

ARCHIBUS Datasheet - Portfolio Management

Improve the analysis and management of real estate assets to align the portfolio with the organisational mission

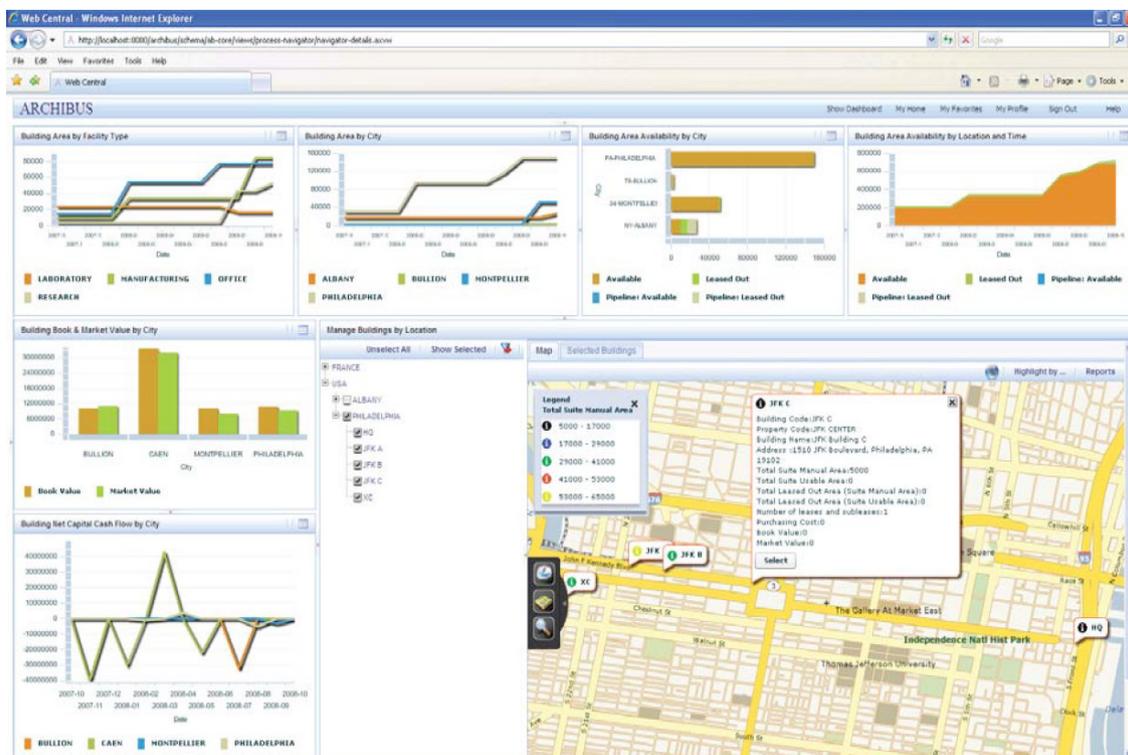
A centralised repository of accurate, easily accessible information is the foundation for strategically managing a real estate portfolio.

Web-based ARCHIBUS Portfolio Management helps streamline data collection and analysis by accurately aggregating individual portfolio items to create a consolidated portfolio view.

The application tracks current and projected holdings, leased versus owned space, building cost performance data, and more, to enable insightful planning and execution. Drill-down capabilities, graphical and geographic dashboards, KPI charting, and personalised views also help users visualise and analyse data to make fact-based decisions on the portfolio's ability to fulfill the organisational mission.

Benefits

- Improves asset stewardship through comprehensive tracking and analysis of portfolio holdings
- Provides multiple perspectives on portfolio performance to enable rapid, fact-based decisions
- Enhances root cause analysis to sustain appropriate service levels
- Reduces administrative costs through quick and intuitive data entry



The Portfolio Manager offers multi-view capabilities for switching between land, structures and buildings portfolio analyses, incorporates graphical and GIS information, and delivers consolidated capital transaction data using the view

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Improve Real Estate Stewardship

Web-based ARCHIBUS Portfolio Management enables the centralised collection, analysis, and sharing of real estate portfolio information. The creation of a common operating framework of land, structures, buildings, and leases makes possible more collaborative, and better informed decision-making. Optional GIS functionality delivers map-based perspectives of properties for improved visualisation and analysis. The result is an organisation that is finally in complete command of accurate property and performance information.

