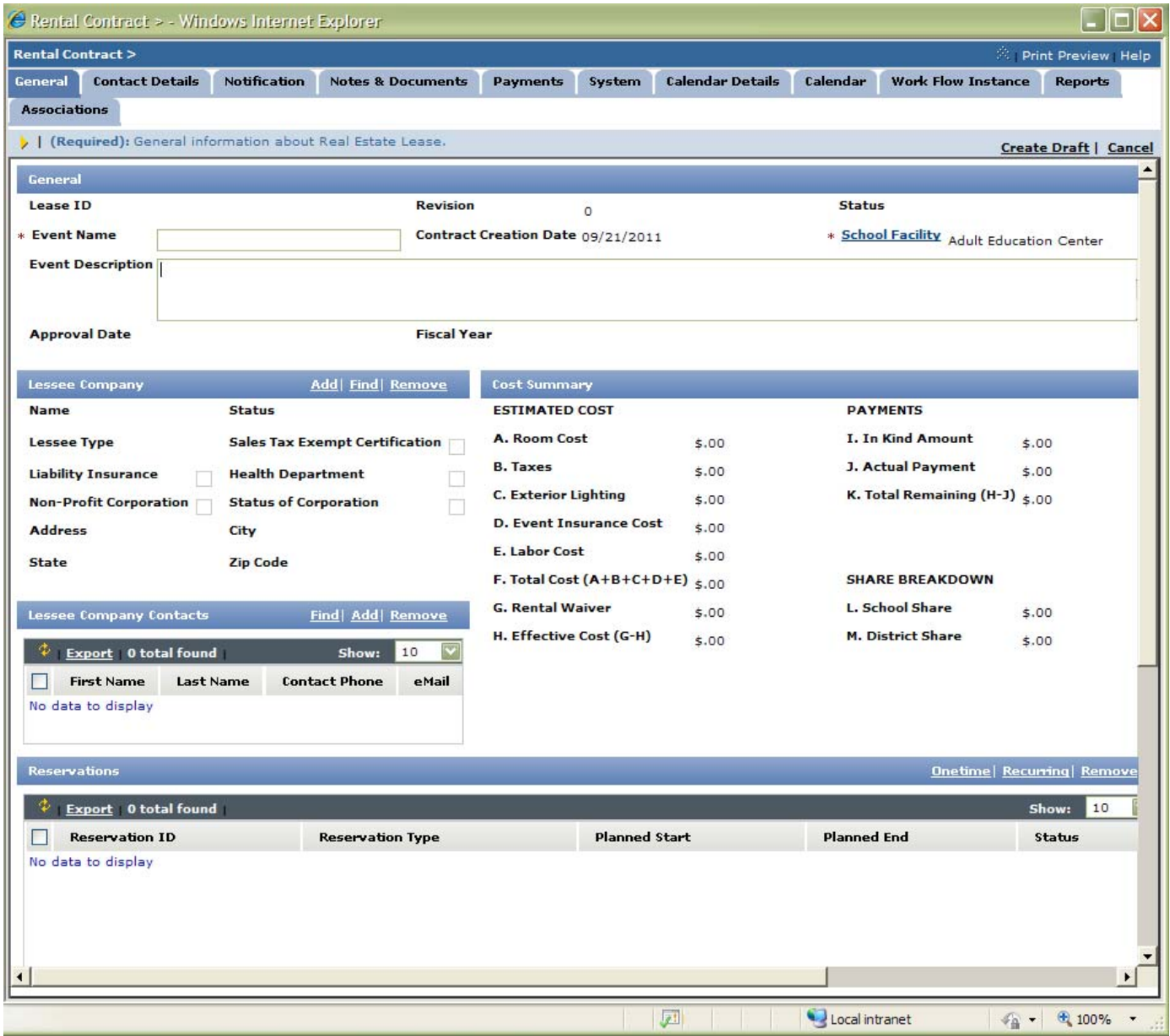
“How to Create a Lease using a Recurring Reservation”

BEFORE you begin, make sure that you have **ALL** of the rooms you will need for the lease set-up as “Reservable” in the system. If the rooms are **NOT** set-up, please see the “*How to Create Reservable Rooms*” user guide.

