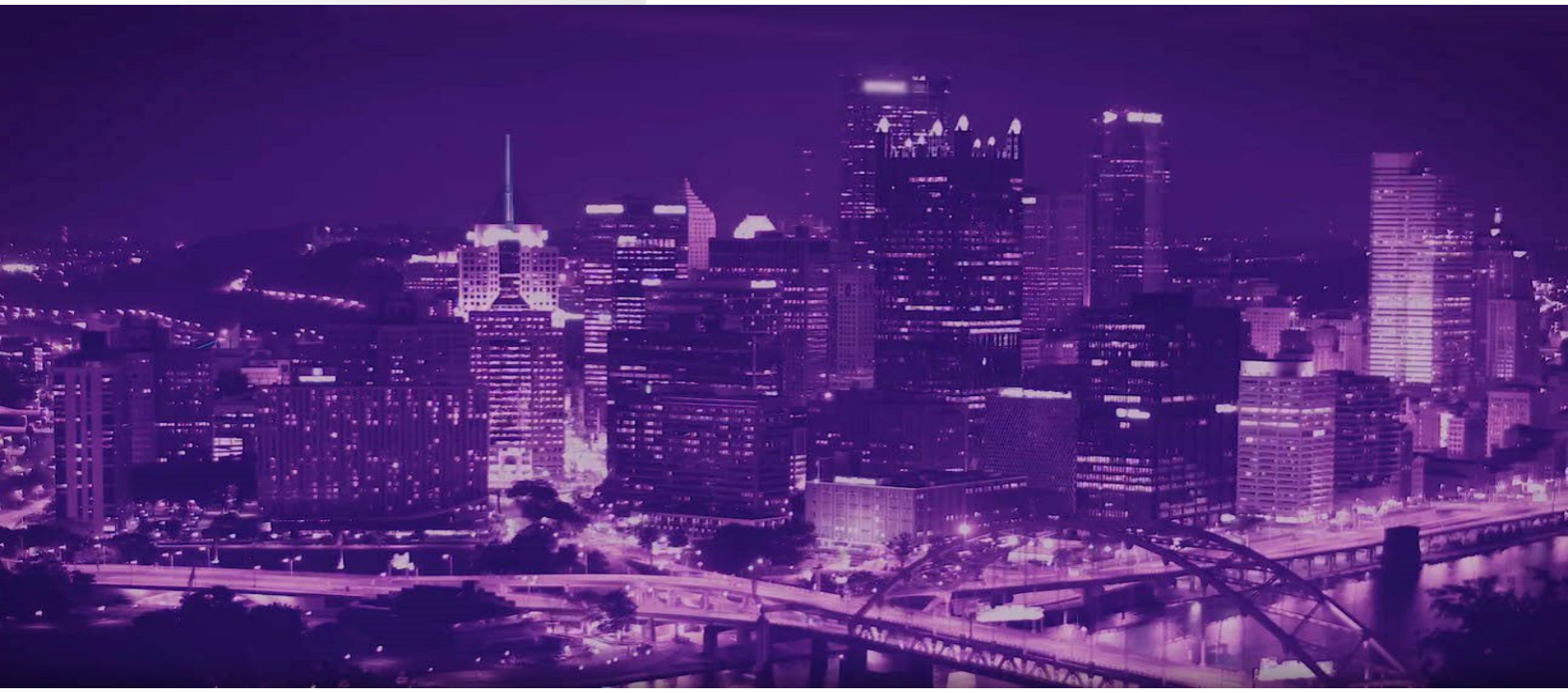
Centurisk



RiskStar

ACWAJPIA - Member Guide

Centurisk Risk Management, Inc. • Foster Plaza Building 0 • 400 Holiday Dr., Suite 200 • Greentree, PA 15220
www.Centurisk.com/risk

Table of Contents

Introduction 3

Member 4

Site 5

Building 8

Fixed Equipment 9

Licensed Vehicle 11

Movable Equipment 13

Personal Property 15

Valuation Widget 17

Audit Trail 22

Property Schedule Report 23

Introduction

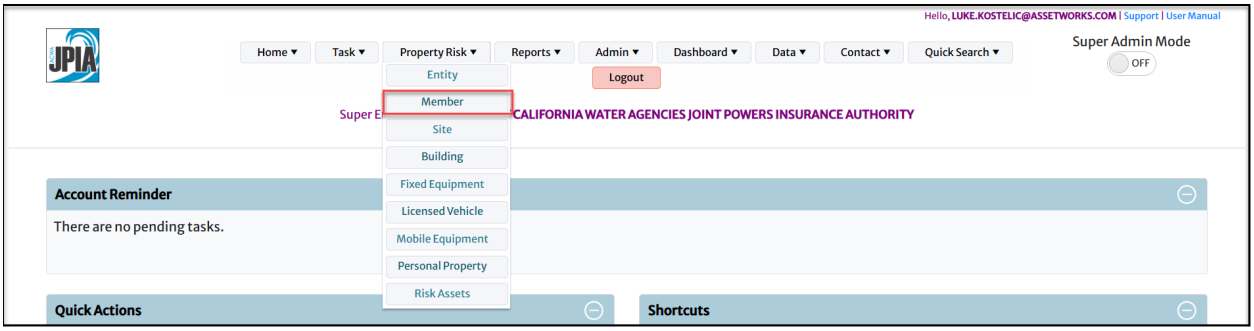
The RiskStar Property Risk Management Module is a powerful tool designed to help you comply with ongoing and annual property insurance reporting requirements, by making data collection and reporting simple and efficient. This configurable system has been set up to meet your users' specific needs, and the web-based software doesn't require installation; it's easily accessible through your web browser.

The goal of this User Guide is to help you understand how to navigate through the features of RiskStar and the Property Risk Management Module. Centurisk has fully tested all aspects of this manual through extensive internal quality assurance processes prior to its delivery. Each chapter is specific to one component of your software and divided into parts by feature. The first chapter introduces the navigation and system features of RiskStar. Every subsequent chapter presents a function of property risk management and provides instruction on how to process relevant transactions in the software.

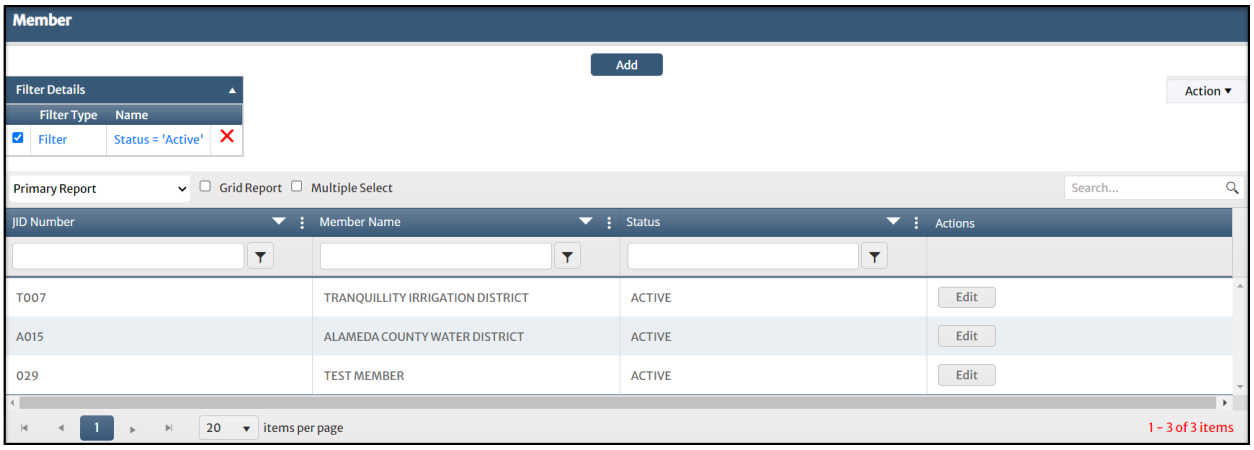
Member

The **Member** module documents the details of a Member.

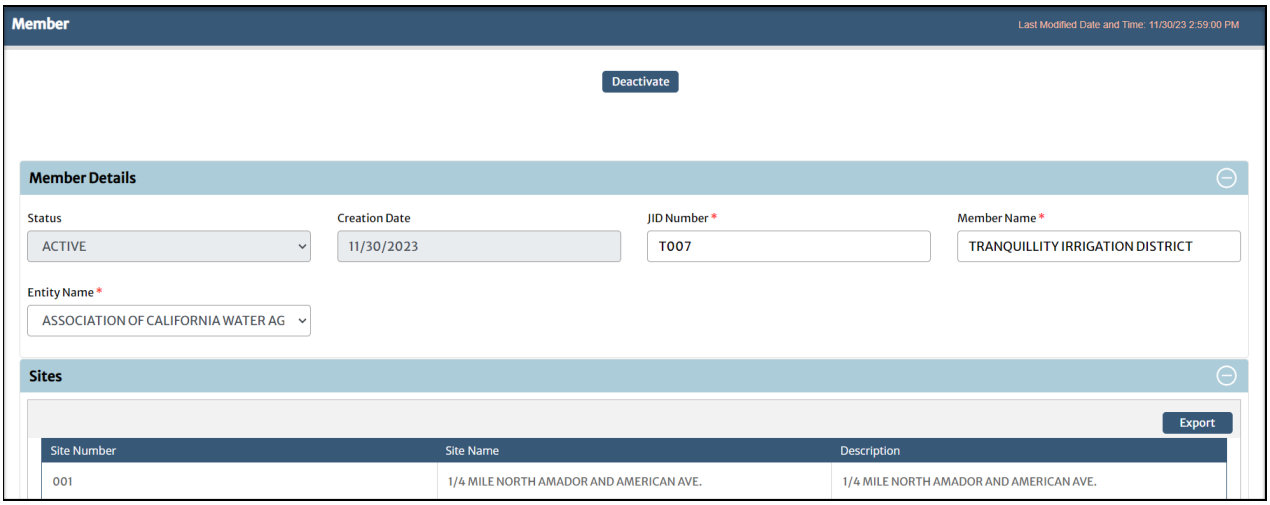
To navigate to the Member Page hover your cursor over Property Risk and select **Member**.



That will take you to the Member Grid



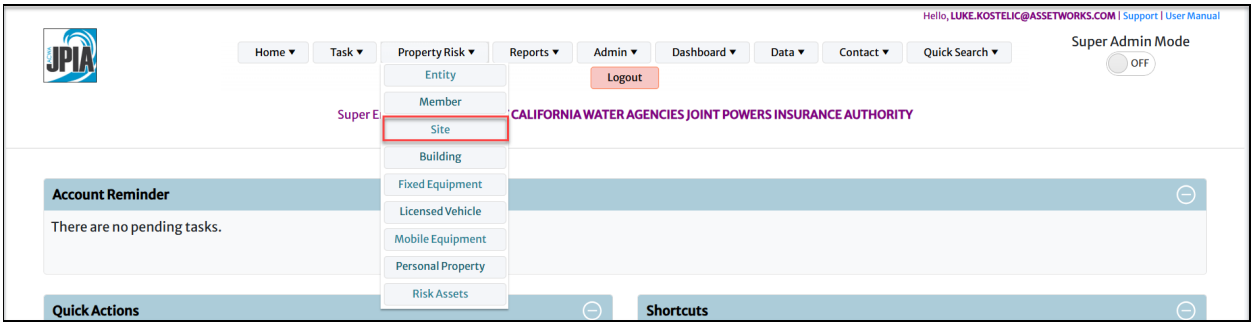
It can be configured to record the information your Member needs by selecting the member.



