

Gerald Eve Client Access System (CAS)

User Guidance Notes

February 2011

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1 System Requirements

The following system requirements should be available to you to ensure smooth access and use of the Gerald Eve Client Access System

- Internet connection via LAN, Broadband or other non-telephone dialup system. CAS can operate through a dialup connection but connection is likely to be slow;
- Machines should have at least Windows 98 (SE) installed with a 486/66 Pentium processor;

It should be noted that on some lower specification machines it may take a considerable length of time to run a report for a large number of properties.

- Internet Explorer 6 or above;

It should be noted that CAS has not been built to operate on any other web browser and full functionality is unlikely to be available, if access can be achieved at all.

- Adobe Acrobat reader version 6 or above;
- The ability to modify Trusted Sites within Internet Explorer;

Please refer to Appendix 2 for further information

- The ability to accept ActiveX controls;

Please refer to Appendix 2 for further information

- JavaScript and Cookies to be enable;
- Email client able to accept emails in HTML format;
- Excel 2000 or above.

2 Accessing the Client Access System

CAS can be accessed from the menu option on the Gerald Eve homepage, www.geraldeve.com - it appears as the item *Client Access* in the navigation menu on the left-hand side of the page.

2.1 LOGGING IN TO CAS

It is not possible to login to CAS unless your Gerald Eve contact has confirmed your access to CAS. This is to protect against unauthorised access to your information on our system.

Once your Gerald Eve contact has granted you access you will be sent an automated email from CAS advising you of your user name and password

The text will be similar to the example on the next page.

THIS IS AN AUTOMATED MESSAGE
DO NOT REPLY TO THIS MESSAGE AS IT IS GENERATED FROM A MAILBOX WHICH IS NOT MONITORED

Dear Client Access System user

Welcome to the Gerald Eve Client Access System Your new password is: 3E0G0.

You will be required to change this password the first time you log in to the Gerald Eve Client Access System.

Follow this link to log in: [Gerald Eve](#).

Should you have any queries regarding the Client Access System please speak to your usual Gerald Eve contact.

- Click on the link provided which will take you to the CAS Login screen
- Enter your user name – this is the email address you provided to your Gerald Eve contact
- Enter your password

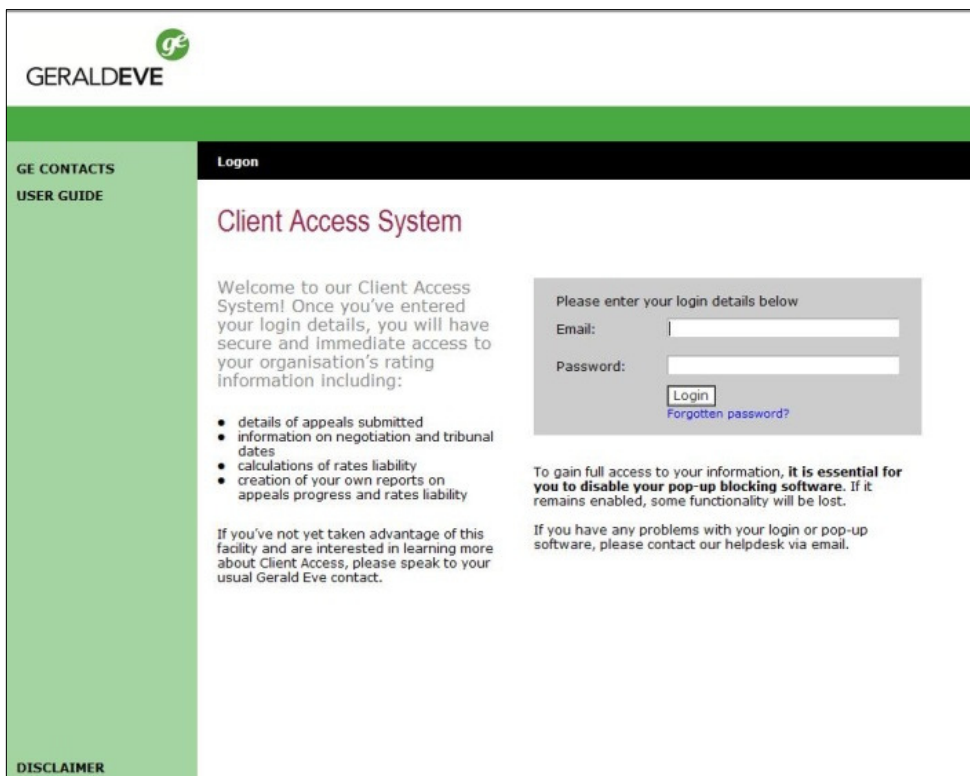
If this is the first time you are logging in to CAS you will be required to enter the password that was sent to you by email.

If this is not the first time you are logging in to CAS you should enter the password you chose the first time you logged on.

- Press **Login**

See screen shot 1 on page 5

Screen shot 1 – CAS Login



The screenshot shows the GERALDEVE Client Access System login page. The header includes the GERALDEVE logo and a green navigation bar. The left sidebar contains links for 'GE CONTACTS' and 'USER GUIDE'. The main content area is titled 'Client Access System' and includes a welcome message, a list of features (details of appeals submitted, information on negotiation and tribunal dates, calculations of rates liability, creation of own reports), and a disclaimer. A login form on the right prompts for email and password, with a 'Login' button and a link for 'Forgotten password?'. A note at the bottom right states that pop-up blocking software must be disabled for full access.

GERALDEVE

GE CONTACTS
USER GUIDE

Logon

Client Access System

Welcome to our Client Access System! Once you've entered your login details, you will have secure and immediate access to your organisation's rating information including:

- details of appeals submitted
- information on negotiation and tribunal dates
- calculations of rates liability
- creation of your own reports on appeals progress and rates liability

If you've not yet taken advantage of this facility and are interested in learning more about Client Access, please speak to your usual Gerald Eve contact.