1. On your portal page, click on “**Rental Contract**” link in the “**Quick Add**” section to open new contract:



2. You will see this window open up:

A screenshot of a web browser window titled 'Rental Contract > - Windows Internet Explorer'. The browser shows a web application with a navigation bar at the top containing tabs for 'General', 'Contact Details', 'Notification', 'Notes & Documents', 'Payments', 'System', 'Calendar Details', 'Calendar', 'Work Flow Instance', and 'Reports'. Below the navigation bar is a section titled 'Associations' with a sub-section '(Required): General information about Real Estate Lease.' and buttons for 'Create Draft' and 'Cancel'. The main content area is divided into several sections: 'General' with fields for Lease ID, Revision (0), Status, Event Name, Contract Creation Date (09/21/2011), Event Description, Approval Date, and Fiscal Year; 'Lessee Company' with fields for Name, Status, Lessee Type, Sales Tax Exempt Certification, Liability Insurance, Health Department, Non-Profit Corporation, Status of Corporation, Address, City, State, and Zip Code; 'Cost Summary' with a table of costs (A-H) and 'PAYMENTS' (I-K) and 'SHARE BREAKDOWN' (L-M); 'Lessee Company Contacts' with a table of contacts (First Name, Last Name, Contact Phone, eMail) and an 'Export' button; and 'Reservations' with a table of reservations (Reservation ID, Reservation Type, Planned Start, Planned End, Status) and an 'Export' button. The browser's status bar at the bottom shows 'Local intranet' and a zoom level of 100%.

“How to Create a Lease using a Recurring Reservation”

3. First, enter “Event Name” for the event, then enter the “Event Description”
You will notice that the “Contract Creation Date” defaults to the day you created the contract. It is system-generated, you don’t have to enter the date.

General

Lease ID 1 Revision 0

* Event Name Sample Recurring Event Contract Creation Date 09/21/2011

Event Description This event runs every Sat a.m. from 9-1 p.m.

System generates date contract is entered into TRIRIGA

4. After you have filled in the Event Name, the Event Description and then be sure to click on “Create Draft” and you will see that the system automatically assigns a Lease ID number. If you don’t see the number, click on “Save” or “Home” to refresh the page.

(Required): General information about Real Estate Lease. Submit for Approval | Save | Save & Close | Cancel

General

Lease ID LID - 2012 - 0331 - 1002 Revision 0 Status Draft

* Event Name Sample Recurring Event Contract Creation Date 09/21/2011 * School Facility Adult Education Center

Event Description This event runs every Sat a.m. from 9-1 p.m.

Approval Date Fiscal Year 2012

5. Now you will have to select a Lessee Company. First, click on “Find” to determine whether or not the Lessee Company is already in the system. and a window with all Lessee Companies in the database opens up. (Search for your Lessee Company, if it doesn’t exist, please read handout that explains how to create a Lessee company.) It looks like this:

Lessee Company Add Find Remove Cost Summary

Name Status ESTIMATED COST PAYMENTS

Lessee Type

Liability Insurance

Non-Profit Corporation

Address

State

Lessee Company Contacts

Export 0 total found

First Name Last Name

No data to display

Reservations

Export 0 total found

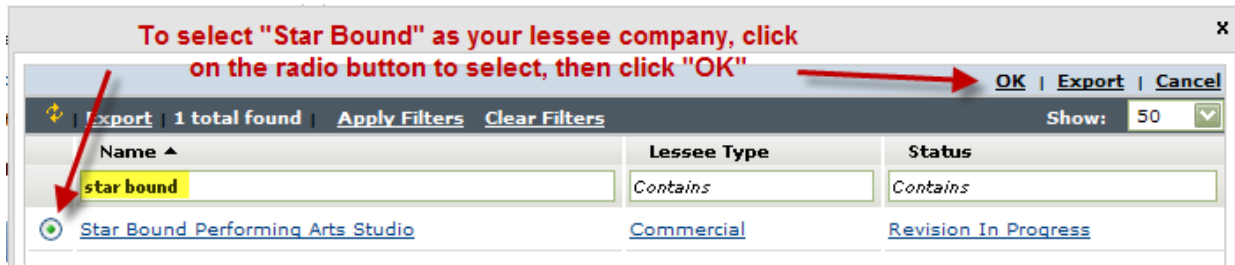
Reservation ID

1 / 2 Export 57 total found Apply Filters Clear Filters Show: 50

Name	Lessee Type	Status
Contains	Contains	Contains
ABC LEARNING ACADEMY, INC.	Commercial	Active
Acme Academics, LLC	Commercial	Revision In Progress
Acreege Baptist Church	Non-Profit (Non-Taxable)	Active
Advanced Learning Centers, Inc.	Commercial	Revision In Progress
Body Wellness Fitness & Management, LLC	Commercial	Active
Cayo Consulting	Commercial	Revision In Progress
Corozal Catering	Non-Profit (Non-Taxable)	Revision In Progress
Country Fair Productions	Non-Profit (Non-Taxable)	Draft
Creat Lessee Co test	Commercial	Revision In Progress

“How to Create a Lease using a Recurring Reservation”

- We searched for “**Star Bound Performing Arts Studio**” by typing “star bound” into the search box and pressing “**Enter**” on the keyboard. If that’s correct, select the **Lessee Company** by clicking the “radio button” (you’ll see a green dot), then click **OK**.



You can see that **the system automatically populates the lease with all of the Lessee Company information** (including any **Lessee Company Contact** information that has been added to that record as well):



- Are now ready to add your reservations. Please make sure that you have **all reservation days, times and locations** in front of you **BEFORE** you start the process. It is helpful to work with a calendar because then you can see what type of recurring pattern you can use. In the recurring section, you can pick “**Daily**” “**Weekly**” or “**Monthly**” We will now add a “**Recurring**” reservation.

- In the Reservations section, click on **Recurring**



“How to Create a Lease using a Recurring Reservation”

A new **Space Rental Reservation** window will open. We will be working in a “U” pattern.

Recur Reservation > 1005317 Print Preview | Help

Required Select the Recurrence pattern for this Reservation. When complete select the 'Next' action. **Complete** | Cancel

Event Info START

* Reservation Start Date: 09/21/2011 15:10:11 ➔ * Meeting Duration: 1 Hour(s)

FISH Facility Number: 16 ➔ School Facility: Adult Education Center

Select an Occurrence Type

* Recurrence Pattern Type: DAILY WEEKLY MONTHLY YEARLY ➔

Select the Reservation End Criteria: End After End Date ➔

Room Availability ➔

Building	Floor	Space	Rate Type	Area	Con Rate
1	01	112	Classroom	706 square-feet	
1	01	101A	Auditorium 250+	420 square-feet	
1	01	101	Cafeteria (High)	2299 square-feet	
5	01	101	Comp/Tech Lab	726 square-feet	

Labor Rate ➔

Hourly Rate	Name	Status
\$35.00	Custodial FP	Active
\$33.00	Custodian-1	Active
\$35.00	Food Serv Asst-1	Active
\$48.00	Food Serv Mgr	Active
\$50.00	School Police-1	Active
\$40.00	Theatre Tech	Active
\$40.00	Lease Coor	Active
\$35.00	ITSA	Active
\$40.00	STST	Active
\$16.00	Asst. Theatre Tech-1	Active

- The time defaults to when you actually enter the lease into the system. To begin, **select the time FIRST** then click on the start date. So, I have picked 9 a.m. on the 24th of September.

Event Info

* Reservation Start Date: 09/24/2011 09:00:00

FISH Facility Number: []

Select an Occurrence Type: []

Pick time first, then click on date and calendar will close

Room Availability

Export | 4 total found | Clear Filters

September 2011

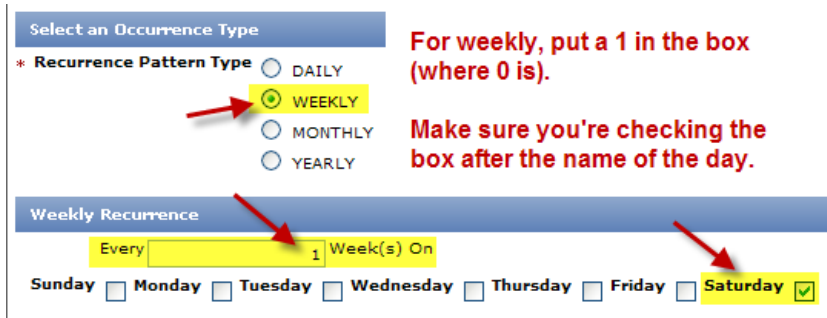
S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Today

Time: 09:00:00

“How to Create a Lease using a Recurring Reservation”

10. Then we selected a “Recurrence Pattern”



Select an Occurrence Type

* Recurrence Pattern Type DAILY WEEKLY MONTHLY YEARLY

For weekly, put a 1 in the box (where 0 is).