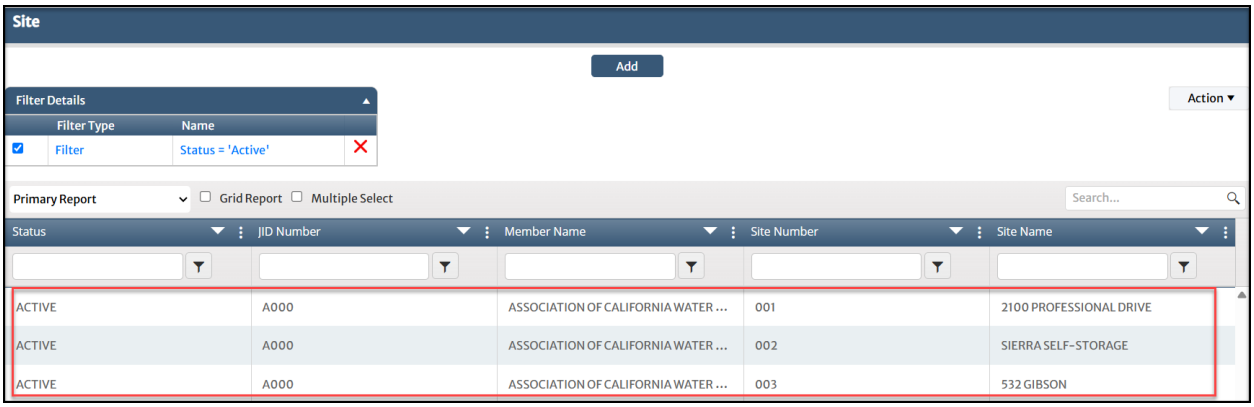
Site

A **Site** is a table in the hierarchy tied to the Member and Location. The Site Number must always be unique for each Member.

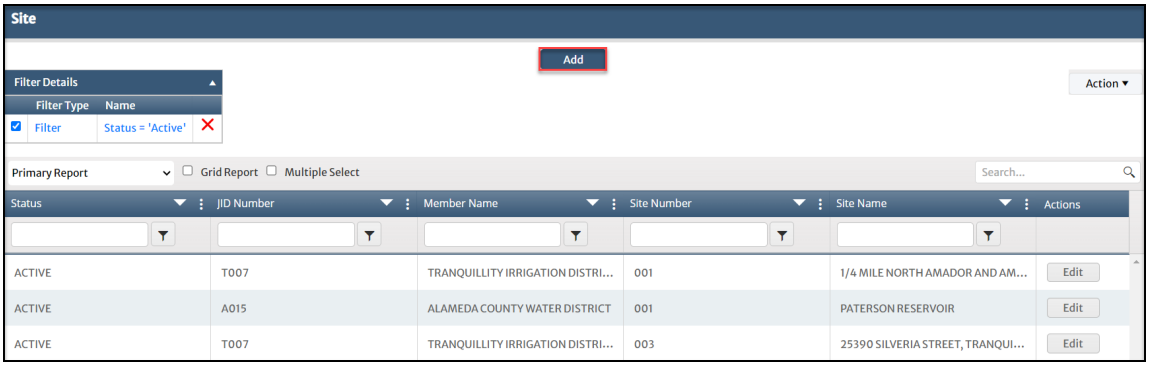
To navigate to the Site Page hover your cursor over Property Risk and select **Site**.



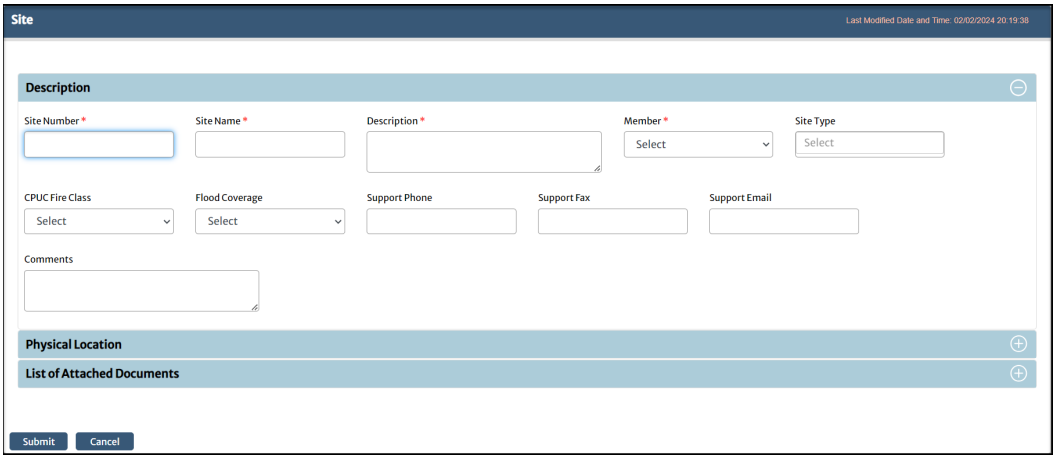
To open a previously saved Site and add or edit the data, click on the **Site** that you want to update in the grid.



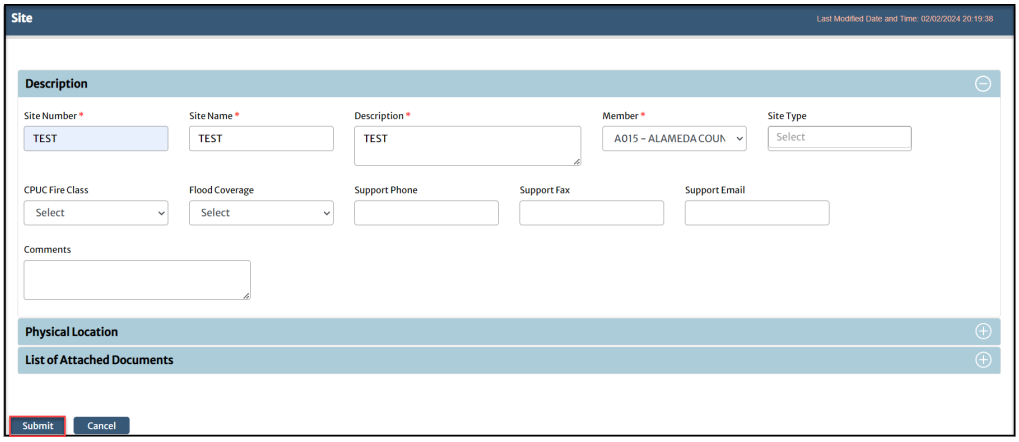
To add a new Site, click the **Add** button.



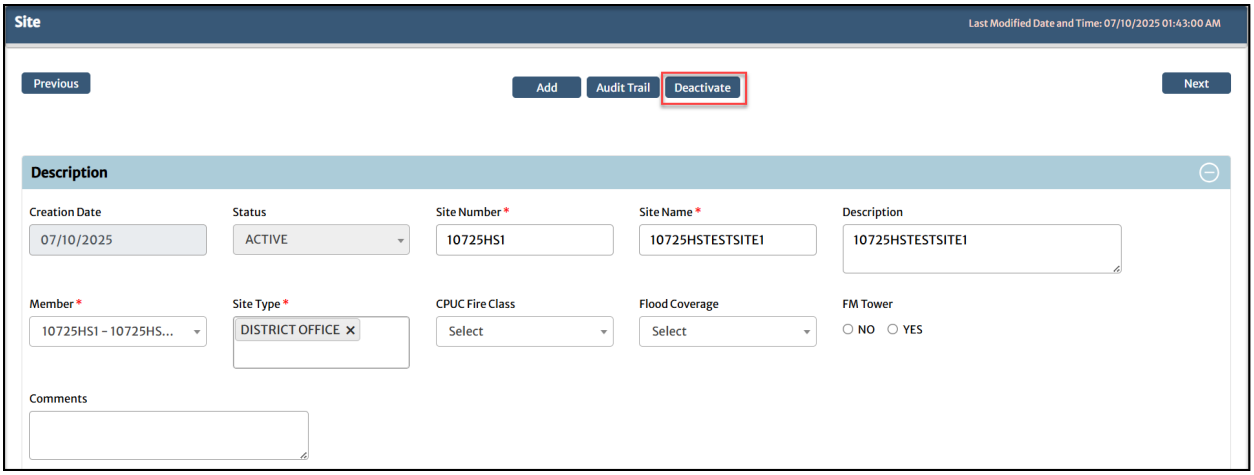
You will then be brought to the Site Detail section to create your new Site. (All fields with a red asterisk are required.) Note, the **Site Number** must be unique for each Member.



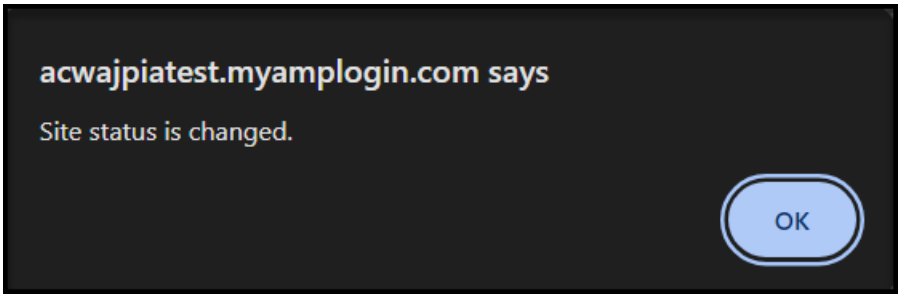
Once added, the new Site will be active in the system. The ability to **Add** or **Deactivate** a Site is based on the user's rights in the Admin Module. The view-only **Creation Date** field displays the date on which your site was created.



To Deactivate a Site, click the **Deactivate** button above the **Site** grid. This opens a popup dialog box noting the status of the Site is changed. Click the **OK** button to close.



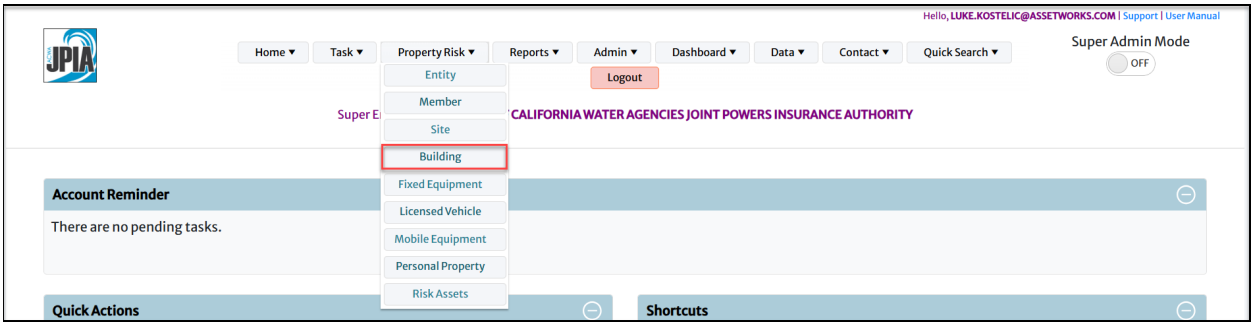
Deactivate Message:



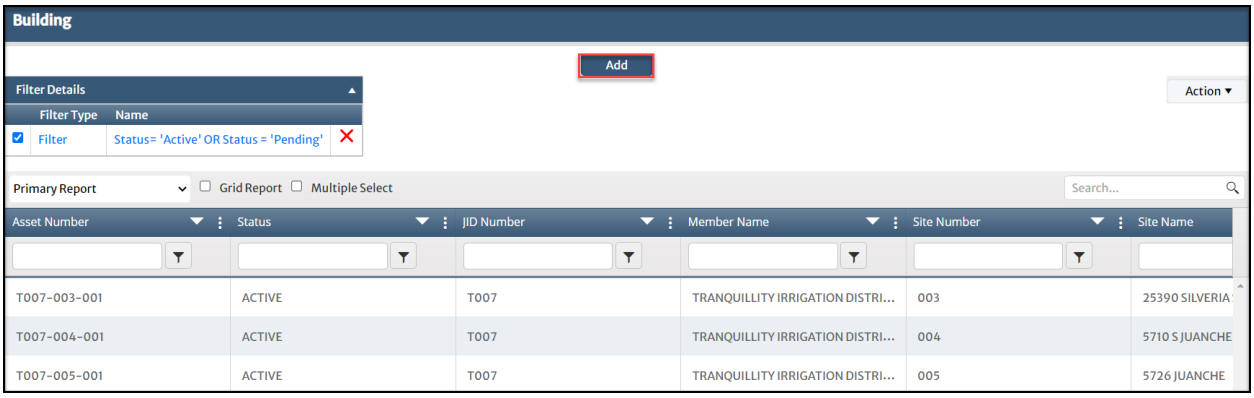
Building

The **Building Module** lets you quickly and easily document all buildings, values, and additional information, collecting all information related to a specific building in one page. On the **Building** page, the Diary Widget and Valuation Widget become powerful tools to add additional information to a building.