- Improve portfolio inventory accuracy with a Web-based, centralised system that streamlines collection and accessibility of portfolio information
- Add sophisticated data analysis through benchmarking, KPIs, trend analysis, projections, and other means to improve portfolio performance
- Increase data transparency through extensive drill down capabilities from the portfolio level to the individual portfolio item
- Support optimisation of the real estate portfolio, ensuring future needs are met within budget

Facilitate Better Decision-Making

Portfolio Management offers a rich set of graphical tools to view the real estate portfolio in its entirety, or by specific criteria, giving managers a comprehensive view of property details to effectively communicate challenges and opportunities to C-level management. In addition to dedicated dashboards for each category of property, the application supports interactive KPI charting for aggregated portfolio information, as well as easily personalised views which present a filtered geographic list of portfolio items.

- Visualise the total impact and effectiveness of real estate spending and rationalisation across business units
- Incorporate building, structure, land, and overall portfolio dashboards for consolidated views with capital data
- Support portfolio analysis with KPI charting based on consistent information relating to geography, type of space use, area availability, owned versus leased space, and more
- Easily display views to represent filtered lists of portfolio items, according to criteria such as purchase price or total leased area

Enhance Root Cause Analysis

Portfolio managers who want to identify opportunities and proactively avoid problems can do so with ARCHIBUS Portfolio Management. For example, when an unanticipated increase or decrease in available space occurs, users can quickly drill down to the portfolio single-item level to find the root cause. This ability to stay on top of day-to-day operations, spot trends, and analyse spending in near real-time enables responsive management. The application enables users to address current problems while anticipating future needs.

- Improve root cause analysis to easily isolate problems and uncover potential opportunities
- Allow managers responsible for real estate assets to be in command of portfolio details and act proactively to provide better customer service
- Empower business unit managers to easily review assets and space assigned to them so they can help rationalise capacity no longer needed in their unit
- Integrate with other applications in the ARCHIBUS suite, such as Capital Budgeting, Project Management, Space Management, and Move Management, to assist in the execution of portfolio optimisation

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Reduce Data Entry Time and Errors

Portfolio Management reduces administrative costs by streamlining portfolio data entry with a Data Entry Wizard to improve speed and accuracy. The Wizard supports an easy step-by-step data entry process that enhances the ability to maintain an accurate data repository so that portfolio information always remains current and actionable, supporting the strategic decision-making process.

- Define new portfolio items or edit existing ones. Easily define the Data Entry Wizard
- Increase data entry speed and accuracy with the Data Entry Wizard to reduce manual effort needed to perform data entry and maintenance tasks
- Move effortlessly through the steps necessary to add, modify, or delete portfolio information using dynamic tabs

Activities and Summary Tables:

- *Management by portfolio type: building, structure, land*
- *Building/land area by facility type/time period*
- *Buildings/land area by time period and location*
- *Buildings/land area availability by location and time period*
- *Building, structure, land, and overall portfolio dashboards*
- *Data grouping by geography, area usage, area availability*
- *Timeline analyses*
- *KPI charting and benchmarking*
- *Drill down capabilities*
- *Geographical tool to link to GIS capability*

Plus many more...