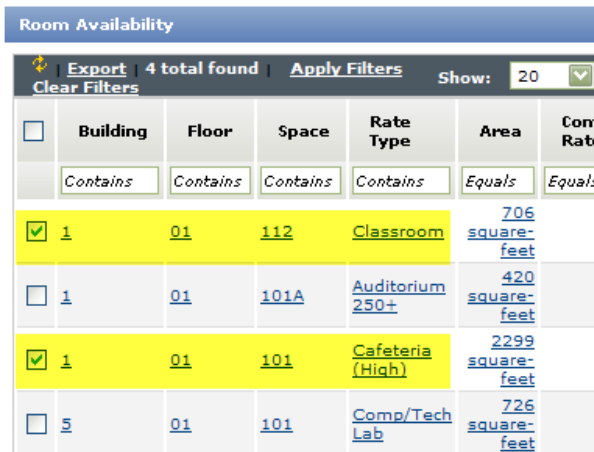
Make sure you're checking the box after the name of the day.

Weekly Recurrence

Every 1 Week(s) On

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

11. Next, select the rooms needed for this reservation. You can select as many rooms as you have configured in the system. **Select each room location by placing a checkmark in the box in front of each space.**



<input type="checkbox"/>	Building	Floor	Space	Rate Type	Area	Cor. Rate
<input checked="" type="checkbox"/>	1	01	112	Classroom	706 square-feet	
<input type="checkbox"/>	1	01	101A	Auditorium 250+	420 square-feet	
<input checked="" type="checkbox"/>	1	01	101	Cafeteria (High)	2299 square-feet	
<input type="checkbox"/>	5	01	101	Comp/Tech Lab	726 square-feet	

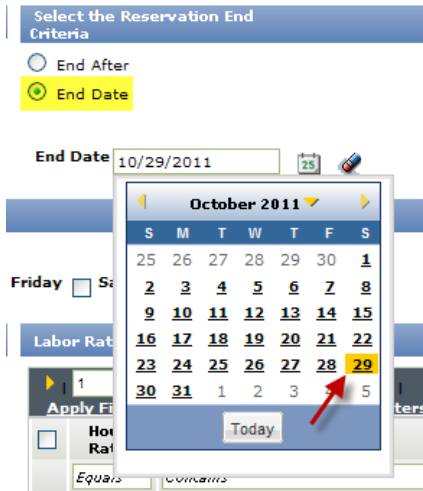
12. If you need to **add labor**, you can select the labor as well. If not, leave this blank.



<input type="checkbox"/>	Hourly Rate	Name	Status
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	\$33.00	Custodian-1	Active
<input type="checkbox"/>	\$35.00	Custodial FP	Active
<input type="checkbox"/>	\$35.00	Food Serv Asst-1	Active
<input type="checkbox"/>	\$48.00	Food Serv Mgr	Active
<input type="checkbox"/>	\$50.00	School Police-1	Active
<input type="checkbox"/>	\$40.00	Theatre Tech	Active

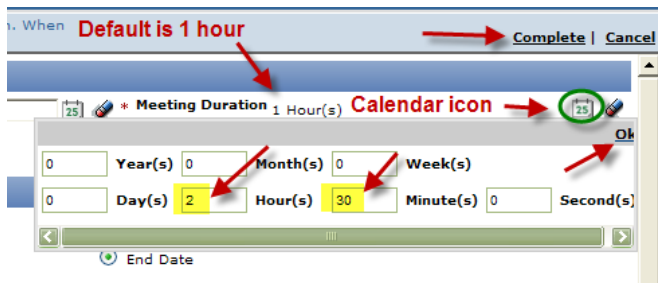
“How to Create a Lease using a Recurring Reservation”

13. Next, to complete the process, select the radio button next to “End Date” and then pick the last date of the recurring reservation. Once you click the date on the calendar, the calendar pop-up will close:



14. To change the duration of the reservation, click on the calendar icon and a pop-up window with **Days**, **Hours**, and **Minutes** opens up. To change the time, click where the default 1 shows up in the Hours box and change it. Here the duration has been changed from **1 hour** to **2 hours and 30 mins**.

