

# System Administration

12<sup>th</sup> June 2024 - Leeds



Your challenges  
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# System Admin Tasks

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- Maintaining Templates
- KPI's & Appraisal Calcs
- Applying LHA/LAR scripts
- Upgrading version
- Maintaining Reports
- Data Cleansing & House Keeping

# Templates

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- How often do you review templates?
- Updating Corporate assumptions & impact
- Defaults for accounts and cashflow timings
- Defaults for Timetable & Tasks

# Templates

## Key Corporate Assumptions

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- Development Interest
- Inflation Rates
- Long Term interest Rates
- Management, Maintenance & Major Repairs
- Staircasing Patterns
- Voids/Bad Debts rates

# Templates Defaults

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- Account & Ledger Codes
- Timetable Tasks
- Major Codes
- Custom Codes

# Templates Best Practice

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- Update inline with assumption reviews
- Create new interest, mortgage and inflation records
- Review defaults accounts and cashflow timings
- Update & review timetable tasks and status
- Test new functionality before applying one a typical project

# Templates Phasing & Cashflow Timings

- Phasing in Timetable
- Phased Cashflows
- Alternative Methods

# KPIs & Appraisal Calcs

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- **Do you still measure the same thing?**
- **Parameter settings**
- **Reporting from Appraisal calcs**



# KPIs & Appraisal Calcs

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- **Display KPIs in order of importance**
- **If changing parameter settings, create new appraisal calc spreadsheet and apply to new templates**
- **Create approval reports from Appraisal calcs**

# Annual Updates

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- LHAs
- LARs
- Target Rent Caps
- LHA, LAR & Target Rent Extrapolations (inflation)

# Annual Updates

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- LHAs - Updated in Oct/April script must be applied
- LARs – no longer apply?
- Target Rent Caps – January, manually or apply script
- LHA, LAR & Target Rent Extrapolations (inflation until completion) – manually

# Upgrading Your Version of Pamwin

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- **Assisted or go it Alone?**
- **DIY – Refer to the Guidance Note in the Support portal**
- **Assisted – work through the Upgrade Planner**

# Housekeeping

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- How big is your database?
- Old users – transferring projects
- Archiving – removes from search

# Questions?



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