Please enter your login details below

Email:

Password:

[Forgotten password?](#)

To gain full access to your information, it is essential for you to disable your pop-up blocking software. If it remains enabled, some functionality will be lost.

If you have any problems with your login or pop-up software, please contact our helpdesk via email.

DISCLAIMER

2.2 FIRST LOGIN

The first time you log in to CAS you will be asked to change your password and enter a password hint. (The password you choose must include both numbers and letters, and be at least 5 characters in length).

- Press **Update** to save these password changes
-

Screen shot 2 – Update Login Details



The screenshot shows the GERALDEVE Change Password page. The header includes the GERALDEVE logo and a green navigation bar. The left sidebar contains a link for 'USER GUIDE'. The main content area is titled 'Change Your Password' and includes instructions on how to change the password. A form on the right prompts for full name, current password, new password, new password confirmation, and password hint, with an 'Update' button.

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USER GUIDE

Change Password

Change Your Password

To change your password, please fill in the appropriate fields. The password must be between 5-30 characters long and contain a mixture of letters and numbers. Please also be sure to establish a number of hints that might help you remember your password such as a significant date, place or person.

Full Name: Charlotte Taylor

Current Password:

New Password:

New Password Confirmation:

Password Hint:

2.3 FORGOTTEN PASSWORDS

If you forget your password

- Click **Forgotten Password?** on the login screen

You will then be sent an email with your password hint. The text will be similar to the example below

You have requested a password hint from the Gerald Eve Client Access system.
Your password hint is
 'PET'

If this does not aid your memory, please contact Gerald Eve customer support: cassupport@geraldev.com to have it reset.

If you still cannot remember your password

- Email cassupport@geraldev.com to have it reset

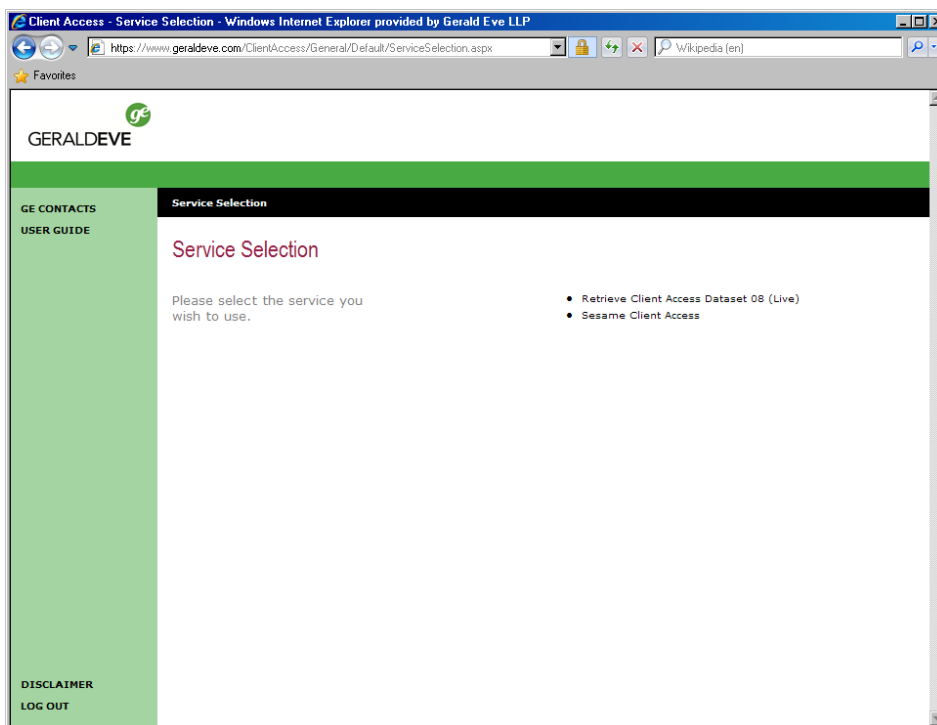
Any reset requests will be audited to re-confirm that access should be granted. As this is a manual process there may be some delay in responding to your request.

3 Service Selection

Once you have logged in to the Client Access portal, you may be presented with a choice of services. Clients of our corporate property management services may have been set up for on-line access to our Retrieve application which is one of the applications accessed via the Client Access portal.

If this is the case then you will need to select *Sesame Client Access* to open the rating application. If you are only set up for access to the rating application this selection screen is skipped and you will be taken directly to the Property Search screen.

Screen shot 3 - Property Search



4 Property Information

Once logged in you will be taken directly to the Property Search screen. Within the Property Search screen the GE Instruction(s), i.e. our reference number(s) for your rating work, to which you have access will be listed.

4.1 PROPERTY SEARCH

To view the properties you require within the GE Instruction, either

- Click on the appropriate GE Instruction

The GE Instruction field, on the right hand search criteria grid, will be populated with the GE Instruction number.

or

- Enter the desired search criteria in the right hand search criteria grid

Please refer to the Glossary within CAS or in Appendix 1 of this document for explanation of the fields.