To navigate to the Building Page hover your cursor over Property Risk and select **Building**.

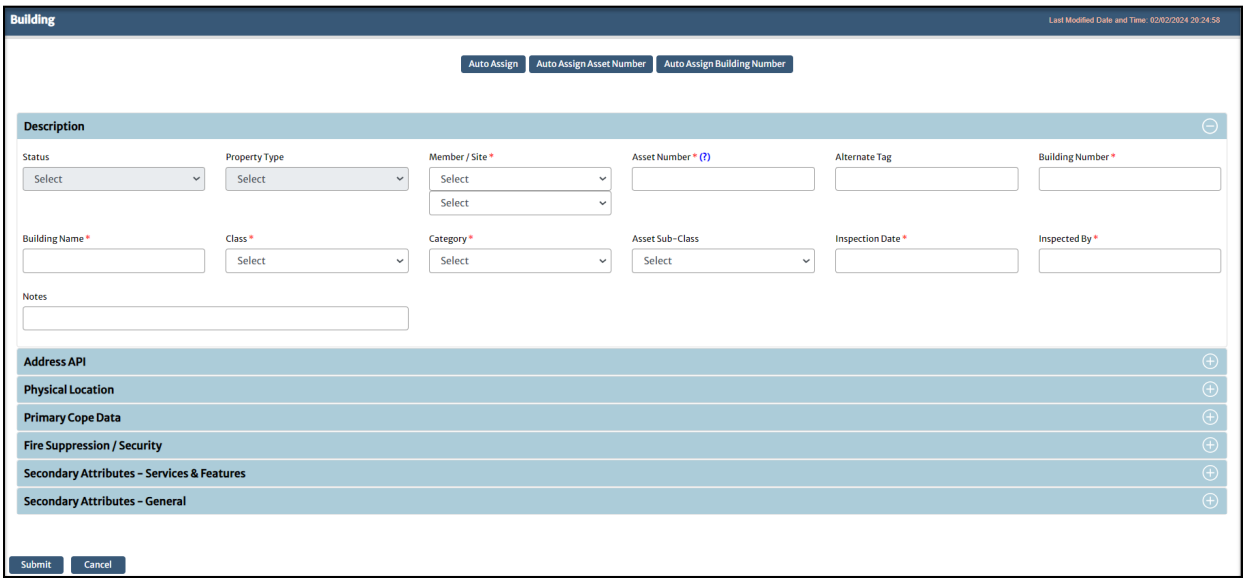


To add a new Building, click the **Add** button on the Building Grid Page.

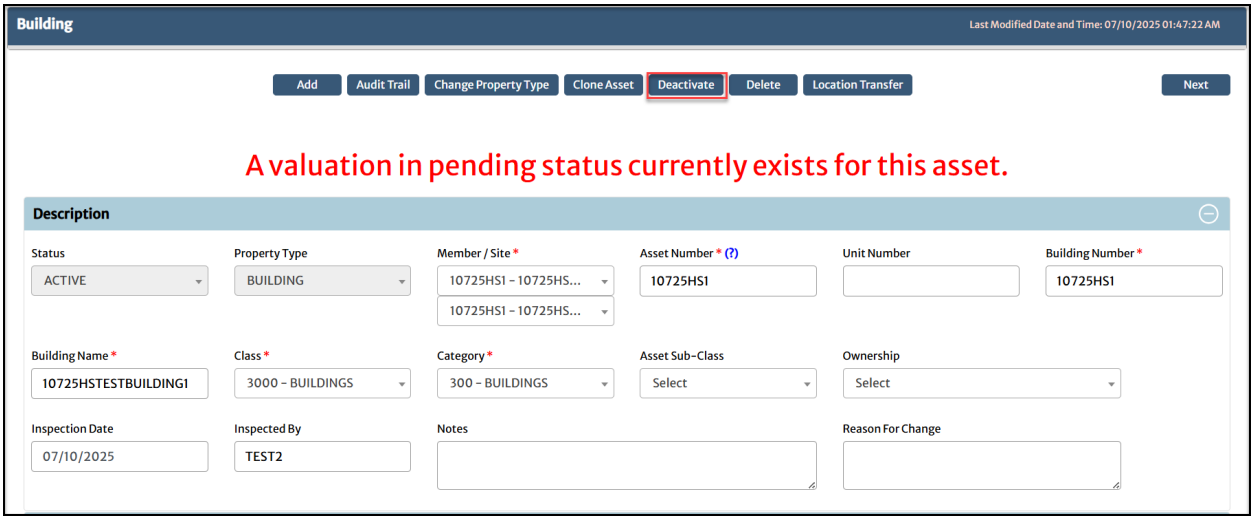


You will then be directed to the screen shown below. **All the fields with a red asterisk are mandatory fields**. **Please Select the Member / Site, then the Auto Assign Building Number followed by the Auto Assign Asset Number to populate the Asset Number and Building Number**.

Valuation Source – The software application provides eight (8) choices for valuation source. The most common selections for existing Sororities are either Member Supplied or Appraisal. **All other selections should be avoided as they would occur by the system administrators.**
If a date is not known, please use 01/01/2040 or 2040 if a year is required.



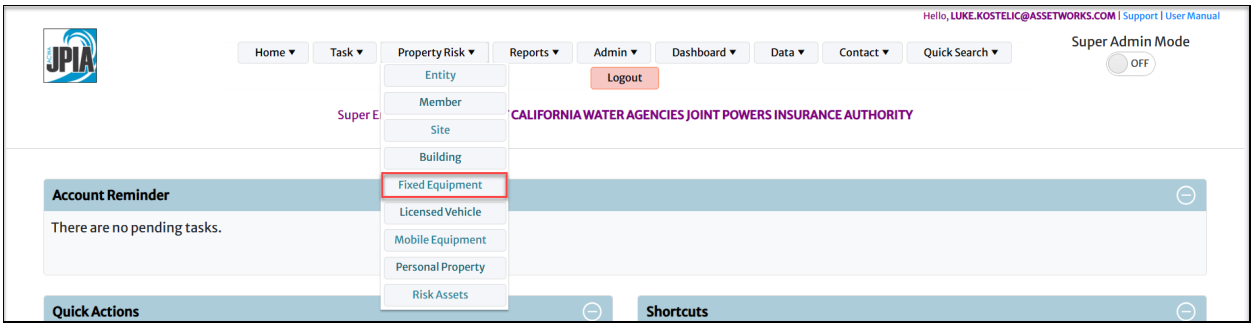
To **Deactivate** a Building select **Deactivate** from the Asset Detail Page.



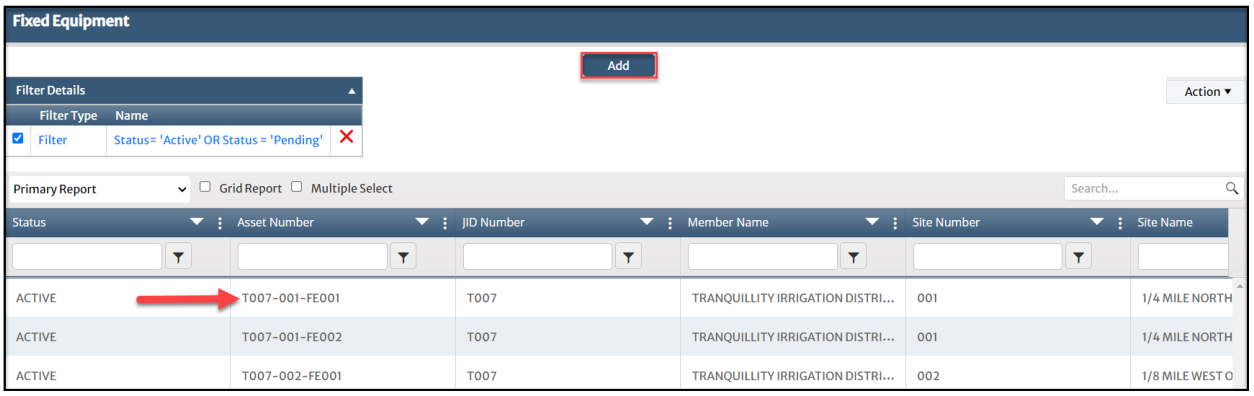
Fixed Equipment

Includes stationary machines or devices, powered or unpowered, that are used to do work and are fixed within a work location .Once configured, your system will have custom fields to store whatever data is relevant to your firm. The Fixed Equipment page documents information and data related to the piece of equipment.

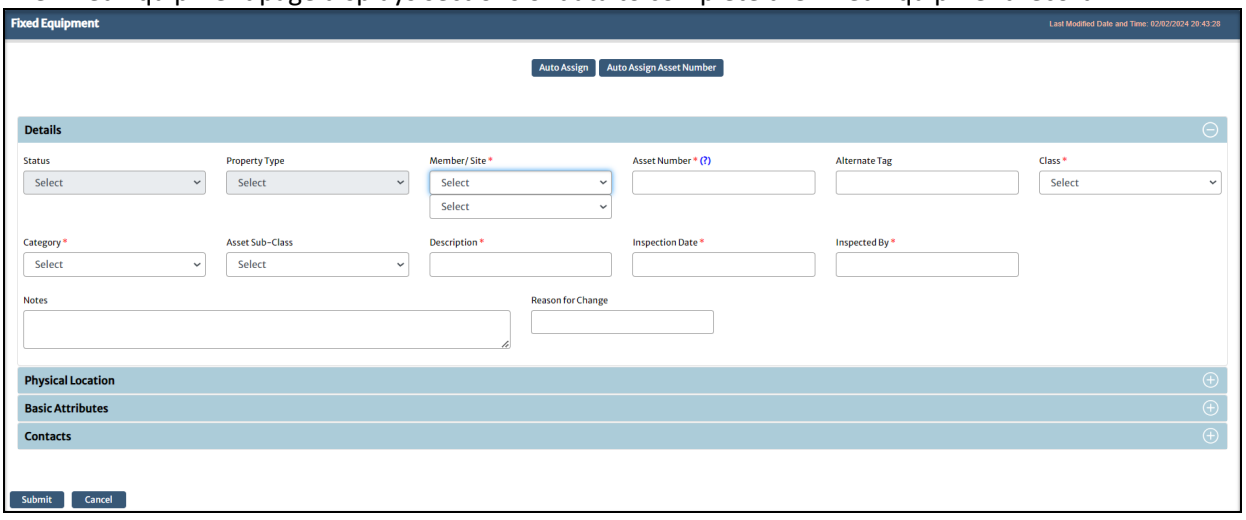
To navigate to the Fixed Equipment Page hover your cursor over Property Risk and select **Fixed Equipment**.



To open a previously saved Fixed Equipment**,** click on the grid of the Fixed Equipment information. To add a new **Fixed Equipment** record, click **Add**.

