



Blenheim Property Valuation - User Manual

This manual sets out advice on using the Blenheim Property Valuation website.

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1 Introduction

- 1.1.1 This manual is aid Users of the Blenheim Property Valuation ('BPV') system. It sets out the logon process, use of the system and how to find further help online. The system is based online and can be found at: www.headsquared.co.uk/blenheim.

2 Overview of BPV

- 2.1.1 BPV is a web-based Estate Valuation tool. It allows users to value individual properties within an estate, and to maintain a total value for a whole estate.
- 2.1.2 BPV captures property information including land information (such as acreage/number of hectares), estates in the land (leases, licences, etc.), reference codes, and valuations assigned to the land (including date of valuation, basis of valuation, commentary on valuations and the like).
- 2.1.3 Utilising this information the system creates global valuations for the estate in the form of a report, including past valuations, breakdown by land type, etc. This report interface includes relevant Charts to help better identify trends.

3 How to use BPV

- 3.1.1 To use Blenheim Property Valuation please use your internet browser to navigate to the following page: www.headsquared.co.uk/blenheim.

3.2 Logging On / Logging Off

Logging onto the system

- 3.2.1 To logon to the system:
- Go to the BPV home page;
 - Go to the logon page (by following the link at the top of the screen or on the left hand navigation bar;
 - Enter in your email address;
 - Enter your password; and
 - Click 'Login' or press the return key.

Forgotten password

- 3.2.2 If you have forgotten your password, click on the link below the login interface labelled 'Forgotten Password'. This will reset your password and an email will be sent to your email address with your new temporary password.
- 3.2.3 Once you have logged on with your new temporary details you can change your password to a more memorable one in your account panel (please see the section labelled 'Changing Password' below).

Changing Password

- 3.2.4 If you wish to change your password, please go to your Account control panel (a link to which can be found at the top right of the screen). Once in your Account, select the 'Change Password' link on the left hand side of the screen and complete the form to activate the password change.

Logging Off

- 3.2.5 To ensure the security of your session, it is recommended that you logoff whenever you leave your computer unattended or if you have finished using the website. To logoff please click on 'Logoff' at the top of the screen.
- 3.2.6 Your session will automatically be logged off if no action has been taken for a significant period of time.

3.3 Navigating the Website

- 3.3.1 There are a number of different areas of the website set out across the horizontal navigation bar. Click on the relevant navigation bar entry to access a part of the website.

- 3.3.2 Once within a section of the website you will see that the vertical navigation bar brings up new pages relevant to the section (so for example, when you enter the 'Properties' section you are given the option to access):

- Properties
- Edit Lease Types
- Edit Repairs Clauses
- Edit Tenants

- 3.3.3 The purpose of the different sections of the website are set out below:

Home:

- Home page;
- Logon/logoff, etc.

Valuations:

- Stores valuation information relating to a Property (the actual valuation figure, notes on how this was reached, etc.)
- Creates new valuation periods (eg. June 2009 valuations)
- Redefines valuation categories (residential, agricultural, etc.)

Properties:

- Information which identifies a Property (such as address, reference number, etc.)
- Information on leases relating to the Property
- An updatable list of the different Repairs clauses you can select

- Information of Tenants who have a lease in one of the Properties

Reports:

- Displays the output from the database (for instance it shows the total valuation of the different property types (agricultural, residential, etc.)).

Contact Us:

- Details to contact Head Squared Software.

About:

- Release notes on the System.

3.4 Viewing Data

- 3.4.1 The information provided will often be shown in a table (as shown on Figure 1 below).

Editing Data / Viewing Extra Data

- 3.4.2 By clicking on 'Edit', 'View', 'More' you will taken to a new page where further information can be viewed and changes can be made to the record.

Adding New Data

- 3.4.3 To add a new record to the table click the button below the table labelled "New", "Add New", etc. (labelled (H) on Figure 1 below). This will take you to a new page where data can be entered.

Multiple Pages of Data

- 3.4.4 Where there are more entries than can be shown on a single page, a selection of links to each of the pages will be shown (labelled (G) on Figure 1 below). This is known as 'pagination' and works in the same way as search engines such as Google.

3.5 Sorting Data

Searching

- 3.5.1 You may be able to search for a specific record within a table by using the search boxes on the left of the screen. These are labelled (D) on Figure 1 below.

Filtering Lists

- 3.5.2 To filter the valuations data by the group in which a property falls, go to the 'Valautions' section of the website and select the group you would like to value from the drop-down list (labelled (A) on Figure 1 below). This will show only properties within this group

Re-organising Lists (Sorting Data)

3.5.3 To re-organise a list alphabetically by a column, click on the column header. This function is available where ever the column header is underlined (please see (B) on Figure 1 below).

3.6 How to get Help

3.6.1 To open the online help files please click on 'Help' at the top of the screen or alternatively type a short word or phrase into the search bar (which is labelled (c) on Figure 1).