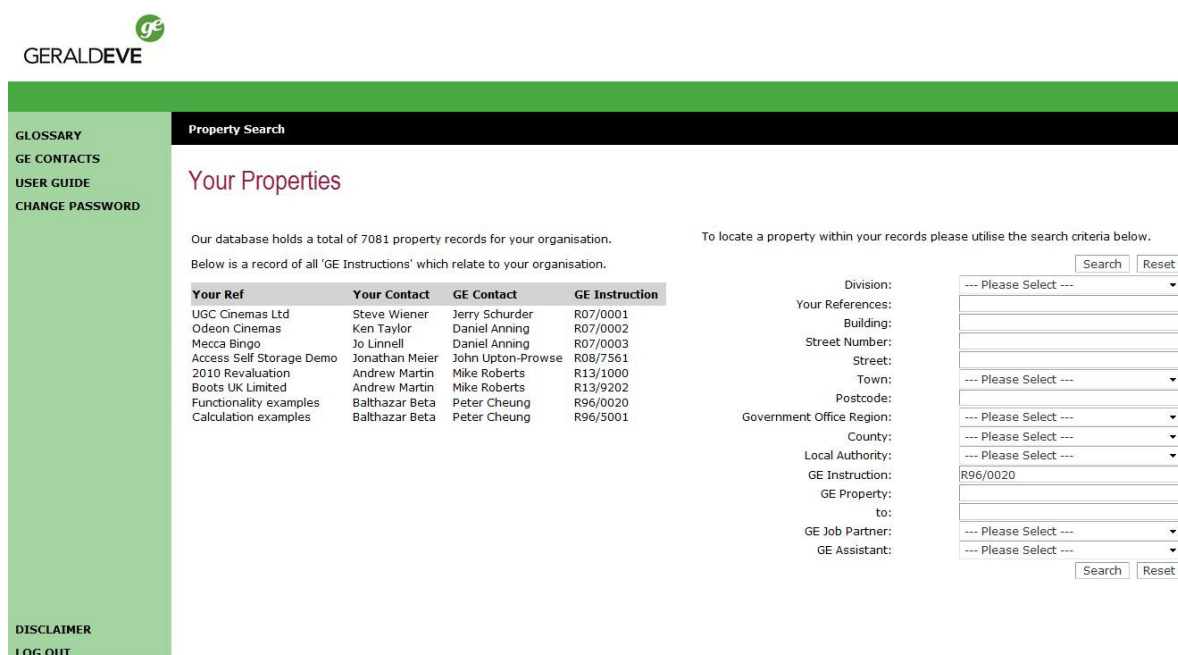
- Press **Search**

The search results will then be displayed.

To reset the search criteria grid

- Press **Reset**

Screen shot 4 - Property Search



Our database holds a total of 7081 property records for your organisation.
Below is a record of all 'GE Instructions' which relate to your organisation.

Your Ref	Your Contact	GE Contact	GE Instruction
UGC Cinemas Ltd	Steve Wiener	Jerry Schurder	R07/0001
Odeon Cinemas	Ken Taylor	Daniel Anning	R07/0002
Mecca Bingo	Jo Linnell	Daniel Anning	R07/0003
Access Self Storage Demo	Jonathan Meier	John Upton-Prowse	R08/7561
2010 Revaluation	Andrew Martin	Mike Roberts	R13/1000
Boots UK Limited	Andrew Martin	Mike Roberts	R13/9202
Functionality examples	Balthazar Beta	Peter Cheung	R96/0020
Calculation examples	Balthazar Beta	Peter Cheung	R96/5001

To locate a property within your records please utilise the search criteria below.

Division: --- Please Select ---
Your References:
Building:
Street Number:
Street:
Town: --- Please Select ---
Postcode:
Government Office Region: --- Please Select ---
County: --- Please Select ---
Local Authority: --- Please Select ---
GE Instruction: R96/0020
GE Property: to:
GE Job Partner: --- Please Select ---
GE Assistant: --- Please Select ---

Search Reset

4.2 PROPERTY SEARCH RESULTS

The results of your property search will be displayed on the search results screen.

From the results page you can either view details of an individual property by

- Clicking on the required property to view more details

This will take you to the Property Details screen, (see Screen shot 6 on page 11 for details).

or

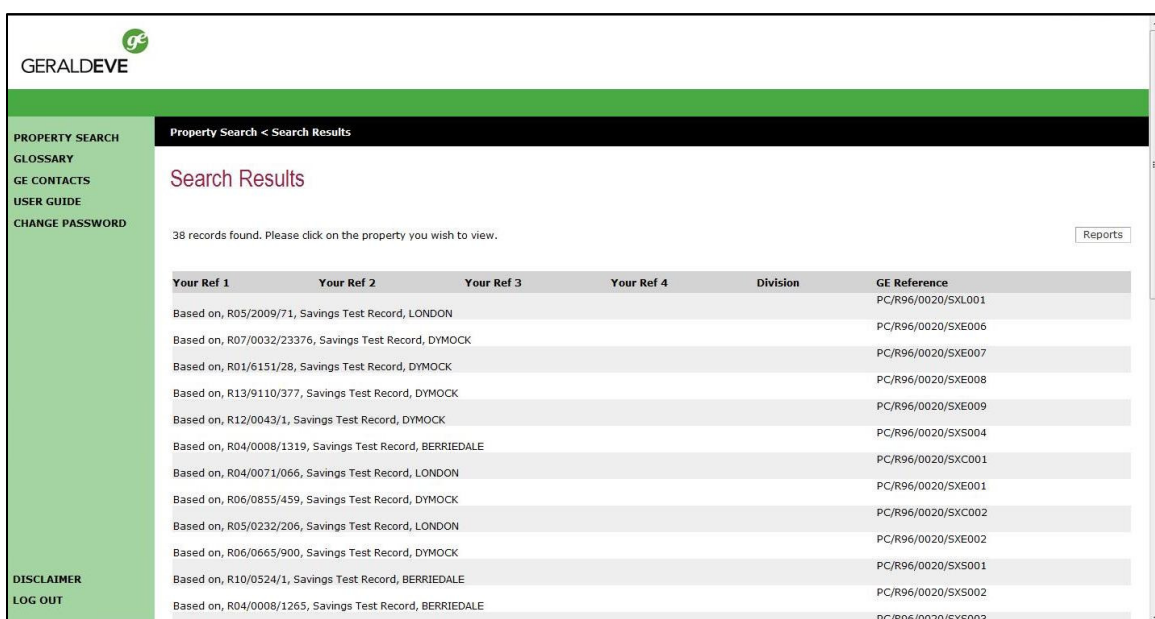
Prepare reports relating to all of the records, (see Section 5 for further information on report generation).

