**SOP** **Number** Voy.07

**SOP** **Title** Scope Document

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|  | **NAME** | **TITLE** | **SIGNATURE** | **DATE** |
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| **Reviewer** | Abhishek Kalantri | Vice President |  |  |
| **Authoriser** | Shanette Silva | DIRECTOR OF SOFTWARE SUPPORT |  |  |

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| **Effective** **Date:** |  |
| **Review** **Date:** |  |

# PURPOSE

Support Teams tasks which are in scope and not in scope

# SCOPE

# Assess requests are in support team’s scope or not

# DEFINITIONS

# Tasks are in scope

# Tasks are not in scope.

# Points to be noted

# RESPONSIBILITIES

# AGA team will assess the requests and accordingly refer this document before proceeding the requests.

# SPECIFIC PROCEDURE

*Tasks In Scope:*

* User creation in Voyager and in rent cafe
* Property access change at user level
* Data fix via package for the data issues at resident, unit, unit type, rentable item, IR level etc. which can’t be done through front end.
* Transaction date update (not post month)
* Rentable items Market rent update
* Date ready/Date available modification in bulk at unit level. Date available=Date ready. Check to modify both fields
* Property role contact and attribute change addition
* Rebuild workflow where contacts are not in sync for PO/IR approval
* Addition of leasing agent /deactivation at property level
* Unit type addition /modification
* Update the address at unit level/Resident level
* Rent café configuration set up change for website display (unit availability limits)
* Out of office set up
* Job & property department change to user record. Also, User group change
* Camrule end date update- Example-End trash and pest charges- Custom script designed by AGA-rs\_sql\_RPM\_camrule\_update\_End\_Date.txt
* Resident rent change event addition
* Property list creation – Dynamic/Static
* Property attributes change due to role change etc. Addition of attributes value to system attributes. Related to #7, non-employee attributes to be approved by RPM support.
* Adjust lease end date function run at resident level
* History Tables Toolbox- To modify move in, lease from, to sign in dates and other dates.
* Rebuild occupancy
* Delete approved lease proposals-Custom function
* New lease charges creation and manually ending the old lease charge where the charge is posted to ledger
* Reset user password and manual reset for temp users
* Contact replacement
* Rent café floor plan mapping with unit type (When adding unit types, need to map new unit type. RPM Operations cannot resolve)
* Instruct user to change ledger amount where the lease charges are updated, and ledger needs adjustment.
* Report modification/new report creation
* Reverse renewal – through custom function -rs\_sql\_reverse\_proposal\_renewal.txt
* Copy unit type charges-rs\_sql\_copy\_unittype\_Charges1479934\_3422305.txt
* Delete objects-tenants for data issue. Confirming first prior to deletion with RPM support.
* Update tenant address wrt this script rs\_sql\_Update\_Tenant\_address\_5054074.txt- Request are coming to change the unit address & then that flows to Tenant address with this script.
* Update unit type at unit level- This should go to RM/CM for update ideally. If this is bulk update and no rent change. For rent change we need to take approval from RM/RVP based on Ticket requestor. When rent is changed then RM needs to run update unit rent function.
* Report scheduler set up.
* Update charge code for rentable items lease charges-rs\_sql\_Update\_LeaseCharges\_Chargecode\_for\_RentableItem.txt
* If Toolbox utility gives error for Move in, Moveout, Lease from & Lease To then we can change lease dates using this script- rs\_sql\_RPM\_Adjust\_Lease\_Dates\_20220513.txt
* Update unit availability date and ready dates at unit level for Vacant units with this script-rs\_sql\_Update\_Unit\_Availability\_Ready\_Dates.txt
* Moveout date modification requires notice date update on Tenant screen. We are doing this update manually from the front end.

*Tasks are not in Scope:*

* Unit market rent change-Update unit rent function run- This should go to RM for update.
* Any trans /detail related questions. Ledger adjustments, financial updates.
* Any security permission changes
* Update rentable item status function
* Workflow set up change
* Any master data set up changes without approval from RPM Team.

*Points To Be Noted:*

* User related queries to be sent to Shanette Silva.
* Packages to be sent to Shanette Silva and copy Aaron Cooper
* Copy Edwin Gomez on every email that be sent to Shanette.
* New job title/new group change at user level to be confirmed if that does not exist in document
* We need to instruct users to email TruAmerica directly at truamericasupport@realpage.com when there is property which is inactive and property notes say its TruAmerica property and they need access to this property for historic data.
* If there is a ticket for which there are more than twice email to and from then we can involve Shanette to the conversation and try to get on a call with user to understand better. Avoid to & from emails wrt tickets.
* For permission tokens we have to write to Shanette Silva.
* Marketplace tickets -Try to resync the user with property in the procurement setup. Ask the user to delete browser history, cache and try into new browser. Google chrome has recommended it.
* Check this document-SOP for New User addition-Master document- for New user creation
* If request receives from user where user is inactive, need to cross check if the user is inactivated by custom stored procedure by looking at User Memo & also need to check if the user is active in All employee listing, if user is not available in all employee list document, then confirm from Shanette for activating the user. We are sending this note to user for these tickets-We have a new security guideline in place, where if a team member hasn't logged into Yardi in the past 30 days, it will lock them.
* No access to be given to in acquisition property/list before prior confirmation from Shanette.
* For Make ready update in bulk we are using the script-rs\_sql\_Update\_Unit\_Availability\_Ready\_Dates and for updates which are not in bulk we ask to reach out to CM/RM.Make Ready dates are managed from the Community Dashboard in the Make Ready workflow. Please do not allow edits by anyone directly to the unit record.

# 

# Client user – Please refer the SOP

* The team already received RVP approval to add to the Yardi property. As long as the user is an active employee, the title/role line up, appropriate approver has signed off and the property is active in Yardi, access shouldn’t be questioned. Operations shares their team members across portfolios and regions quite regularly, we need to account for that.
* Email from Shanette 07/04/2023- All client users need to be marked Read Only access including existing users as well.

# FORMS/TEMPLATES TO BE USED

# N/A

# INTERNAL AND EXTERNAL REFERENCES

* 1. **Internal** **References**

N/A

* 1. **External** **References**

N/A

# CHANGE HISTORY

|  |  |  |  |
| --- | --- | --- | --- |
| **SOP** **no.** | **Effective** **Date** | **Significant** **Changes** | **Previous** **SOP** **no.** |
| V.07 | 08/01/2024 | New SOP | N/A |
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1. **PURPOSE**
2. **INTRODUCTION**
3. **SCOPE**
4. **RESPONSIBILITIES**
   1. **Chief/Principal** **Investigator**

# SPECIFIC PROCEDURE

* 1. **Version** **control** **and** **naming** **convention**
  2. **Other** **considerations**
  3. **Storage** **and** **archiving**

# FORMS/TEMPLATES TO BE USED

1. **INTERNAL** **AND** **EXTERNAL** **REFERENCES**
   1. **Internal** **References**
   2. **External** **References**
2. **CHANGE** **HISTORY**

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| --- | --- | --- | --- |
| **SOP** **no.** | **Effective** **Date** | **Significant** **Changes** | **Previous** **SOP** **no.** |
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