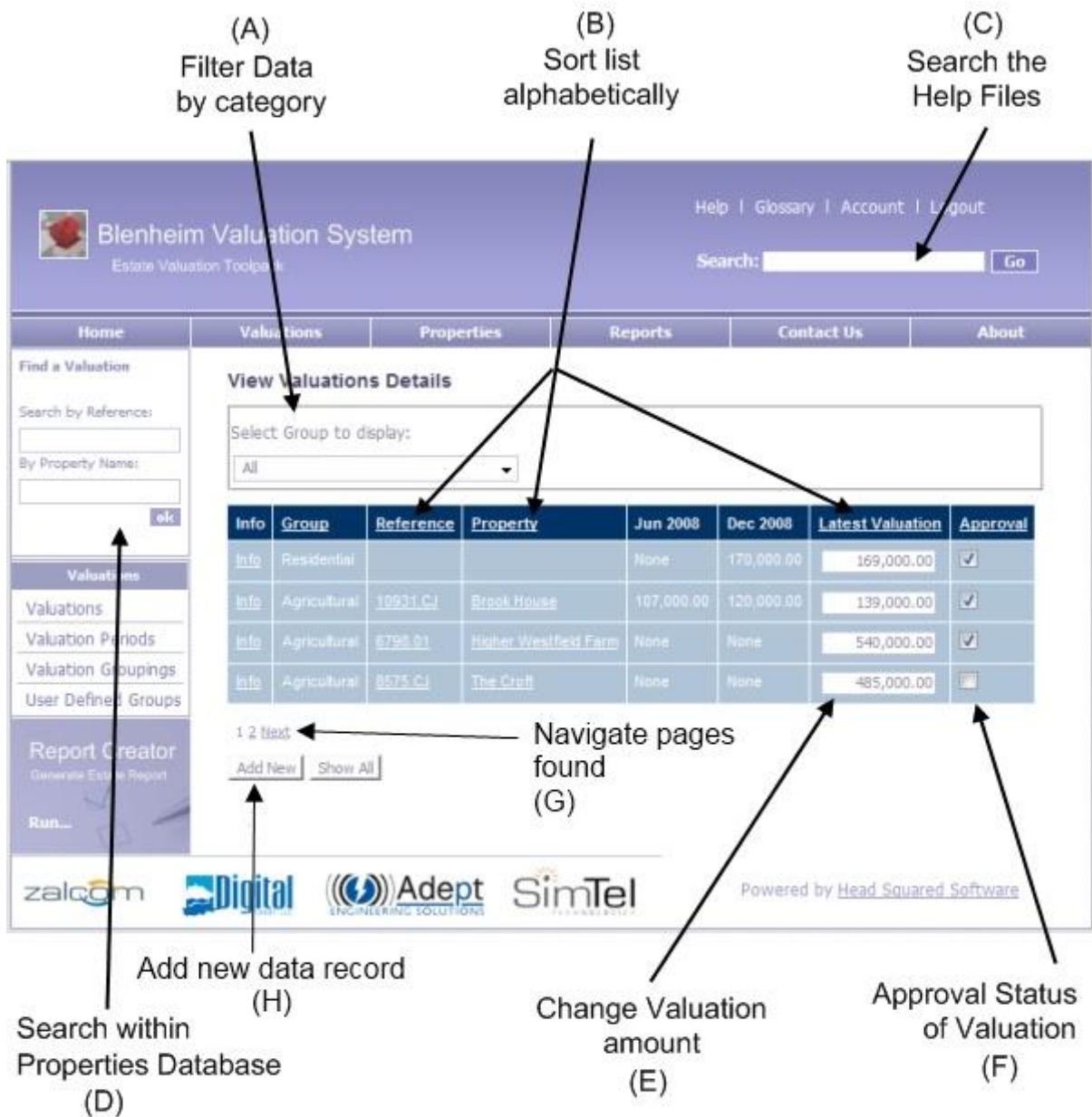


Figure 1 - Annotated Layout of Valuations User Interface

4 Properties

4.1.1 BPV stores information relating to a property such as

- Address;
- property reference (where appropriate);
- tenancies affecting the land and basic tenant details;
- Name;
- Reference number;

- Acquisition costs; and
- Other details.

4.1.2 Properties are categorised to allow a breakdown of the estate valuations by user-defined type, allowing users to generate information appropriate to their needs.

4.1.3 The Property Information page allows users to update information relating to a property such as:

4.2 Disposal of Property from Estate

4.2.1 The disposals data is to be used when a property leaves an estate. Failure to complete these details will result in the property still being considered and valued as part of the estate.