or

To return to the Property Search screen

- Select property search from the grey navigation toolbar at the top or left of the screen

Screen shot 5 - Search Results



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Property Search < Search Results

Search Results

38 records found. Please click on the property you wish to view. [Reports](#)

Your Ref 1	Your Ref 2	Your Ref 3	Your Ref 4	Division	GE Reference
Based on, R05/2009/71, Savings Test Record, LONDON					PC/R96/0020/SXL001
Based on, R07/0032/23376, Savings Test Record, DYMOCK					PC/R96/0020/SXE006
Based on, R01/6151/28, Savings Test Record, DYMOCK					PC/R96/0020/SXE007
Based on, R13/9110/377, Savings Test Record, DYMOCK					PC/R96/0020/SXE008
Based on, R12/0043/1, Savings Test Record, DYMOCK					PC/R96/0020/SXE009
Based on, R04/0008/1319, Savings Test Record, BERRIEDALE					PC/R96/0020/SXS004
Based on, R04/0071/066, Savings Test Record, LONDON					PC/R96/0020/SXC001
Based on, R06/0855/459, Savings Test Record, DYMOCK					PC/R96/0020/SXE001
Based on, R05/0232/206, Savings Test Record, LONDON					PC/R96/0020/SXC002
Based on, R06/0665/900, Savings Test Record, DYMOCK					PC/R96/0020/SXE002
Based on, R10/0524/1, Savings Test Record, BERRIEDALE					PC/R96/0020/SXS001
Based on, R04/0008/1265, Savings Test Record, BERRIEDALE					PC/R96/0020/SXS002
					PC/R96/0020/SXS003

PROPERTY SEARCH
GLOSSARY
GE CONTACTS
USER GUIDE
CHANGE PASSWORD

DISCLAIMER
LOG OUT

4.3 PROPERTY DETAILS

The property details screen is split into various areas.

- 1 Property address
- 2 Your own property references (if recorded) and information from the rating list
- 3 Gerald Eve references and information
- 4 Rating list details, baseline liability figure, interest/occupation effective from/to dates
- 5 Rating information, current RV and appeal information
- 6 Rate relief information
- 7 Void period information

To view more detailed information about the Rating information for the property

- Click on one of the rating records within section 5 of this screen

You will be taken to the Appeal Information screen, see Screen shot 7 on page 12 for further details.

Screen shot 6- Property Details

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Property Search < Search Results < View Property

Property Details

Example Organisation, Based on, R05/2009/71, Savings Test Record, LONDON

Your References and Property Information

Reference 1: SXL001
 Reference 2: SXL001
 Reference 3: SXL001
 Division: SXL001
 Local Authority: Westminster LBC
 BA Reference: SXL001
 Heredament Description: EXAMPLE & PREMISES
 Composite Property: No

Gerald Eve References

Instruction: R96/0020
 GE Property: SXL001
 Department: xGEPS Limited
 Job Partner: Peter Cheung
 Assistant: Peter Cheung
 Main Property Type: Other Agricultural

Rating List: RL2005

Rating Records Click a rating record to see the detail

Rating Action Suffix	RV In List (£)	Effective Date	Proposal Date	By	VO Appeal Ref	Agreed RV
A	3,356,000	31-Aug-2006	31-Jan-2007	Gerald Eve		3,144,500

Rate Reliefs

Start Date	End Date	Days	Relief	Type
------------	----------	------	--------	------

Void Periods

Start Date	End Date	Days	Relief	Type
------------	----------	------	--------	------

Property Details

1

2

3

4

5

6

7

Reports

No Photo Available

Your interest/occupation effective from: 31-Aug-2006
 Your interest/occupation ceased on: 31-Mar-2010

PROPERTY SEARCH
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DISCLAIMER
 LOG OUT

4.4 APPEAL INFORMATION

The appeal information screen contains detailed information about an appeal or rating list entry for the specific property. As the appeal progresses through the different stages the appeal programming section and settlement information will be updated.

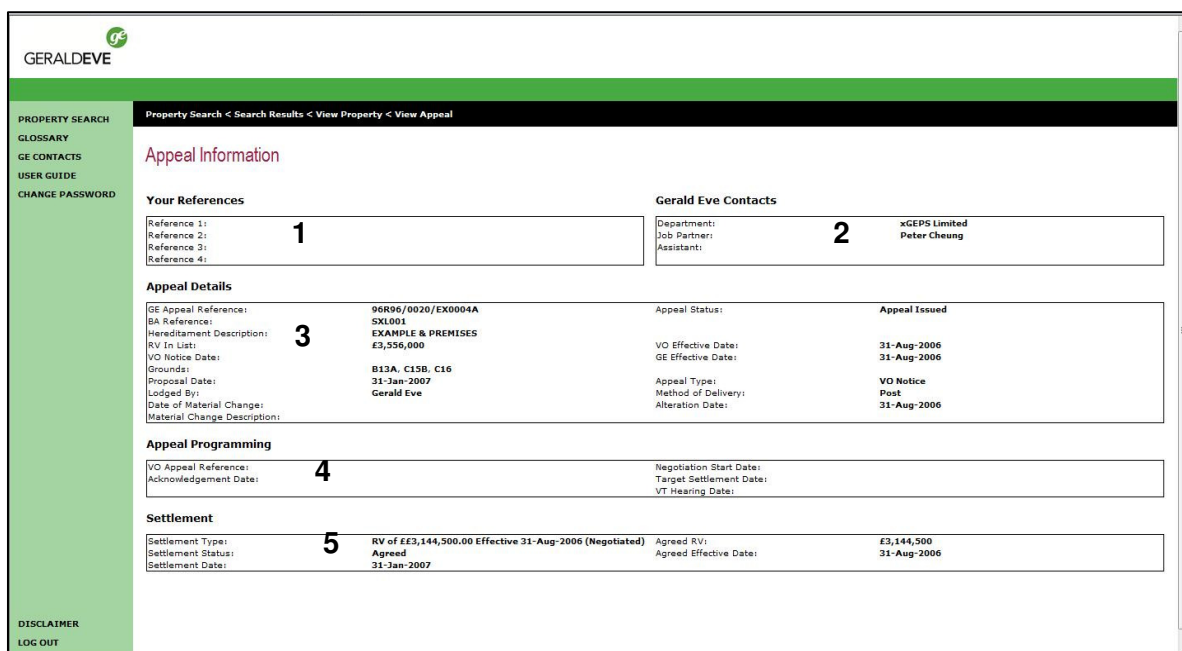
To access the Appeal Information for a property