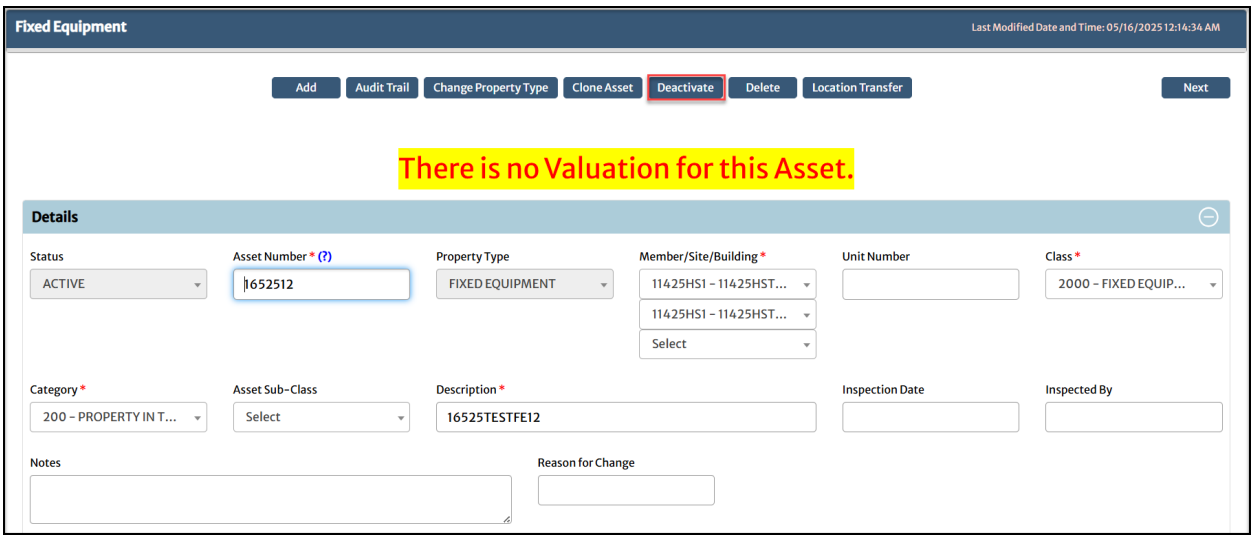


The Fixed Equipment page displays sections of data to complete the Fixed Equipment record.



A new Fixed Equipment record will be set to a Pending Status to be approved by the admin user in the New Pending Assets Review once submitted.

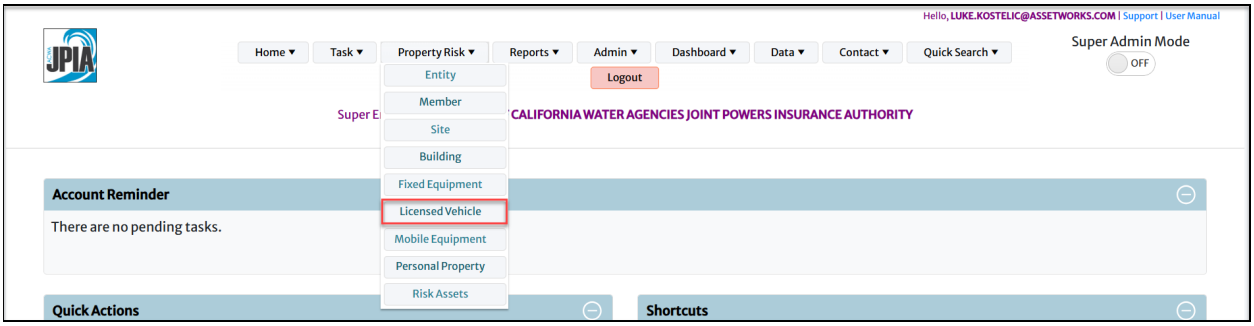
To **Deactivate** a Fixed Equipment Asset select **Deactivate** from the Asset Detail Page.



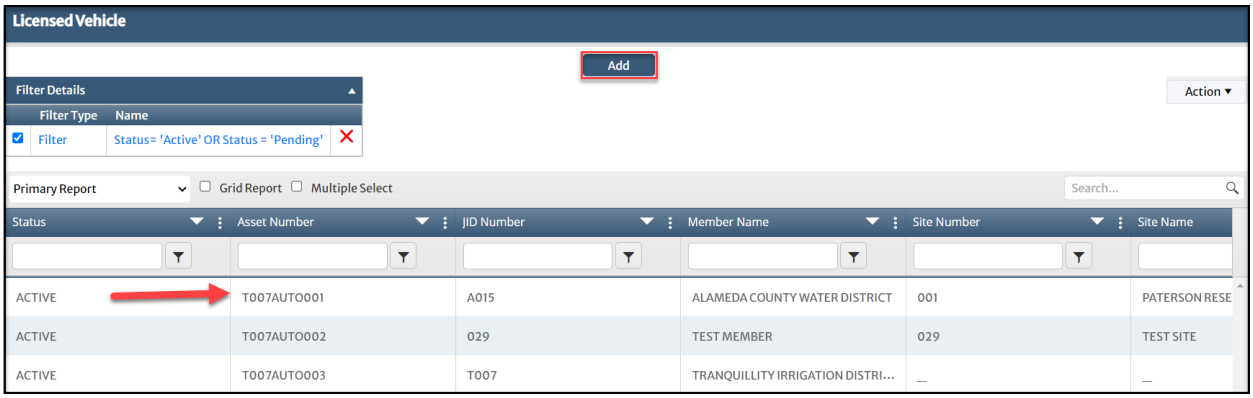
Licensed Vehicle

The Licensed Vehicle page documents licensed vehicle information including vehicle type, licensed, make, model, VIN, and additional information.

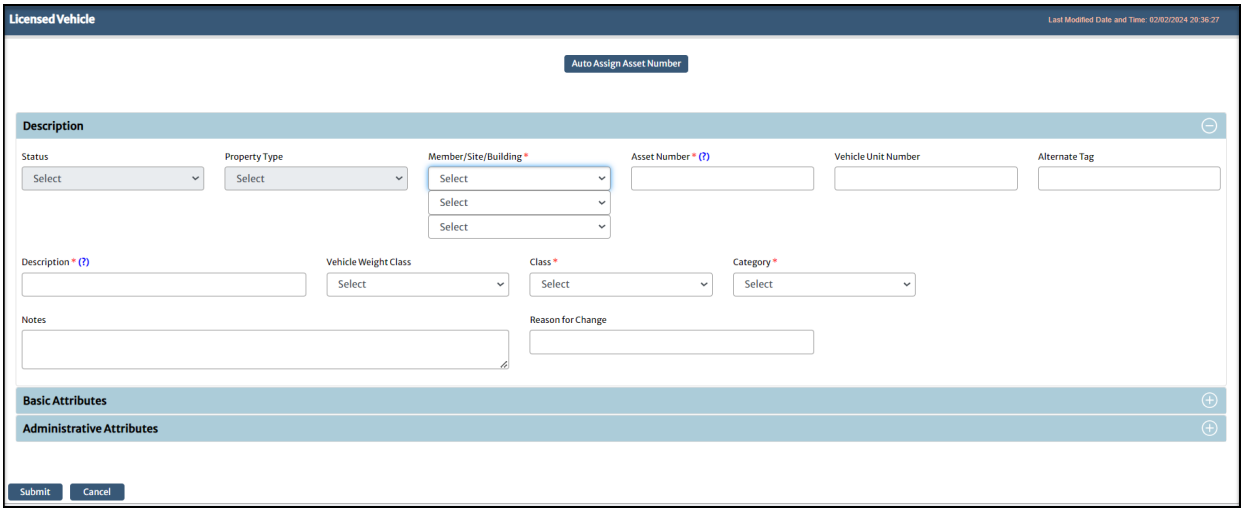
To navigate to the Licensed Vehicle Page hover your cursor over Property Risk and select **Licensed Vehicle**.



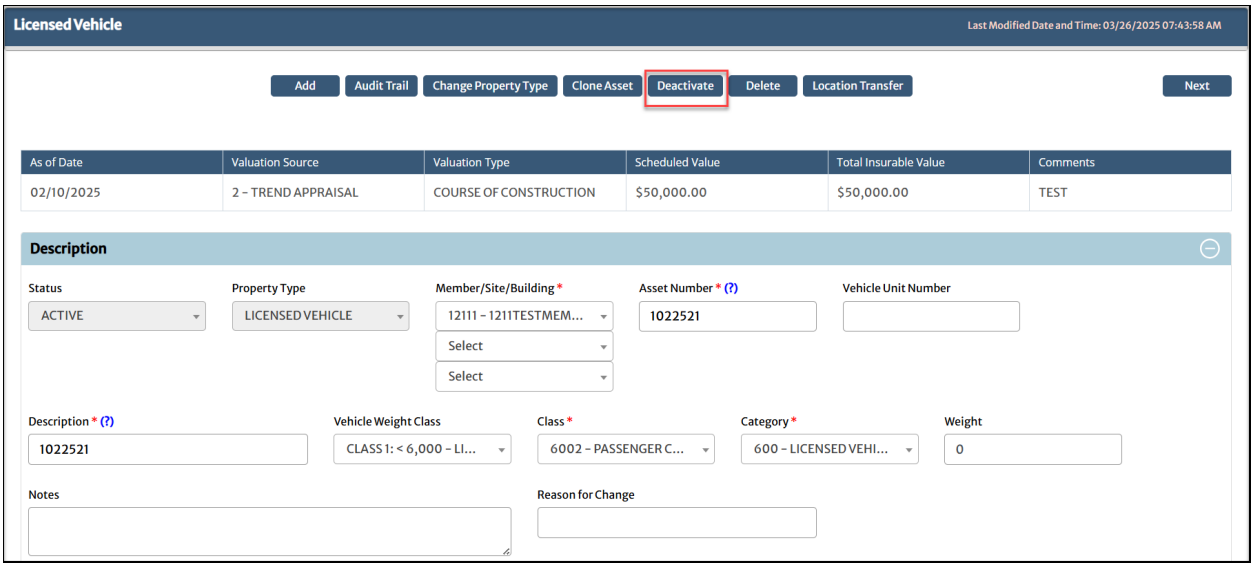
To open a previously saved Licensed Vehicle, click on the grid of the Licensed Vehicle information. To add a new Licensed Vehicle click **Add**.



A new Licensed Vehicle will be set to a **Pending Status.** The admin user will approve the new Licensed Vehicle on the New Pending Assets Review. Once approved, the Licensed Vehicle displays section of different data.



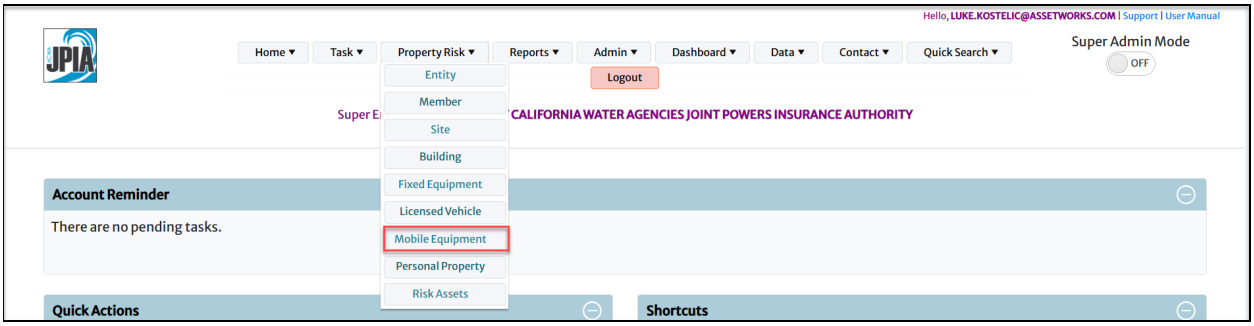
To **Deactivate** a Licensed Vehicle select **Deactivate** from the Asset Detail Page.