ARCHIBUS Datasheet - Real Property and Lease Management

Track and evaluate your properties' operational and financial performance on an individual or portfolio basis

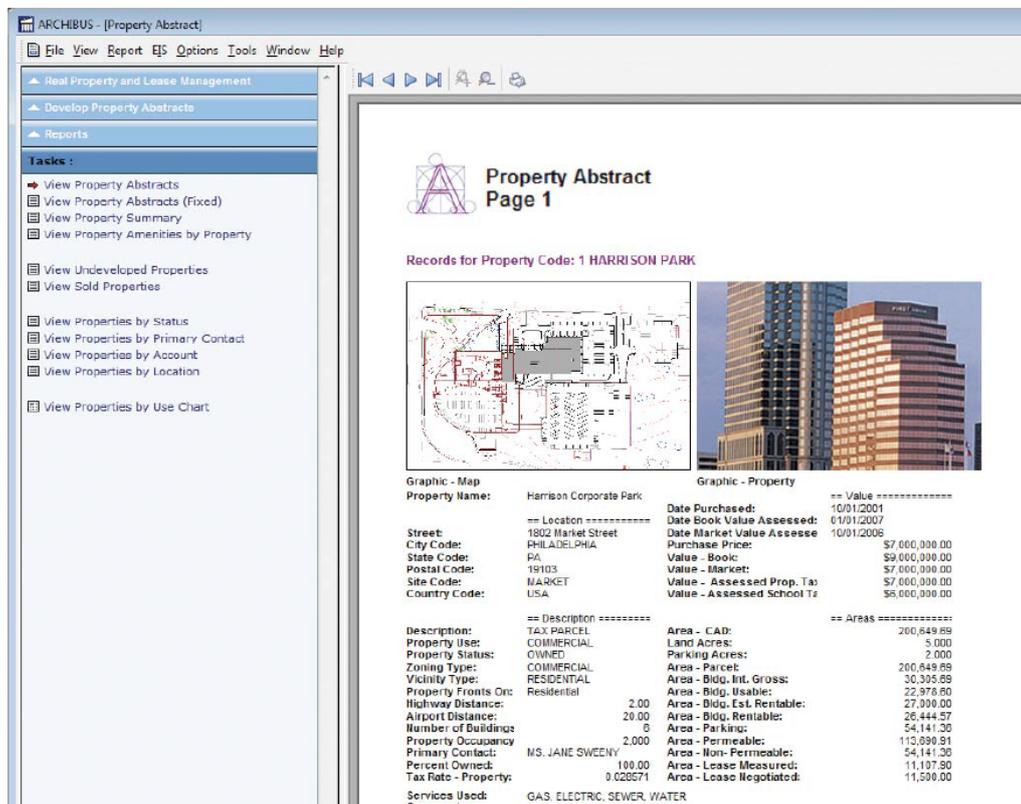
Real estate is often an organisation's highest value asset, so it is critical to recognise the cycles and trends that impact your properties and develop a strategic plan to address risks and opportunities.

As your organisation makes decisions about its property portfolio - such as leasing, acquisition, and disposition - it is crucial to quickly access accurate information on which to base these choices.

The ARCHIBUS Real Property and Lease Management application lets renters, lessors or owners record, manage, and analyse detailed real estate and lease information to assess the portfolio, mitigate risk, and improve profitability.

Benefits

- Improves performance of leased and owned properties through financial and operational benchmarking
- Generates summary reports to forecast opportunities and identify investment risks
- Accelerates property return-on-investment by optimising space utilisation
- Incorporates GIS capabilities for graphical portfolio representation to improve analysis of real estate metrics



Property Name: Harrison Corporate Park		Date Purchased: 10/01/2001	
Location: 1802 Market Street		Date Book Value Assessed: 01/01/2007	
City Code: PHILADELPHIA		Date Market Value Assessed: 10/01/2008	
State Code: PA		Purchase Price: \$7,000,000.00	
Postal Code: 19103		Value - Book: \$9,000,000.00	
Site Code: MARKET		Value - Market: \$7,000,000.00	
Country Code: USA		Value - Assessed Prop. Tax: \$7,000,000.00	
		Value - Assessed School Tax: \$8,000,000.00	
Description:		Area - CAD:	
Property Use: COMMERCIAL		200,849.89	
Property Status: OWNED		Land Acres: 5.000	
Zoning Type: COMMERCIAL		Parking Acres: 2.000	
Vicinity Types: RESIDENTIAL		Area - Parcel: 200,849.89	
Property Fronts On: 2.00		Area - Bldg. Int. Gross: 30,305.89	
Highway Distance: 20.00		Area - Bldg. Usable: 22,376.60	
Airport Distance: 9		Area - Bldg. Est. Rentable: 27,000.00	
Number of Buildings: 2,000		Area - Bldg. Rentable: 26,444.57	
Primary Contact: MS. JANE SWEENEY		Area - Parking: 54,141.30	
Percent Owned: 100.00		Area - Permeable: 113,690.91	
Tax Rate - Property: 0.020571		Area - Non-Permeable: 54,141.30	
Services Used: GAS, ELECTRIC, SEWER, WATER		Area - Lease Measured: 11,107.80	
Comments:		Area - Lease Negotiated: 11,300.00	