- Select the required Rating Record from the Property Details screen

The Appeal Information screen is split into various sections

- 1 Your reference information (if recorded)
- 2 Gerald Eve Contacts – your contacts within Gerald Eve dealing with the particular appeal
- 3 Appeal Details - information about the appeal e.g. RV in List, Proposal Date and grounds for appeal on any appeal that has already been served
- 4 Appeal Programming – information about the progress of the appeal
- 5 Settlement – information about the settlement status and agreed RV

Screen shot 7 - Appeal Information



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PROPERTY SEARCH
GLOSSARY
GE CONTACTS
USER GUIDE
CHANGE PASSWORD

Property Search < Search Results < View Property < View Appeal

Appeal Information

Your References

Reference 1:	1
Reference 2:	
Reference 3:	
Reference 4:	

Gerald Eve Contacts

Department:	2	xGEPS Limited
Job Partner:		Peter Cheung
Assistant:		

Appeal Details

GE Appeal Reference:	96R96/0020/EX0004A	Appeal Status:	Appeal Issued
BA Reference:	SXL001	VO Effective Date:	31-Aug-2006
Inheritance Description:	3 EXAMPLE 8, PREMISES	GE Effective Date:	31-Aug-2006
RV In List:	£3,556,000	Appeal Type:	VO Notice
VO Notice Date:		Method of Delivery:	Post
Grounds:	B13A, C15B, C16	Alteration Date:	31-Aug-2006
Proposal Date:	31-Jan-2007		
Lodged By:	Gerald Eve		
Date of Material Change:			
Material Change Description:			

Appeal Programming

VO Appeal Reference:	4	Negotiation Start Date:	
Acknowledgement Date:		Target Settlement Date:	
		VT Hearing Date:	

Settlement

Settlement Type:	5	RV of ££3,144,500.00 Effective 31-Aug-2006 (Negotiated)	Agreed RV:	£3,144,500
Settlement Status:	Agreed		Agreed Effective Date:	31-Aug-2006
Settlement Date:	31-Jan-2007			

DISCLAIMER
LOG OUT

5 Reports

Reports can be generated for an individual property record or for a group of properties

1.1 Individual Reports

Individual liability reports can be viewed for a specific property by

- Selecting the Reports button on the Property Details screen
- Select the Rates Liability Report
- Select to Preview as PDF file

The report will open as an Adobe Acrobat file

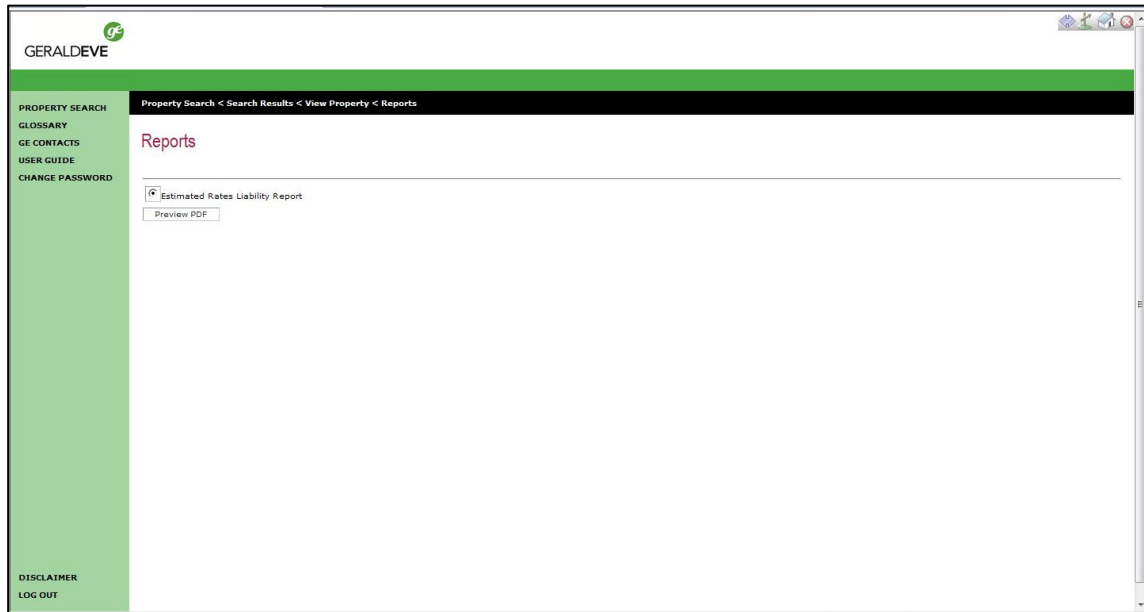
or

- Select to Save as a PDF file


Press Ok to both security messages that appear and select the location to which the file should be saved. See

Screen shot 9 page 15 for an example of an individual liability report

Screen shot 8 – Single Appeal Rates Liability Report



Screen shot 9 - Example of individual report

2005 RATING REVALUATION ESTIMATED RATES LIABILITY		 GERALDEVE
Example Organisation Based on R05/2009/71 Savings Test Record LONDON		
Rating Assessment Details		
Rateable Value as at	31-Aug-2006	£3,144,500 (Agreed)
Liability Details		
Rates payable from	31-Aug-2006	to 31-Mar-2010
Estimated Rates Liability based on RV in List		
	2006/2007	£794,559.15
	2007/2008	£1,396,158.00
	2008/2009	£1,452,759.00
	2009/2010	£1,525,082.50
	Total	£5,168,558.65

5.1 GROUP REPORTS (FOR A GROUP OF PROPERTIES)

Group reports can be generated for a range of properties

To create a global report

- Search for the properties to be reported on
- From within the Search Results screen select the Reports button
- Select the report type to be created
- Select the required sort order

The sort order will only apply to pdf reports. It is ignored for Excel report as Excel includes its own sorting facilities.