Movable Equipment

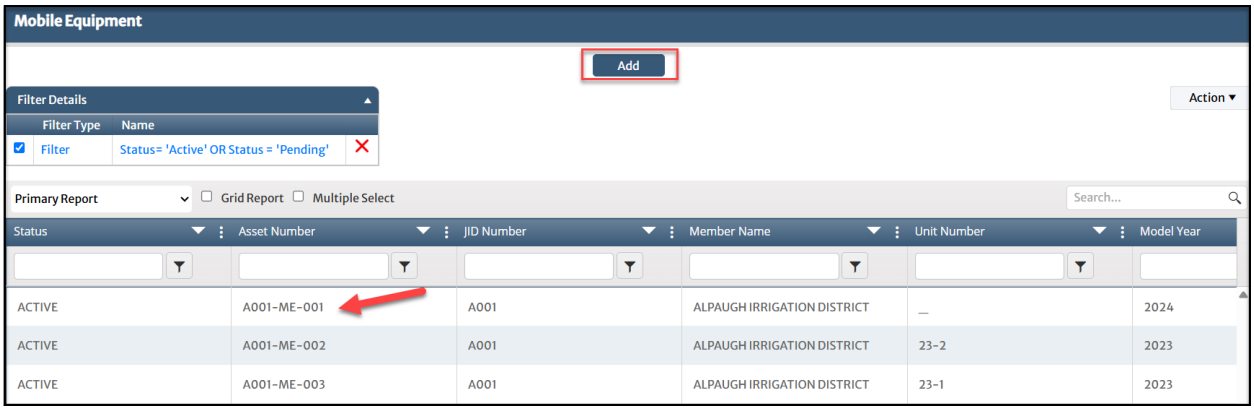
Includes hand-held or non-hand-held machines or devices, powered or unpowered, that are used to do work and are moved within or between work locations. Once configured, your system will have custom fields to store whatever data is relevant to your firm. The Movable Equipment page documents information and data related to the piece of equipment.

To navigate to the Mobile Equipment Page hover your cursor over Property Risk and select **Mobile Equipment**.



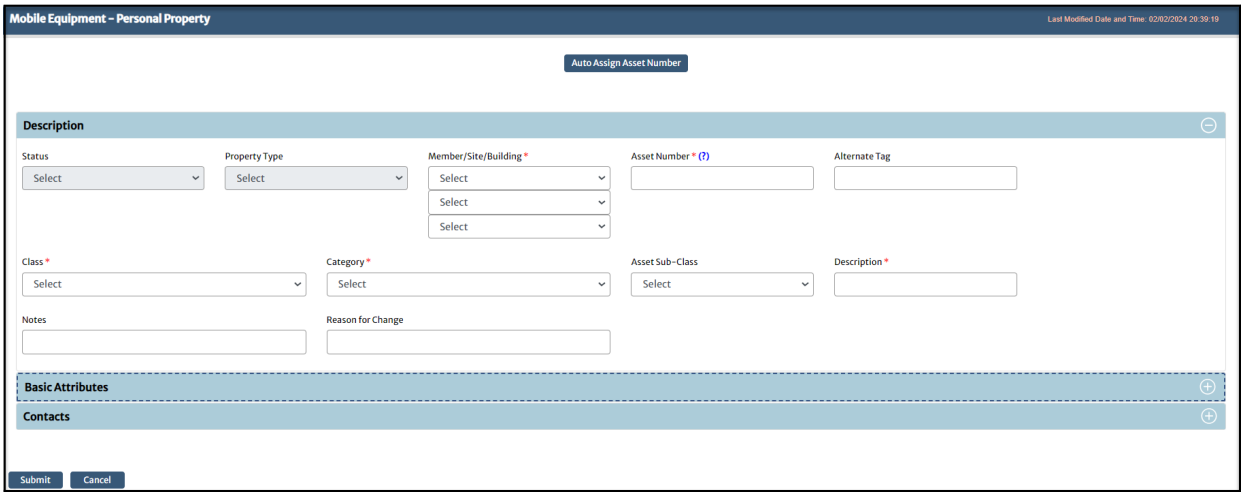
To open a previously saved **Movable Equipment,** click on the grid of the **Movable Equipment** information.

To add a new **Movable Equipment** record, click **Add**.

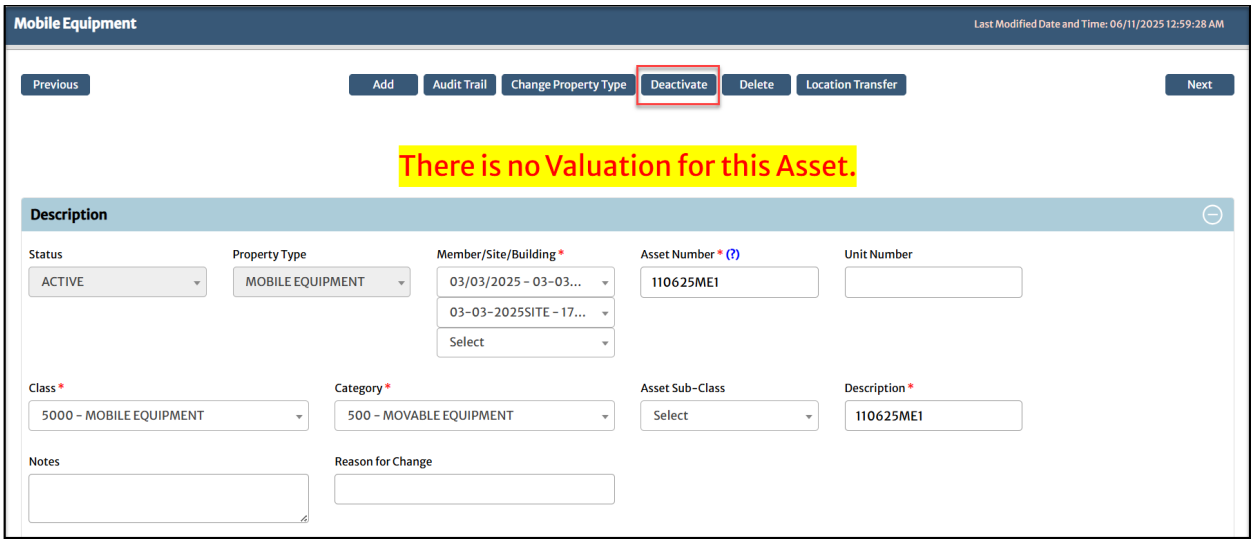


The Movable Equipment page displays sections of data to complete the Movable Equipment record.

A new Movable Equipment record will be set to a Pending Status to be approved by the admin user in the New Pending Assets Review.



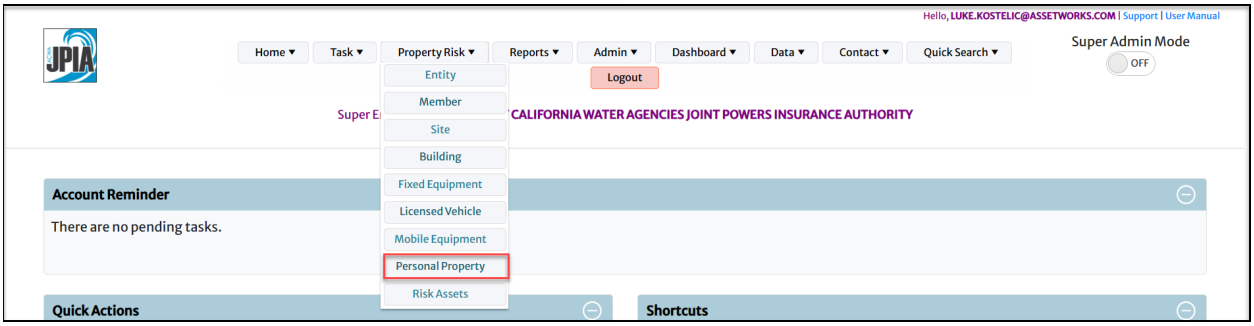
To **Deactivate** a Mobile Equipment Asset select **Deactivate** from the Asset Detail Page.



Personal Property

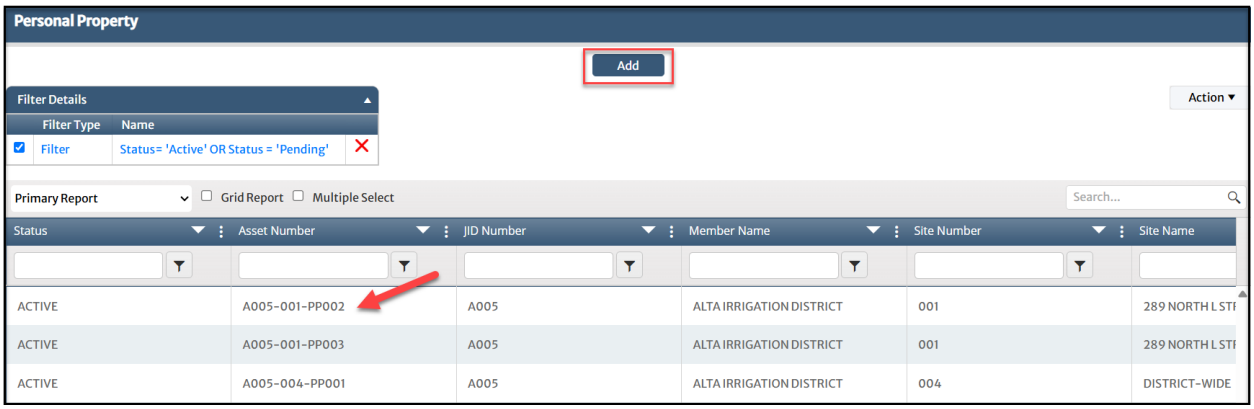
Includes furniture, tools, and various other supplies. Once configured, your system will have custom fields to store whatever data is relevant to your firm. The Personal Property page documents information and data related to the piece of Personal Property.

To navigate to the Personal Property Page hover your cursor over Property Risk and select **Personal Property**.



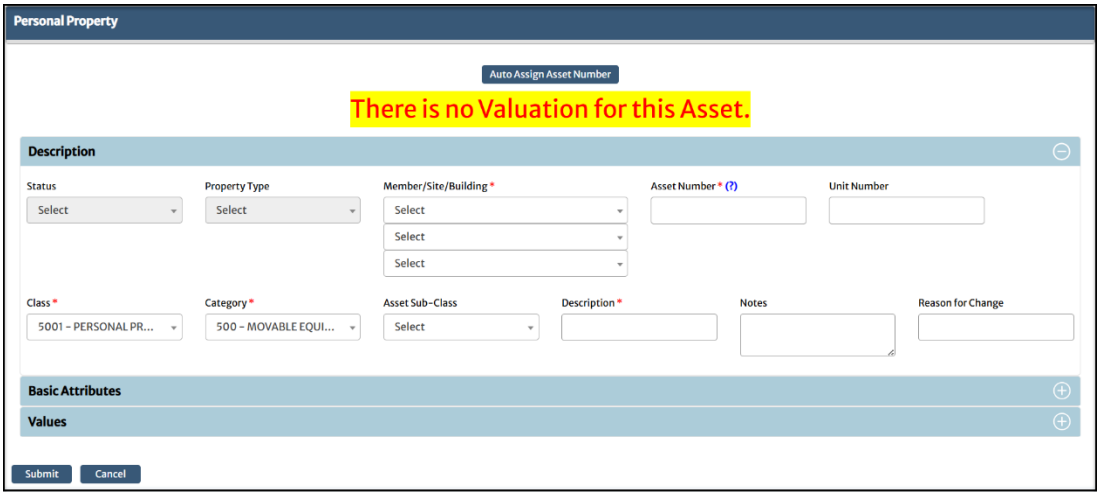
To open a previously saved **Personal Property,** click on the grid of the **Personal Property** information.

To add a new **Movable Equipment** record, click **Add**.

