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Collaborative Web Solution for a Leading Real Estate Firm

Create collaborative system to manage properties and leases and increase the efficiency of business processes

Client

The client is a leading commercial real estate company with a portfolio exceeding $1.4 billion in assets. The company leases over 12 million square feet of retail space. The company caters to a diverse client roster and coordinates every aspect of retail leasing, development, acquisition, financing, architectural design, marketing, space planning, and property management.

The company follows disciplined business processes to expand their services in Retail Leasing, Tenant Representation, Land Brokerage, Commercial Development and Property Management.

Objective

The client required a collaboration environment that increases the business efficiency of the company's business processes. The web based software was required to handle the administrative tasks to manage the properties, all related documents and other information. The software also required an easy search feature that enables the users of the system to efficiently search information regardless of the physical location of data.

The conventional method for leasing followed by the client required maintaining paper documents at each level of approval. Each level of approval, if required had to go through multiple approval cycles to reach a consensus on the lease. This resulted in multiple documents for a single lease. Storing all the documents for a single lease and then searching for specific information in all these documents became cumbersome.

The previous method of working required all approvers to maintain separate documents which resulted in difficulties in consolidating the information which in turn resulted in tedious job of searching the most important information for the lease throughout these multiple documents. On top of these difficulties, the storage needed to store all the paper documents for all the leases took considerable amount of space.

The client needed a solution that integrates the following:

- Different user roles
- Electronic approval for all stages in the workflow
- Document management
- Management and Monitoring Tools
    - Reporting on all stages of the workflow
    - Customizing the workflow tasks
    - Deletion and Delegation of workflow tasks

Project Deliverables

Lease Request Process workflow

Input form at various stages of the flow

Reporting Dashboard

Roles Pages

Custom Web Parts

SharePoint 2013 and Nintex Workflow

Generation of lease abstract in word format from the information collected in the workflow

Migration from SharePoint 2010 to SharePoint 2013

Branding of the Site

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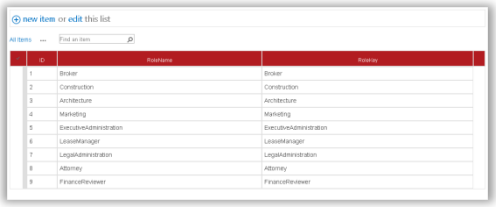
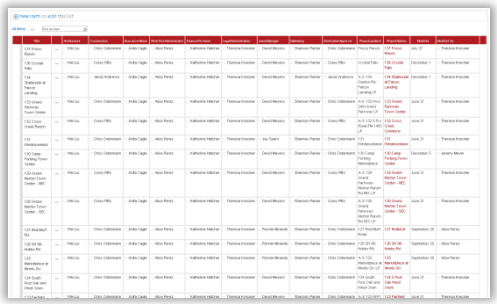
Solution

The solution required to implement the manual workflow in a centralized system with role based access. The different users of the system were aligned into their respective roles.

For example, the Brokers can initiate the Lease Workflow. The Construction user is given the authority to prepare the construction budget and schedule. The COO user is responsible to review the financials. And so on.

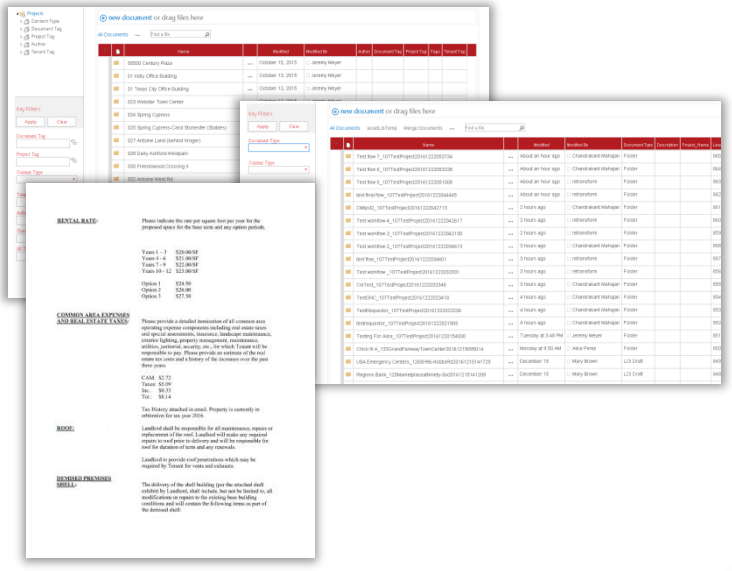




Each stage of the workflow is remembered and can be recalled or the workflow can be re-started from a specific stage in the workflow cycle.

Each user is notified through email and in the solution, in the user's dashboard, of any pending tasks/approvals required to be performed by the user at any stage of the workflow. This eliminated the need to manually follow up with users to get the workflow going ahead.

The electronic submission of documents and maintaining of the information in the document management system enabled quick gathering of the most relevant information in the lease. The client did not have to now search for information across various document. The solution abstracted the most important information into a small 4-5 page PDF for easy reference. In addition, the search feature enabled the users to quickly search for information.



Tools & Technology

SharePoint 2010 / 2013

Active Directory

Office Web Apps

SQL Server 2012

Nintex Workflows

SharePoint 2013 Workflows using Workflow Manager 1.0

Visual Studio 2013

.NET, JavaScript, JQuery, Bootstrap

Open XML and Microsoft Word API

SSIS

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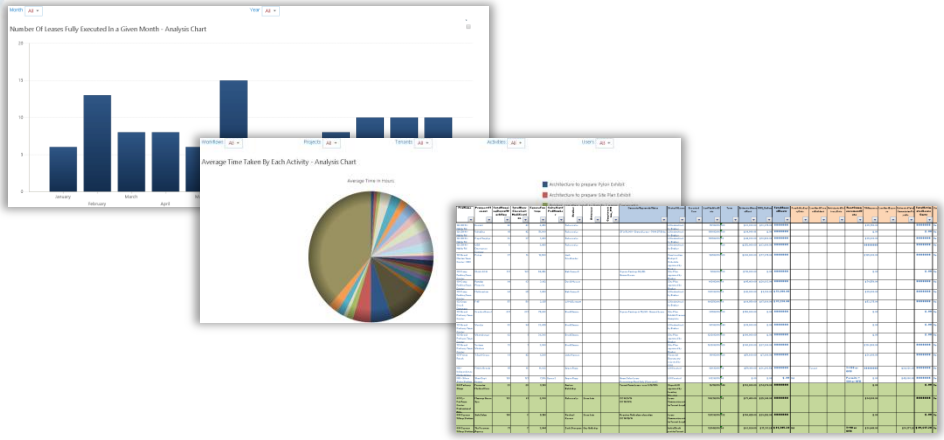
The solution has in-built monitoring and management tools that the client uses for assigning user roles, updating workflow stages, assigning approvals, reviewing performances of different users, and more.

The reports generated by the solution gives a detailed view of all the tasks in the workflow. The reports can also be exported to Excel.



Benefits

Our solution with custom built workflows, document management tools, automated reporting, and real time management tools made the management of properties a simple task. The solution reduced the time and cost to manage and retrieve the property and other information.

Conclusion

The solution was delivered to the client on time and to budget with a comprehensive report that was presented to senior client representatives.

The solution removed the need of manual entry of lease information and reduced the most important information to just four pages.

The administrators now save time and get the accurate information using the Dashboards and other Management and Monitoring Tools.

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