- View the report as a PDF file

The report will automatically open in Adobe Acrobat Reader. See Screen shot 10 page 16 for an example of a pdf report.

or

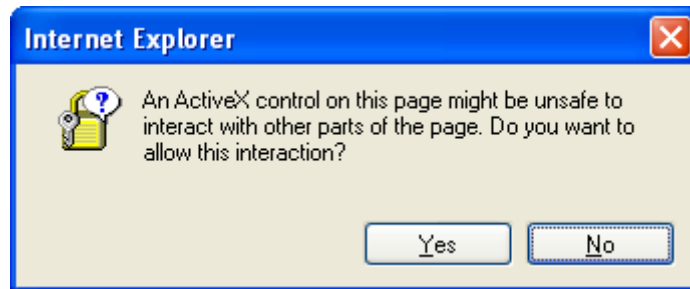
- Save as a PDF file

Click OK to the two security messages and then select the location to which the file should be saved. NB Your pop-up blocker should be disabled

or

- Select Excel
- Click **Yes** to accept Active X controls

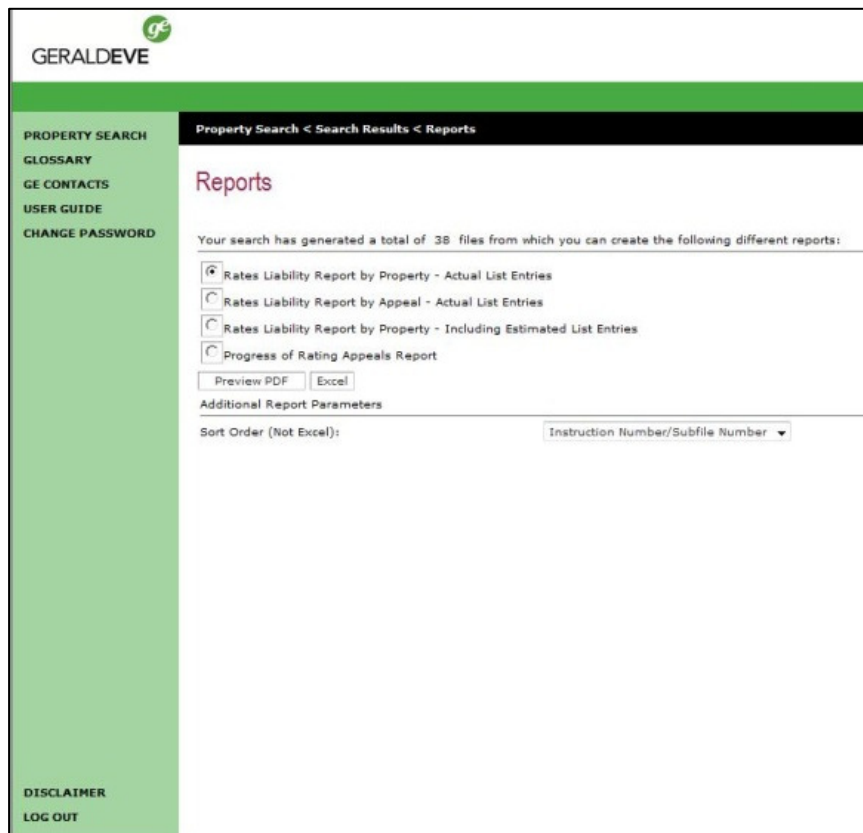
This interaction is safe and your Excel report will not open unless you allow the interaction



This will open the report in Excel

If you have difficulties opening an Excel report please refer to Appendix 2 – Running Excel Reports

Screen shot 10 – Creating a group liability report



Screen shot 11 – Example of a group liability report

2005 RATING REVALUATION - ESTIMATED RATES LIABILITY as at 07 February 2011									
Example Organisation									
Property	Hereditament Description	Baseline Liability	Rateable Value	Effective Date	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
Based on, R04/0071/066, Savings Test Record LONDON	EXAMPLE & PREMISES	Liability Commenced: 01-Apr-2005; Liability Ceased: 31-Mar-2010 £40,812.00	£97,500 A £105,000 A	01-Apr-2005 01-Dec-2006	£41,437.50	£43,694.01	£47,040.00	£48,930.00	£51,345.00
GE Ref: PCR96/0020/SXC001									
Based on, R05/0032/206, Savings Test Record LONDON	EXAMPLE & PREMISES	Liability Commenced: 31-May-2006; Liability Ceased: 31-Mar-2010 £15,960.00	£26,000 A	01-Apr-2005	£0.00	£8,578.58 (V)	£11,687.19	£12,116.00	£12,714.00
GE Ref: PCR96/0020/SXC002									
Based on, R07/0019/16993, Savings Test Record LONDON	EXAMPLE & PREMISES	Liability Commenced: 01-Apr-2005; Liability Ceased: 31-Mar-2010 £49,704.00	£85,000 A £76,500 A	01-Apr-2005 06-Jun-2005	£41,946.46	£37,070.47	£34,272.00	£35,849.00	£37,406.50
GE Ref: PCR96/0020/SXC003									
Based on, R06/0055/459, Savings Test Record DYMCK	EXAMPLE & PREMISES	Liability Commenced: 01-Apr-2005; Liability Ceased: 31-Mar-2010 £76,644.48 C	£230,000 A £275,000 A	01-Apr-2005 01-Apr-2006	£97,060.00	£119,075.00	£122,100.00	£127,050.00	£133,375.00
GE Ref: PCR96/0020/SXC001									
Based on, R06/0065/900, Savings Test Record DYMCK	EXAMPLE & PREMISES	Liability Commenced: 01-Apr-2005; Liability Ceased: 31-Mar-2010 £208,957.90 C	£362,500 A	01-Apr-2005	£152,975.00	£156,962.50	£160,950.00	£167,475.00	£175,812.50
GE Ref: PCR96/0020/SXC002									
Key: A: Agreed or Determined, T: Takunal Decision, W: Withdrawn, C: Certificate applies P: Partial occupation allowance, R: Charitable or other relief, V: Void or empty rate allowance									
Report ID: CR025									
Page 1 of 8									