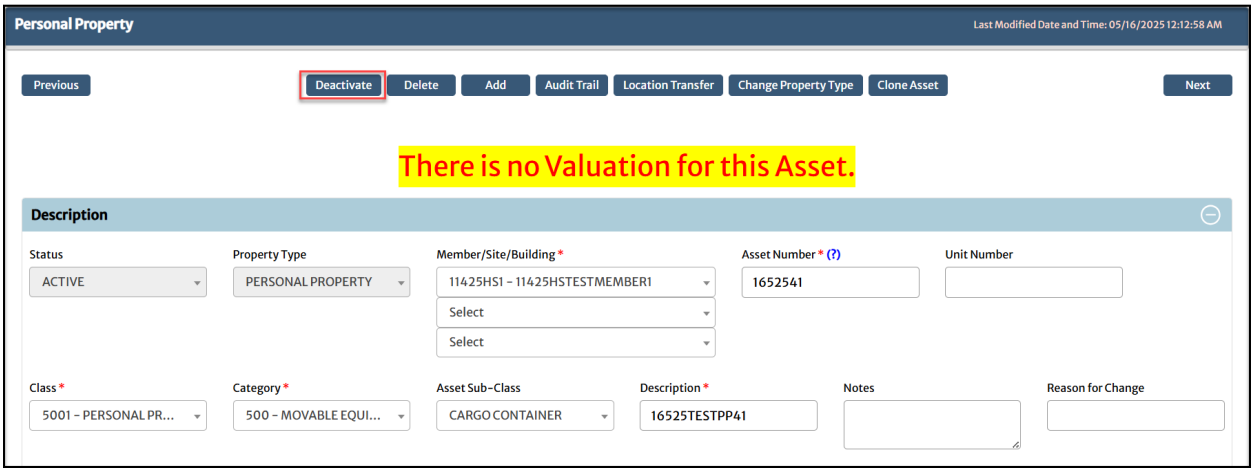


The Movable Equipment page displays sections of data to complete the Movable Equipment record.

A new Movable Equipment record will be set to a Pending Status to be approved by the admin user in the New Pending Assets Review.



To **Deactivate** a Personal Property Asset select **Deactivate** from the Asset Detail Page.

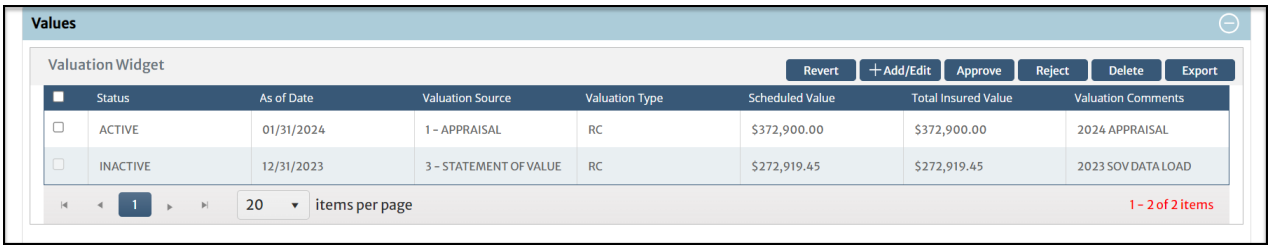


Valuation Widget

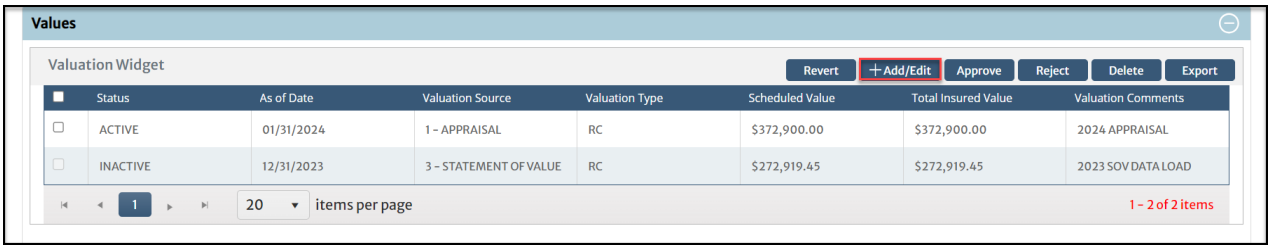
The **Valuation Widget** is where you define and manage valuation records for building/structures and other assets belonging to the Member of your Entity. It also lets you view and edit existing valuation records directly from the grid, simply by clicking on that specific record.

The Valuation Widget documents and tracks all the valuations for a building. Here, you can track and view any pending, approved, or rejected valuation records, as well as add and edit valuations.

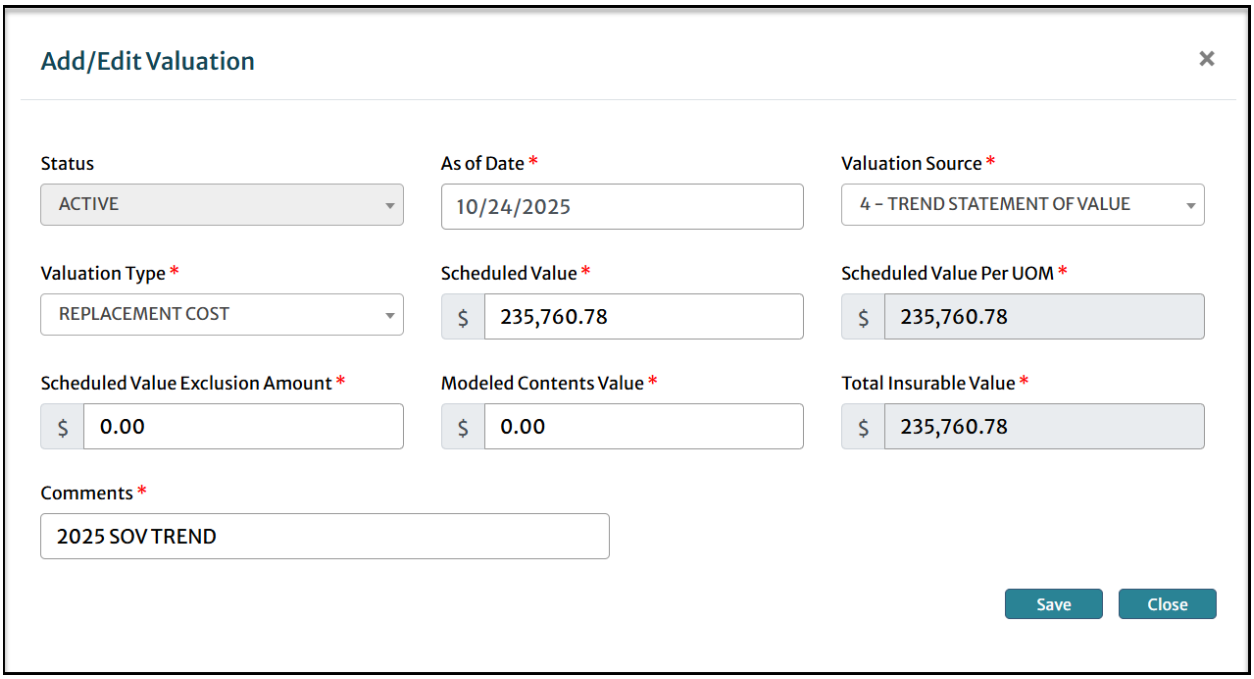
The active and/or pending valuations can also be exported into an Excel spreadsheet. The following section will explain how to do these tasks in detail.



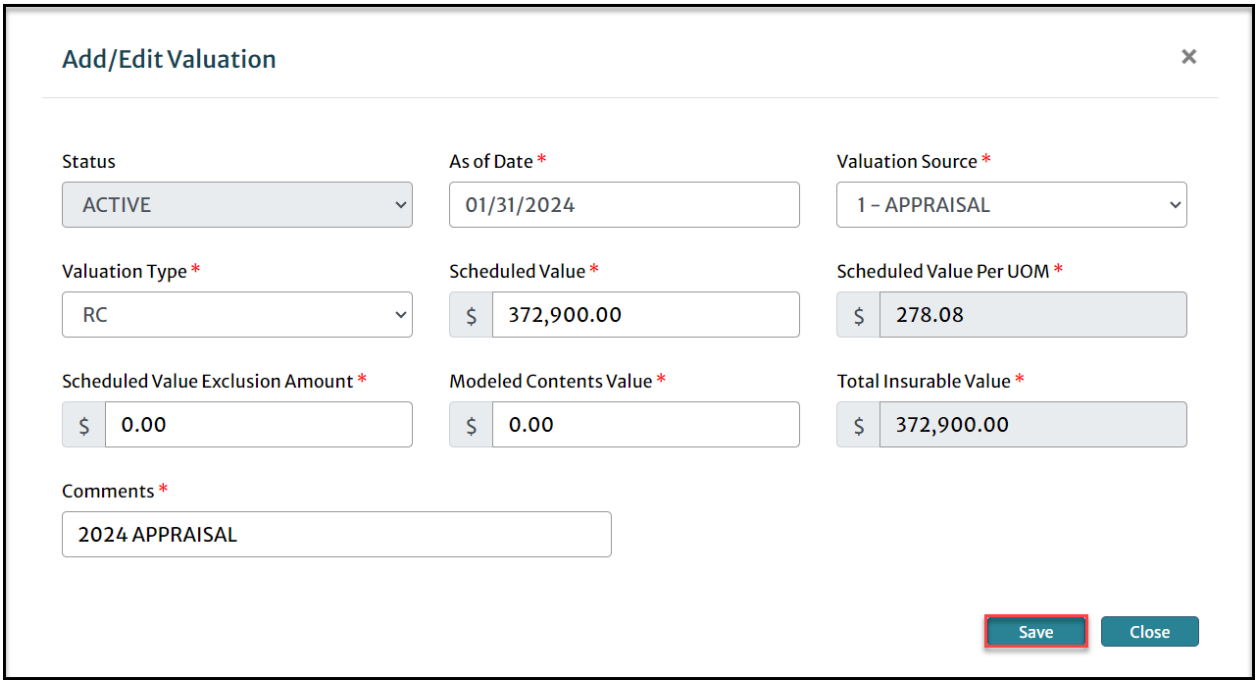
To add a valuation to the Valuation Widget, click the **Add** button from the **Values** section of an asset detail page, as shown below.



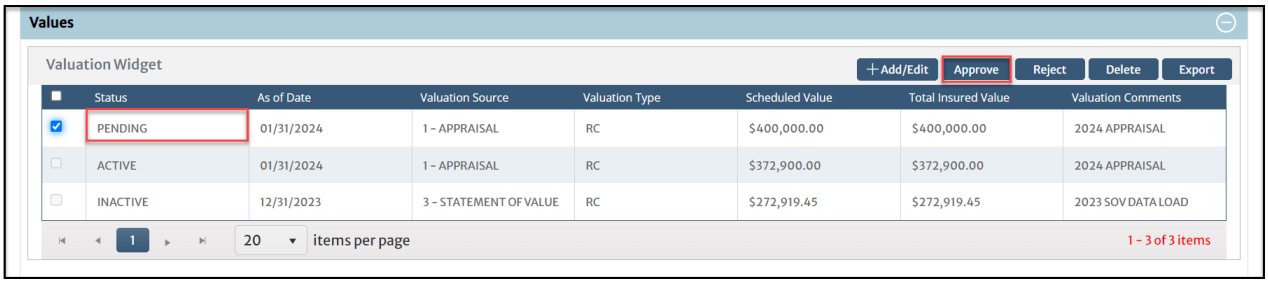
This brings up the **Add Valuation** dialog box.



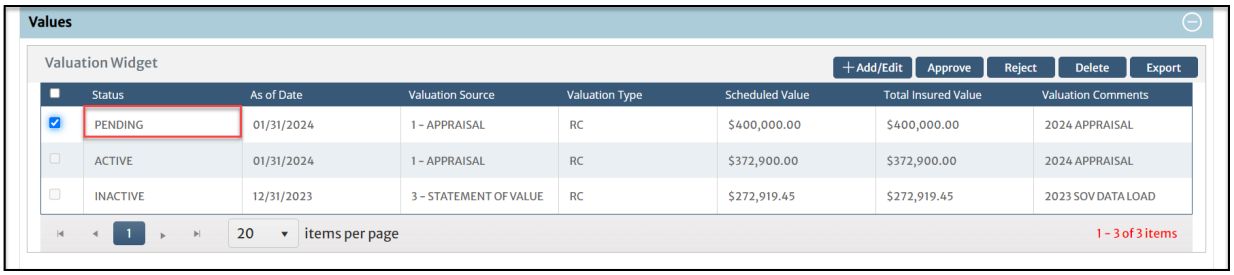
In the **As Of Date** box, enter the date the valuation became active. In the **Valuation Source** dropdown menu, choose the source of the valuation. Enter the required valuation fields, then click **Save** to submit the new valuation.