Don't forget to click **OK** in the upper right-hand corner of the duration pop-up window.



15. Check the recurring information one last time, then click **Complete**.



16. This is what your Reservations Section should look like:

Reservations

Export | 7 total found

Minus 1 reservation for "Recurring" which doesn't count. Total of 6 reservations for this lease.

Reservation ID	Reservation Type	Planned Start	Planned End
1053944	Important: Recurring	09/21/2011 15:10:12	09/21/2011 16:10:12
1053945	Onetime	10/29/2011 09:00:00	10/29/2011 11:30:00
1053946	Onetime	10/08/2011 09:00:00	10/08/2011 11:30:00
1053947	Onetime	10/01/2011 09:00:00	10/01/2011 11:30:00
1053948	Onetime	09/24/2011 09:00:00	09/24/2011 11:30:00
1053949	Onetime	10/22/2011 09:00:00	10/22/2011 11:30:00
1053950	Onetime	10/15/2011 09:00:00	10/15/2011 11:30:00

DO NOT DELETE THIS ROW!

Recurring just means that the recurring function was used. It does not add anything to the cost.

“How to Create a Lease using a Recurring Reservation”

17. Hover your mouse over the header for any row in order to sort ascending or descending:

Planned Start ▲
09/21/2011 15:10:12
09/24/2011 09:00:00
10/01/2011 09:00:00
10/08/2011 09:00:00
10/15/2011 09:00:00
10/22/2011 09:00:00
10/29/2011 09:00:00

To sort by date, click on "Planned Start"
(Click again to sort A-Z or Z-A)

18. Same with “Locations & Costs” – sort by **Planned Start** or **Planned End**, or by **Space** or by **Reservation ID**:

Reservation ID ▲	Space ▲	Planned Start ▲	Planned End
1053945	101	09/24/2011 09:00:00	09/24/2011 11:30:00
1053945	101	09/24/2011 09:00:00	09/24/2011 11:30:00
1053946	101	10/01/2011 09:00:00	10/01/2011 11:30:00
1053946	101	10/01/2011 09:00:00	10/01/2011 11:30:00
1053947	101	10/08/2011 09:00:00	10/08/2011 11:30:00
1053947	101	10/08/2011 09:00:00	10/08/2011 11:30:00
1053948	112	10/15/2011 09:00:00	10/15/2011 11:30:00

19. To change or add Labor to a lease, simply click on any **\$0.00** field under the Total Labor Cost column:

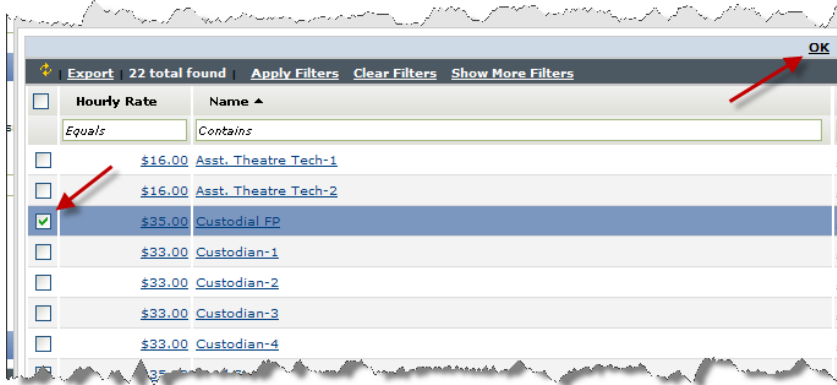
Space Cost	Labor Cost	Total W.
\$0.00	\$0.00	
\$0.00	\$82.50	
\$0.00	\$82.50	
\$0.00	\$0.00	
\$0.00	\$82.50	
\$0.00	\$0.00	