6 Other components of CAS

6.1 USER GUIDE

A copy of this user guide can be access electronically by clicking User Guide on the left menu bar.

6.2 GLOSSARY

The glossary of terms used in the Client Access System can be accessed by

- Selecting **Glossary** from the left menu bar

The Glossary will open in a new window.

Use your keyboard to jump to specific letter of the alphabet or scroll through the list using your mouse.

A copy of the glossary can also be found in Appendix 1 of this document.

6.3 YOUR CONTACTS

The “Your Contacts” option in the menu bar takes you to the contacts section of the main Gerald Eve website, through which you can search for a specific contact and find email address and telephone number.

6.4 CHANGE PASSWORD

This takes you to the change password screen as displayed upon your first login.

Use this screen to change your password, see page 5 for further details. You may change your password at any time.

6.5 LOGOUT

Use this to logout of the CAS system. Press Ok and then Yes to confirm you wish to logout of CAS.

Appendix A

Glossary of terms

%	The % of relief or void period to be applied
Acknowledgement Date	The date which the VO acknowledged receipt of the appeal
Agreed Effective Date	The date from which the Agreed RV takes effect
Agreed RV	This is the RV that has been agreed with the VO
Alteration Date	The date on which the VO updated the rating list
Appeal Grounds	<p>B13A - reduce RV</p> <p>B13B - delete assessment</p> <p>B13C - split assessment</p> <p>B13D - merge assessments</p> <p>B13E - change effective date</p> <p>B13F - other change to assessment</p> <p>B14 - enter into rating list</p> <p>C15A - compiled list incorrect</p> <p>C15B - challenge VO alteration</p> <p>C15C - effective date incorrect</p> <p>C15D - material change of circumstances</p> <p>C15E - no longer exists</p> <p>C15F - exempt</p> <p>C15G - deletion for other reason</p> <p>C15H - should be more than one assessment</p> <p>C15I - should be different assessment</p> <p>C15J - should be rateable</p> <p>C15K - VT decision</p> <p>C15L - wrongly described</p> <p>C16 - detailed reasons supplied</p> <p>SCHED - a schedule of proposed changes supplied</p>
Appeal Type	The type of appeal sent to the VO (the appeal type is determined by the grounds of appeal)

Assessment No	This is the reference number provided by the local authority to identify the property
Assistant	See GE Assistant
Baseline Liability	The liability value derived from the previous list upon which transitional liability calculations are based. This is not necessarily the same as the actual amount paid in the previous list.
By	The party which submitted the appeal. This is normally Gerald Eve unless it was submitted by another company before the record was transferred to Gerald Eve
Composite Property	If set to "yes" the property includes a residential element; if set to "no" the property is a wholly non-domestic property.
County	Administrative counties
Date of Material Change	The day on which a change which affects or may affect rateable value took place.
Days	The number of days between the start and end dates of an allowance or liability period.
Description	The description of the property as recorded in the rating list.
Division	If your company has subsidiary companies or groups its properties in a particular way this may be used by Gerald Eve to identify those companies or groupings
Effective Date	The date the RV in list came into effect.
End Date	The date the relief and/or void period ends
GE	Gerald Eve
GE Appeal Ref	The unique GE reference automatically generated upon issuing an appeal.
GE Assistant	A Gerald Eve surveyor responsible for the property record(s) if not the partner directly.
GE Contact	Your main contact within Gerald Eve
GE Instruction	The GE reference for an overall instruction
GE Partner	The Gerald Eve partner responsible for the property record(s)
GE Property	This is an individual client property record linked to a specific instruction
GE Rating Suffix	The individual rating appeal reference
GE Reference	This is the unique reference used by GE to identify an individual property or appeal record.
Government Office Region	The standard Government Office Regions of England, plus Scotland and Wales.
Grounds	These are the grounds upon which the appeal was or will be submitted to the VO
Interest/Occupation Ceased	This is the date occupation of or interest in the property ceased, if

From	during the currency of the 2005 Rating List/Roll
Interest/Occupation Effective From	This is the date occupation of or interest in the property commenced, if after the start of the 2005 Rating List/Roll
Local Authority	English, Welsh and Scottish local authorities responsible for billing.
Main Property Type	This is the main property use
Method of Delivery	Whether the appeal was sent to the VO by post, fax or electronically
Negotiation Start Date	The date provided by the VOA or the earliest they expect to commence negotiations.
Partner	See GE Partner
Postcode	Post code where known. (Note the post code used by the VO often differs from that which you may have been allocated as a volume post user)
Proposal Date	The date the appeal document was sent to the VO
Rate Reliefs	The time period for which the property qualifies for a discount on rates payable
Rating List	A list of all RV entries and appeals made in respect of the property.
Rating Records	Wherever an appeal is agreed or where a £0 RV is recorded an indication of whether the property has been deleted or is zero rated.
RV (£)	Rateable Value
RV in List	The current list RV for the specific property as recorded by the VO in the Rating list or Scottish Valuation Roll
Settlement Date	The date the appeal was agreed with the VO
Settlement Status	If the agreed RV is greater than £0 then this will be set to "Agreed". If the agreed RV is set to £0 then it is set to "Deleted" if the property has been deleted from the list or "Zero Rated".
Settlement Type	This is how the settlement was reached with the VO, i.e. whether the RV was negotiated; the appeal was withdrawn; the VO considered the proposed RV as acceptable; or the RV was determined through a tribunal decision.
Start Date	The date the relief and/or void period commences
Street	Street Name (excluding number)
Street Number	Building Number
Target Settlement Date	The date by which the VO has targeted completion of all negotiations prior to recourse to a Valuation Tribunal hearing
Town	Postal Town (These are limited to the 1500 postal towns recognised by the Post Office – any other name by which a location is known is likely to be a dependent locality)