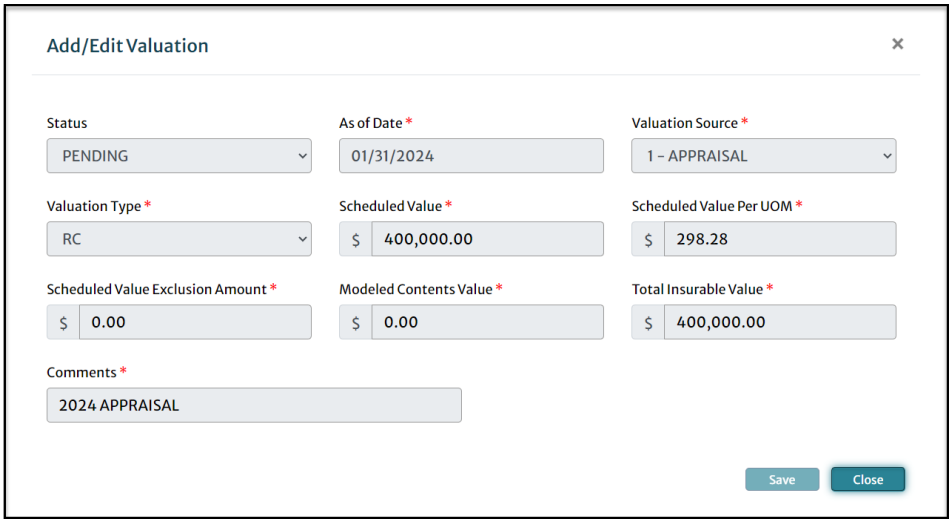
The valuation's status will now be set to **Pending**. This means it will need to be approved by the tiers of authorized users in your Sororities approval workflow. Once the valuation has been approved, the status will be updated to **Approved** in the system and will display as the top value in the widgets grid.



To view a previous valuation, click the data under the column's headers to open that valuation.



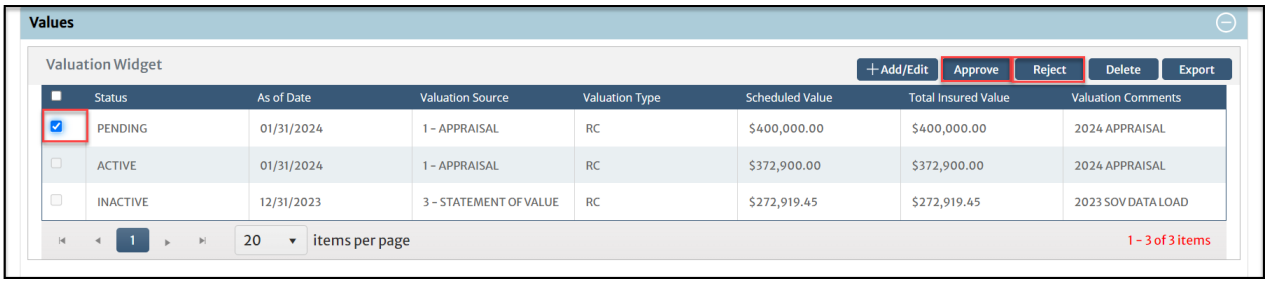
This opens the **Add Valuation** popup screen. The valuation details are only *viewable* after being submitted for approval; you can't edit them at this point. Click the **Close** button to exit the popup.



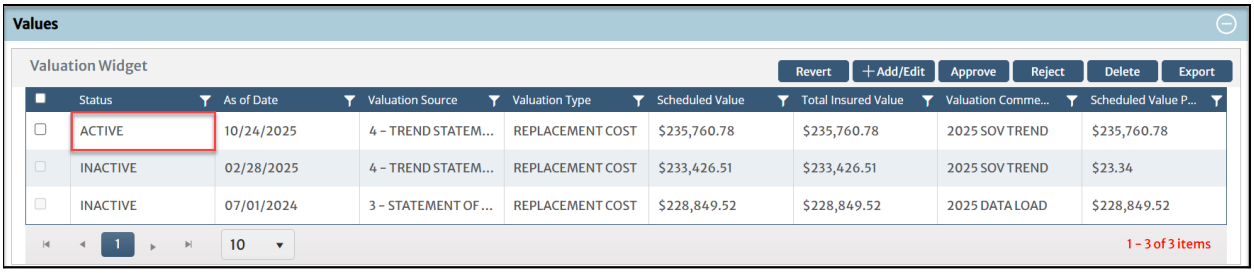
The tiers of authorized users in your Members approval workflow must approve or reject each **Pending** valuation record. To do so, go to the **Valuation Widget**, select the valuation you want to approve or reject by clicking the check box next to the Pending valuation's **Status** column.

To approve the valuation, click the **Approve** button in the Valuation Widget.

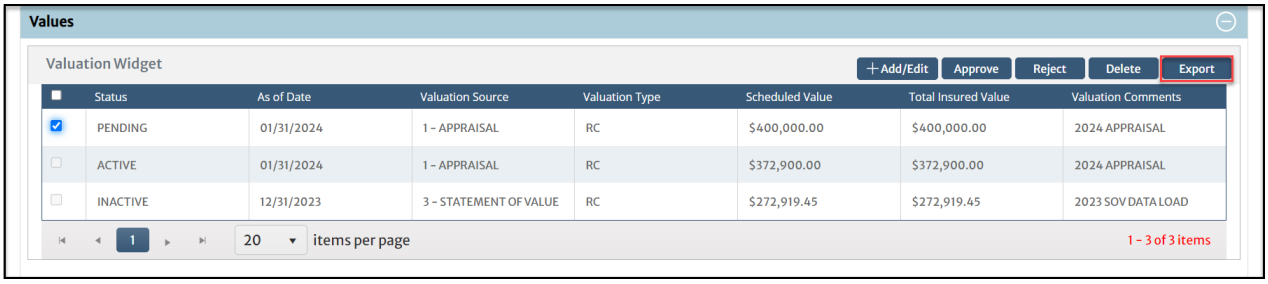
To reject the valuation, click the **Reject** button.



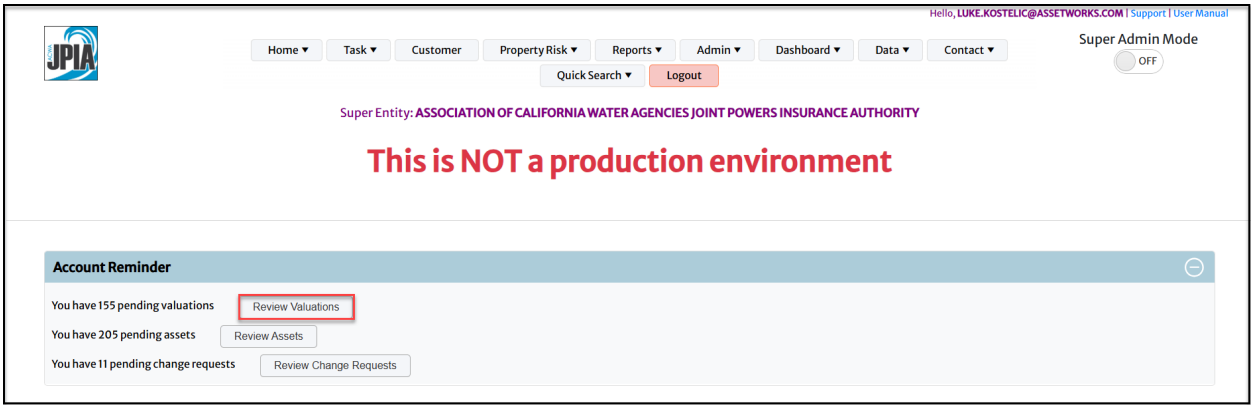
Once a Pending valuation has been approved, it will replace the previous **Active** valuation. The Valuation grid only displays one Active valuation at a time — the most recent one.



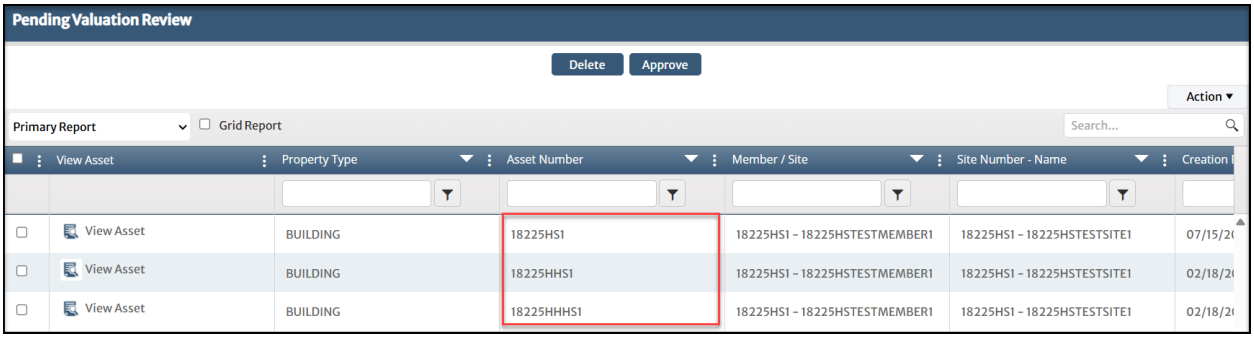
To export all the Valuation Widget grid content into an Excel spreadsheet, click the **Export** button. This will allow you to export the grid data and save as an Excel file.



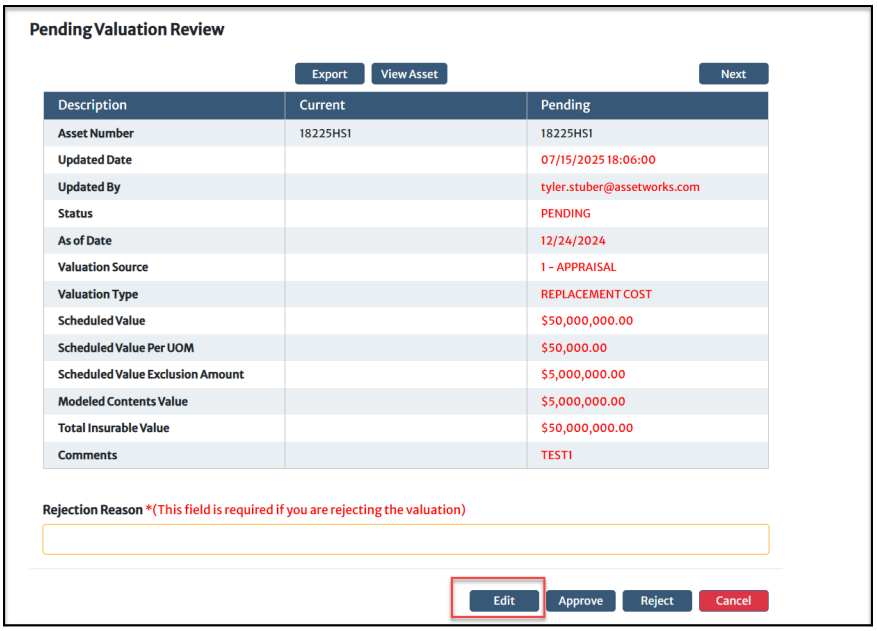
To edit a Pending Valuation select **Review Valuations** from the Accounts Reminder section of the **Home** Page.