A new window called “**Rental Resource**” opens up with a section called “**Labor**” toward the bottom of the window. Click on the “**Add**” link:

The screenshot shows the 'Rental Resource' window for reservation ID 1053945. The 'Costs' section includes a table with columns for COST ITEM, RATE, and TOTALS. The 'Labor' row shows a rate of \$0.00. A red box highlights the 'Add' button in the 'Labor' section. Another red box highlights the 'Add Remove' button and the 'Total Cost' field in the 'TOTALS' section. The 'Total Cost' field shows a value of \$0.00.

“How to Create a Lease using a Recurring Reservation”

20. The window will display all officially approved job types that can be added to a lease. Select the labor that you need and then click OK.



21. Make your labor selections and then click **OK** – you will then see the Labor section become populated with the labor titles, the rates and the **Planned Start** and **Planned End** (in Calendar format), which you can edit if different labor types are working during different times:

A screenshot of the 'Rental Resource > 1668992' window. The 'General' tab is active, showing 'ID: 1668992', 'Status: Active', 'Planned Start: 09/24/2011 09:00:00', and 'Planned End: 09/24/2011 11:30:00'. A red arrow points to the 'Save & Close' button. Below is a 'Costs' section with a table of items and their costs. The 'Labor' section at the bottom shows a table with one row for 'Custodial FP' with a 'Planned Start' of '09/24/2011 08:00:00' and a 'Planned End' of '09/24/2011 12:30:00', both circled in red. A red text box below the table states: 'Start time and end time have been changed to add an extra hour to the total labor time for the Custodial Fore Person.'

COST ITEM	HOURS	RATE	TOTALS	WAIVER
Space Type Classroom	2.5	\$40.00	A. Space Cost	\$100.00
Tax		6	B. Total Taxes (A * Tax Rate)	\$6.00
Exterior Lighting	0	\$0.00	C. Exterior Lighting Cost	\$0.00
			D. Event Insurance Cost	\$0.00
			E. Total Labor Cost	\$157.50
			F. Total Rental Cost (A+B+C+D+E)	\$263.50
			H. Effective Rental Cost (F-G)	\$263.50
			G.Total Waiver	\$0.00

Position	Rate	Planned Start	Planned End	Working Hours	Total Cost
Custodial FP	\$35.00	09/24/2011 08:00:00	09/24/2011 12:30:00	4 Hour(s) 30 Minute(s)	\$157.50

Start time and end time have been changed to add an extra hour to the total labor time for the Custodial Fore Person.

Editing labor times should be done by inserting cursor in to displayed date and times and making changes on the screen. Make sure you click “**Save**” after each change. Once you have completed the labor, click “**Save & Close**” for each window until you find yourself back at the Rental Contract page:

“How to Create a Lease using a Recurring Reservation”

Rental Contract > Sample Recurring Event, 1002171

General | Contact Details | Notification | Notes & Documents | Payments | System | Calendar Details | Calendar | Work Flow Instance | Reports | Associations

(Required): General information about Real Estate Lease. Submit for Approval | Save | Save & Close | Cancel

Approval Date: Fiscal Year: 2012

Lessee Company				Add Find Remove		Status		Revision In Progress	
Name	Star Bound Performing Arts Studio	Status	Commercial	Sales Tax Exempt Certification	<input type="checkbox"/>	Health Department	<input type="checkbox"/>	Status of Corporation	<input type="checkbox"/>
Address	5440 W. Sample Road	City	Coral Springs	Zip Code	33067				

ESTIMATED COST		PAYMENTS	
A. Room Cost	\$0.00	I. In Kind Amount	\$0.00
B. Taxes	\$0.00	J. Actual Payment	\$0.00
C. Exterior Lighting	\$0.00	K. Total Remaining (H-J)	\$0.00
D. Event Insurance Cost	\$0.00		
E. Labor Cost	\$0.00		
F. Total Cost (A+B+C+D+E)	\$0.00		
G. Rental Waiver	\$0.00		
H. Effective Cost (G-H)	\$0.00		