5 Leases

5.1.1 The system stores multiple leases which relate to a given property entry in the database.

5.1.2 To add a new lease to a property or to edit an existing lease:

- Add the Tenant to the tenants database (if not already included) (please see section 6 below);
- Go to “Properties” section of website;
- Find the property you wish to add the lease to;
- Select “Edit” for the property;
- Go to the “Leases” tab for the property;
- Select “Edit” for the lease to modify or click “Add Lease”; and
- Complete the form as appropriate.

6 Tenants

6.1.1 The system stores all the tenants who have agreed leases on the estate (this helps stop the need to enter the same details many times).

6.1.2 To add a new tenant or edit the details of an existing tenant:

- Go to “Properties” section of website;
- Select “Edit Tenants” from navigation bar on the left of the screen;
- Select the tenant to edit from the list; or
- Click “Add Tenant”; and
- Complete the form as appropriate.

7 Valuations

7.1.1 Valuations can be generated using a multiplier of previous valuations to allow quick and easy batch updates of large numbers of properties. Individual valuations can then be changed to give an accurate valuation for the entire estate.

7.2 Creating Valuations

7.2.1 Before creating a new Valuation Period, ensure all property details are correct as of the valuation date and that all properties which have joined and left the estate have been correctly recorded as such on the website.

7.2.2 Once all property details are correct, to create a new set of valuations go to the Valuations section of the website, click on the Valuations Period link on the left hand navigation bar and click "Add New" Valuation Period. This will automatically create a new valuation record for every active property in the estate and will set a default valuation figure based on your Default Valuations input figure (for further details please see Section 7.3 below).

7.3 Default Valuations

7.3.1 Default valuations are the initial valuation figure for a property in a newly created valuation period. This sets a figure which can be changed later, but allows the creation of many records at a standard valuation amount based on the property's value in the last valuation period. If the default valuation is:

- 1.00 the valuation will be the same as in the previous period;
- if it is 1.05 each property's default valuation will be 5% higher;
- if the value is 0.90 each property's default valuation will be 10% lower.

7.3.2 Where a valuation is created it will be rounded to the nearest pound. Please see the example below:

- Dec 2009 Valuation: £15,869
- Increase in value: 2.5%
- Multiplier: 1.025
- June 2010 Valuation: £16,265.725 (unrounded)
- Actual June 2010 Valuation £16,266

7.4 Approvals Process

7.4.1 The valuations approval process is set up to enable Supervisor's to give their approval to a valuation. This approvals process ensures that valuations have been checked by a Supervisor to ensure it is accurate prior to submission to the client.

7.4.2 Once a Supervisor has approved a valuation, any further changes made by staff who have not been appointed as a Supervisor, will invalidate the original approval.

7.4.3 Therefore, changes made after approval by non-Supervisors require a fresh Supervisor approval to ensure no new errors have been introduced in the valuation data.

7.5 Finding Specific Records

Search for a Property Valuation

- 7.5.1 You are able to search for a current valuation record within in the “Valuations” section of the website by adding the property name and/or property reference to the search boxes on the left of the screen. These are labelled (D) on Figure 1 above.

Select a Group of Properties

- 7.5.2 To filter the valuations data by the group in which a property falls, go to the ‘Valuations’ section of the website and select the group you would like to value from the drop-down list (labelled (A) on Figure 1 above). This will show only properties within this group

8 Estate Groups (Valuation Groups)

- 8.1.1 Estates are broken up into groups (such as Residential, Agricultural, etc.). This splits the estate up for valuation purposes so the different elements can be valued in addition to the whole.

9 User-Defined Groups

- 9.1.1 To evaluate the estate using grouping other than the main Valuation Groups, users can set up their own classification system. To edit the User-Defined Groups, go to the ‘Valuations’ section of the website, and select ‘User-Defined Groups’ from the side menu.

10 Reports

10.1 Creating Reports

- 10.1.1 ‘Reports’ gather together data from the database to create a user-friendly estate review tool.
- 10.1.2 To create a report, go to the ‘Reports’ section of the website. There are a number of different reports available on the side menu. Where a drop-down list appears above a report, this allows you to show different versions of a report. Select the version you wish to view.

10.2 Exporting Reports

- 10.2.1 To export the contents of a report to an Excel spreadsheet: click on the link above the report details on BVS (n.b. exporting reports is not available for all reports). This will automatically download every property which falls within the report. The export may contain more data than is shown in the web version.

11 System Specification

11.1.1 The software package will be written based on the system requirements set out below:

Computer/processor Computer with minimum of Pentium III or higher recommended

Memory 128 MB of RAM plus an additional 8 MB of RAM for Excel

Hard disk None

Operating system Windows XP or later.

Display Super VGA (800 × 600) or higher-resolution monitor with 256 colours

Browsers (where required) Internet Explorer 5 or later, Mozilla Firefox 3 or later.

Head Squared recommends Mozilla Firefox 3.5 for the best user experience with BPV.

12 Glossary of Terms

BVS Blenheim Valuation System

13 About Head Squared Software

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