Type	The type of rate relief or void period
VO	Valuation Offices in England and Wales or the Assessor in Scotland
VO Appeal Ref	This is the case reference the VO provides upon acknowledgement of the appeal document.
VO Notice Date	The date on which a notice is issued to an occupier advising an alteration to the Rating list.
Void Periods	The time period during which the property is exempt from rates or qualifies for unoccupied rates
VT	Valuation Tribunal in England and Wales or Valuation Appeal Committee in Scotland.
VT Hearing Date	The date the appeal is listed for hearing by the VT or citation date for VAC in Scotland
Your Contact	The main contact within your company for the Instruction
Your References	The references provided by the client which you know or accord the property.
Your Reference 1	The main reference provided to us by you for the property
Your Reference 2	An additional cross reference provided to us by you for the property

Appendix B

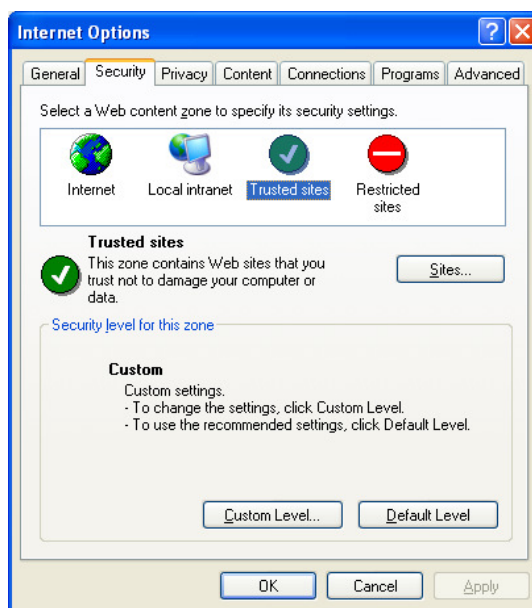
Running Excel reports

Before you can run an Excel liability report within Gerald Eve Client Access you will need to ensure that the Sesame Rating website is set in your trusted site list:

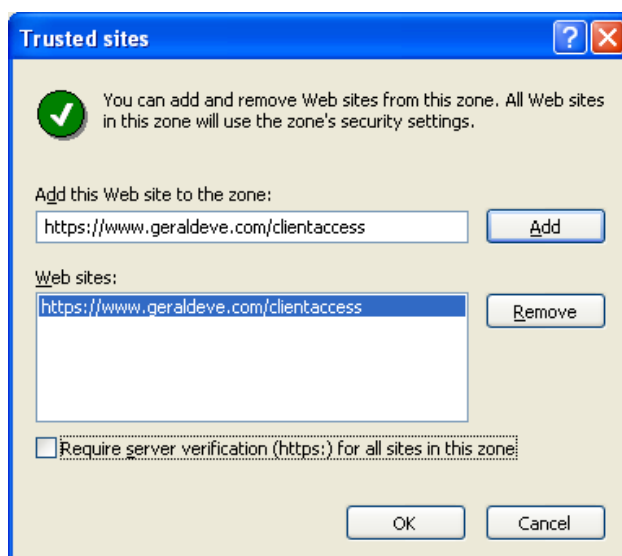
To set Sesame Rating as a trusted site

- Launch Internet Explorer
- From the menu bar select **Tools** then **Internet Options**

This will open the Internet Options dialog box



- Select the **Security** tab
- Click on **Trusted Sites**
- Press the **Sites** button



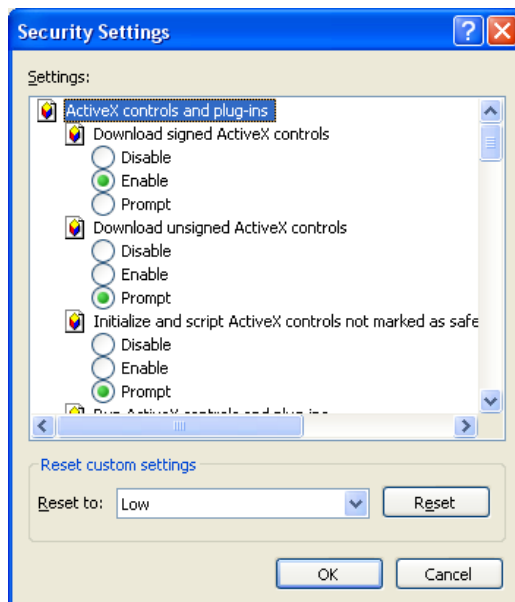
- Uncheck **Require server verification (https:)** for all sites in this zone
- Add **https://www.geraldeve.com/clientaccess** to the **Add this Web site to the zone** textbox.
- Press **Add**
- Press **Ok**

This will confirm the changes and return to the Internet Options dialog box

To ensure that Excel can open on your machine

- Within in the **Security** tab select **Trusted Sites**
- Select **Custom Level**

This will open the custom security settings dialog box



- On **Security** tab, ensure **Trusted Sites** is selected
- Click **Custom Level**
- Set **Initialize and script ActiveX controls not marked as safe** to **Prompt**
- Press **Ok**

This will confirm the changes and return you to the Internet Options dialog box.

- Press **Ok**

This will close the Internet Options dialog box.