Lessee Company Contacts				Find Add Remove	
Export	1 total found	Show:	10		
First Name	Last Name	Contact Phone	eMail		
Jennifer	Massa	954-876-1759	JENNIFERMASSA@comcast.net		

Reservations						Onetime Recurring Remove	
Export	7 total found	Show:	10				
Reservation ID	Reservation Type	Planned Start	Planned End	Status			
1053944	Recurring	09/21/2011 15:10:12	09/21/2011 16:10:12	Draft			
1053948	Onetime	09/24/2011 09:00:00	09/24/2011 11:30:00	Draft			
1053947	Onetime	10/01/2011 09:00:00	10/01/2011 11:30:00	Draft			
1053946	Onetime	10/08/2011 09:00:00	10/08/2011 11:30:00	Draft			
1053950	Onetime	10/15/2011 09:00:00	10/15/2011 11:30:00	Draft			
1053949	Onetime	10/22/2011 09:00:00	10/22/2011 11:30:00	Draft			
1053945	Onetime	10/29/2011 09:00:00	10/29/2011 11:30:00	Draft			

Locations & Costs											
Export	12 total found	Show:	10								
Reservation ID	Space	Planned Start	Planned End	Room Cost	Ext Lighting Cost	Total Taxes	Insurance Cost	Labor Cost	Total Waiver	Effective Cost	
1053948	112	09/24/2011 09:00:00	09/24/2011 11:30:00	\$100.00	\$0.00	\$6.00	\$0.00	\$157.50	\$0.00	\$263.50	
1053948	101	09/24/2011 09:00:00	09/24/2011 11:30:00	\$250.00	\$0.00	\$15.00	\$0.00	\$82.50	\$0.00	\$347.50	
1053947	101	10/01/2011 09:00:00	10/01/2011 11:30:00	\$250.00	\$0.00	\$15.00	\$0.00	\$82.50	\$0.00	\$347.50	
1053947	112	10/01/2011 09:00:00	10/01/2011 11:30:00	\$100.00	\$0.00	\$6.00	\$0.00	\$0.00	\$0.00	\$106.00	
1053946	101	10/08/2011 09:00:00	10/08/2011 11:30:00	\$250.00	\$0.00	\$15.00	\$0.00	\$82.50	\$0.00	\$347.50	
1053946	112	10/08/2011 09:00:00	10/08/2011 11:30:00	\$100.00	\$0.00	\$6.00	\$0.00	\$0.00	\$0.00	\$106.00	
1053950	101	10/15/2011 09:00:00	10/15/2011 11:30:00	\$250.00	\$0.00	\$15.00	\$0.00	\$82.50	\$0.00	\$347.50	

22. If your Lessee Company documents are in order and you have completed all reservations, you are now ready to click “Submit for Approval” and you will see that the status changes to “Review in Progress”:

Rental Contract > Sample Recurring Event, 1002171

General | Contact Details | Notification | Notes & Documents | Payments | System | Calendar Details | Calendar | Work Flow Instance | Reports | Associations

(Required): General information about Real Estate Lease. Save | Save & Close | Cancel

General

Lease ID: LID - 2012 - 0331 - 1002 Revision: 0 Status: Review In Progress

* Event Name: Sample Recurring Event Contract Creation Date: 09/21/2011 * School Facility: Adult Education Center

Event Description: This event runs every Sat a.m. from 9-1 p.m.

Approval Date: Fiscal Year: 2012

Lessee Company				Add Find Remove		Status		Revision In Progress	
Name	Star Bound Performing Arts Studio	Status	Commercial	Sales Tax Exempt Certification	<input type="checkbox"/>	Health Department	<input type="checkbox"/>	Status of Corporation	<input type="checkbox"/>

ESTIMATED COST		PAYMENTS	
A. Room Cost	\$2,100.00	I. In Kind Amount	\$0.00
B. Taxes	\$126.00	J. Actual Payment	\$0.00
C. Exterior Lighting	\$0.00	K. Total Remaining (H-J)	\$2,878.50

“How to Create a Lease using a Recurring Reservation”

23. Finally, to print the lease, click the “Reports” tab on your Rental Contract page. It takes a few moments for the system to generate the lease. You should see the screen below. Follow the steps to print the lease or save it as a pdf to your computer.