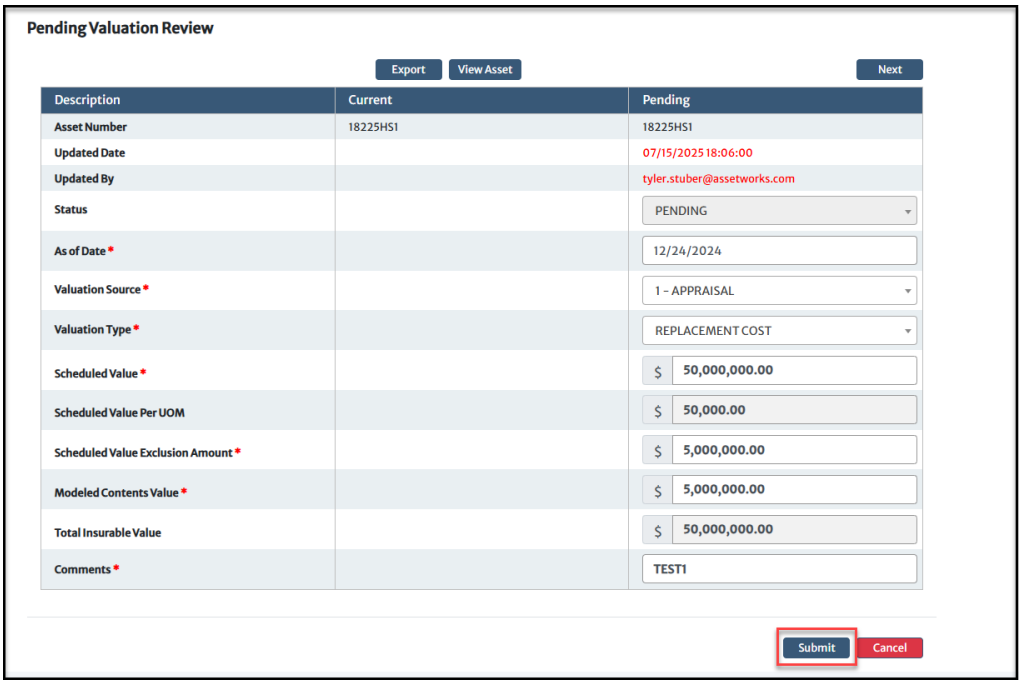
From the Pending Valuation Review grid select your asset. Note do NOT select the **View Asset** button as that will take you back to the asset detail page instead, select any of the other blocks on the grid.



From the Pending Valuation Review Form select **Edit**.



Make your updates and select **Submit**. The asset will remain in a state of Pending Valuation.

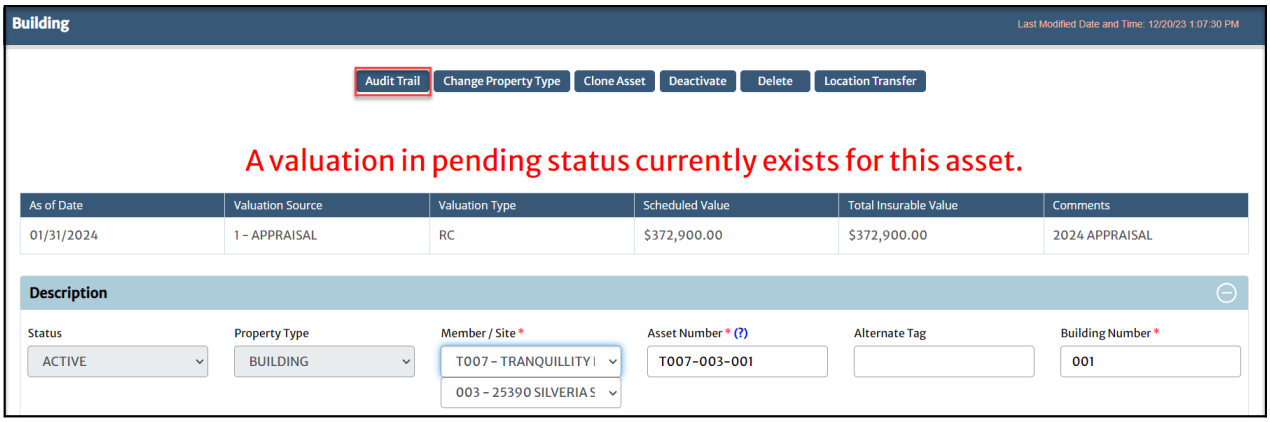


Audit Trail

Each module page has its own **Audit Trail**. This is a historical data feature that includes a chronological set of records that document the sequence of activities that have changed on the page over time.
Anything that's edited, deleted, or inserted is recorded using the Audit Trail.

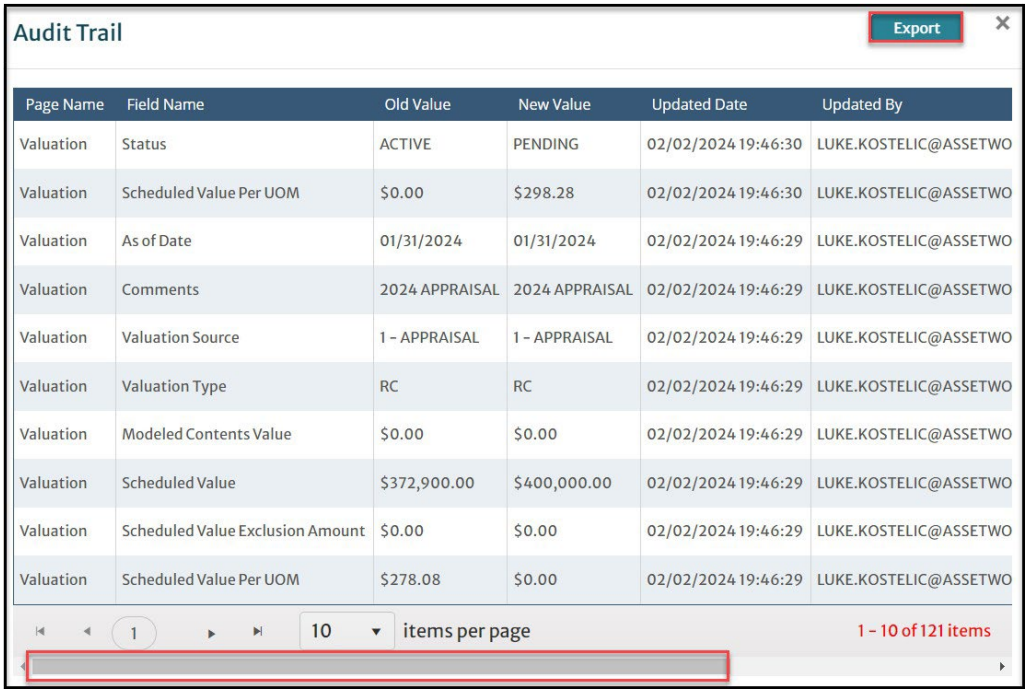
The Audit Records include **the page, field name, the old and new values, the updated date, the user who made the update,** and the **updated type.**

To view the Audit Trail for a page, click the **Audit Trail** button at the top of that page.



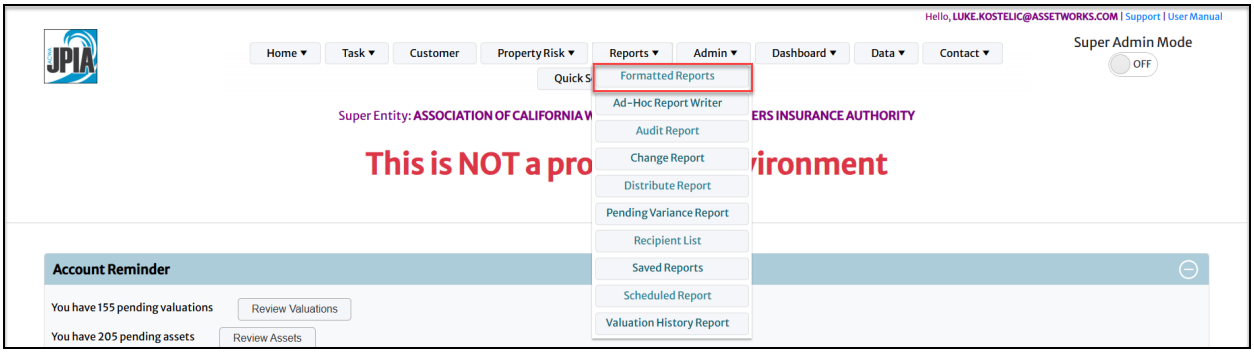
The Audit Trail is a pop-up grid that shows the Audit Trail history. There is a movable bar at the bottom so you can view the complete Audit Trail.

The Audit Trail can also be exported into an Excel spreadsheet by clicking the **Export** button.

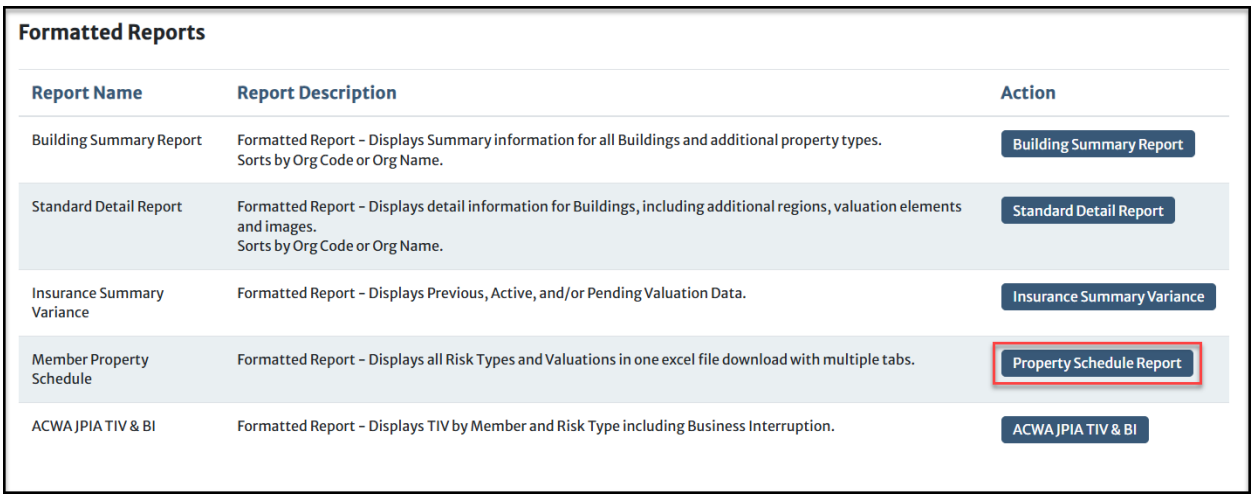


Property Schedule Report

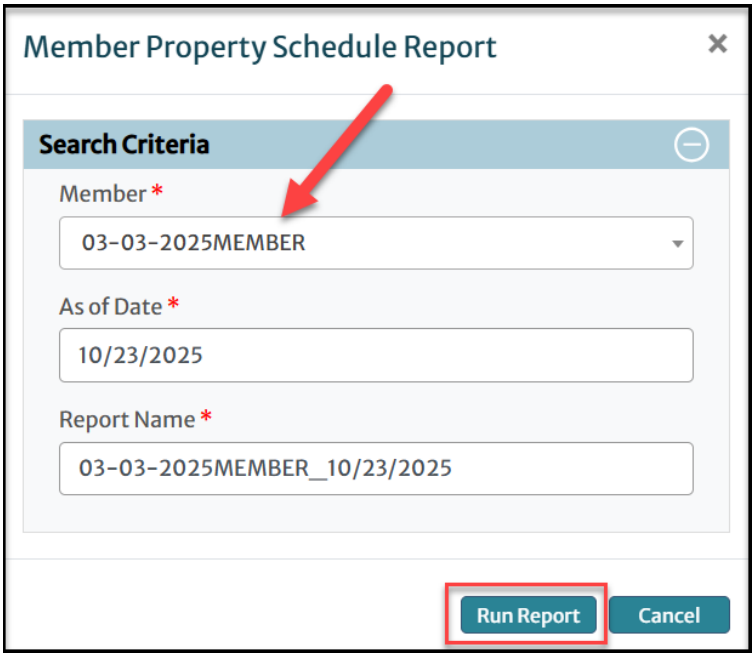
To run the Property Schedule Report hover your cursor over the **Reports** module and select **Formatted Reports**. This report displays all Risk Types and Valuations in one excel file download and is broken out into multiple tabs.



From the Formatted Reports page select **Property Schedule Report**.



Lastly select your Member and click **Run Report**. The As of Date will prepopulate to today's date and the report name will auto populate to Member - Date after your member is selected.



Once **Run Report** is selected your Excel file will download.