The Property Abstract report summarises fundamental property information, including its assessed value, areas, and images

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Align Real Estate Plans with Business Plans

Review current and upcoming vacancies to better plan leasing options and opportunities. Whether it is time to expand, sell, or terminate leases, the application provides important information such as property vacancies and accurate space measurements. Calculate standards across multiple properties, such as cost per occupant or cost per square foot or meter. The figures are derived from a consistent summary source, making it easy to compare these various criteria. ARCHIBUS Real Property and Lease Management gives you the power to leverage this information when negotiating leases or purchase prices.

- Limit risk by using automated ticklers to warn when lease options expire, activities are due, or tenant leases are expiring
- Provide detailed property abstract reports and statistical summaries
- Negotiate contracts using cost history reports based on maintenance and management expenses
- Locate vacant suites at a glance for future tenants

Monitor Property Costs and Conditions

Account for all costs associated with property management and justify new expenditures. For example, you can determine projected operating costs for each owned or leased property, including any property taxes. Chargeback features let you charge departments or other entities for their proportionate share of a tax bill, based on the amount of space they occupy. Closely monitor taxes by incorporating a tax budget and projection plan with tickler reports to remind you of assessments and tax payment dates. In addition, you can cross reference invoices to lease agreements as a way to ensure accuracy. In this way, both Operations and Accounting departments can make better real estate related decisions.

- Ensure regulatory compliance by tracking requirements, recording compliance issues, and maintaining a record of requirements to avoid financial penalties
- Record property tax expenses and prepare budgets for future tax payments
- Evaluate the profitability of your properties and overall financial portfolio
- Record and analyse trends of any given property for making future business decisions

Evaluate and Optimise Space Usage

Determine how efficiently your space is being used by integrating intelligent CAD plans with your real estate database. Create occupancy plans, master lease and stacking diagrams to highlight vacant, rentable space, or to identify and reclaim space that is currently not included in any negotiated lease area. The application also helps ensure that each department contributes appropriately to property expenses. Its flexible chargeback features will proportionally distribute charges among tenants according to the area they occupy.

- Document all lease-related costs and charge them to the appropriate departments or tenants
- Call up a general overview of all your properties, and highlight details on outstanding issues
- Track total holdings across regional and/or national boundaries, organising properties by geographical area
- Seamlessly track depreciation of property assets with the integrated ARCHIBUS Furniture and Equipment Management application

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Enhance Functionality with GIS Deployment

The Real Property and Lease application can take advantage of the ARCHIBUS Geospatial Extensions for ESRI and enable portfolio managers to get an improved, "real world" context for their real estate decisions.

- View your property vacancies, lease expirations/renewals, and other key performance indicators within an integrated, three-dimensional picture
- Easily correlate geospatial information such as street maps, satellite data, and demographics to your own portfolio of properties, leases, buildings, and assets
- Leverage geospatial information to plan and strategise your real estate portfolio goals

Activities and Reports include:

- *Property abstract*
 - *Property summary*
 - *Property cost analysis*
 - *Budget project by property*
 - *Cash flow*
 - *Leases and base rents*
 - *Leases and options*
 - *Leases coming due alerts*
 - *Options coming due alerts*
 - *Highlight vacant suites*
 - *Overdue taxes*
 - *Tax cash flow*
 - *Highlight regulation areas by property*
 - *Depreciation schedules for property assets*
 - *Property cost projections*
 - *Lease financial summary*
- Plus many more...*