1. To print the lease, click on the printer icon. A (blue) window pops up that says, "Print to PDF".

2. Click on "Export" and the (tan) File Download window pops up

3. You can open the lease as a PDF and print it or save it to your computer

DIRECTIONS: Please review all information for accuracy and have Lessee, Principal and Witness sign and date below. After a lease agreement has been completed and after all signatures have been obtained, make copies for your school files, the Lessee and Finance. Send the *signed*, original lease to the Real Estate Services Department.

THIS AGREEMENT made on 09/21/2011 as Lessor, and Star Bound Performing as Lessee, and ALM BEACH COUNTY, Inc. as the following address:

Address: 5440 W. ...
 State: FL

Exhibits provided by:
 Liability
 Non-Pr...

Event Name: ...
 Event Description: ...

Contract Creation Date: 09/21/2011

Room Cost	Ext. Lighting Cost	Total Taxes	Insurance Cost	Labor Cost	Total Waiver	Effective Cost
\$ 2,100.00	\$ 0.00	\$ 126.00	\$ 0.00	\$ 652.50	\$ 0.00	\$ 2,878.50

That by signing this agreement, Lessor does hereby lease unto the Lessee and Lessee takes and hires from Lessor its premises for the

24. **One last note:** Each year, Mr. Brian Marinan (from Risk Management) speaks to Leasing Coordinators each year to explain what to do if the Lessee will not be providing their own insurance for the rental contract.

If this is the case, the Lessee **must purchase insurance from the School District through Risk Management** (Liquid Office Form **PBSD 1915 Vendors Liability Insurance Report**). The leasing coordinator will use Form **PBSD 1915** to generate a quote for a lease and will then **add that dollar amount** into the “**Event Insurance Cost**” field in the “**Costs**” section. (Please contact Real Estate or Risk Management regarding questions about this form.)

“How to Create a Lease using a Recurring Reservation”

Take the amount generated by filling out the form where it says **\$.00** and type in the amount as in below on the left. The final “**Cost Summary**” section should look something like this on the right:

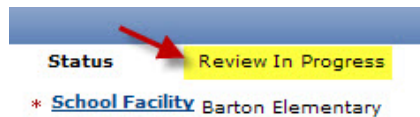
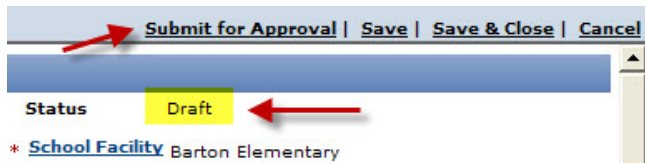
TOTALS	
A. Space Cost	\$75.00
B. Total Taxes (A * Tax Rate)	\$.00
C. Exterior Lighting Cost	\$18.00
D. Event Insurance Cost	\$168.53
E. Total Labor Cost	\$326.00
F. Total Rental Cost (A+B+C+D+E)	\$419.00
H. Effective Rental Cost (F-G)	\$419.00

Cost Summary			
ESTIMATED COST		PAYMENTS	
A. Room Cost	\$390.00	I. In Kind Amount	\$.00
B. Taxes	\$.00	J. Actual Payment	\$.00
C. Exterior Lighting	\$18.00	K. Total Remaining (H-J)	\$935.53
D. Event Insurance Cost	\$168.53		
E. Labor Cost	\$359.00		
F. Total Cost (A+B+C+D+E)	\$935.53		
G. Rental Waiver	\$.00		
H. Effective Cost (G-H)	\$935.53		
		SHARE BREAKDOWN	
		L. School Share	\$253.50
		M. District Share	\$154.50

Once the correct amount has been entered, click on the “**General**” tab and then “**Save & Close**”

The School Share and District Share have been calculated to assist staff in determining the \$\$ amounts for the School to keep as well as what needs to be remitted to Accounting Services.

14. You should now go back over the lease and check to ensure that everything is correct. If so, click on “**Submit for Approval**” and your Principal will get a **notification*** that there is a leasing pending for Review.



** If your principal needs assistance with the lease approval process, please see the “**Quick Start Guide for Principals,**” which will provide a step-by-step procedure for Approving or Returning leases.*