





Collaborative Web Solution for a
Leading Real Estate Firm



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



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.



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

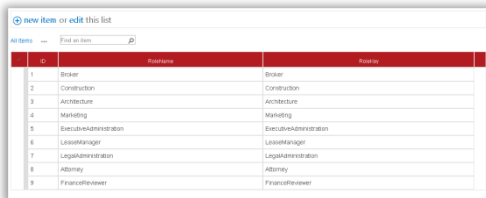
Generation of lease abstract in word format from the information collected in the workflow

Migration from SharePoint 2010 to SharePoint 2013

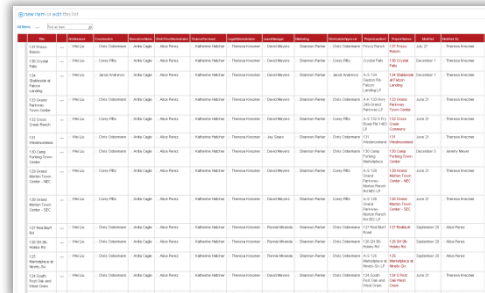
Branding of the Site

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.



ID	RoleName	RoleName
1	Broker	Broker
2	Construction	Construction
3	Architecture	Architecture
4	Marketing	Marketing
5	ExecutiveAdministration	ExecutiveAdministration
6	LeaseManager	LeaseManager
7	LegalAdministration	LegalAdministration
8	Attorney	Attorney
9	FinancialReviewer	FinancialReviewer

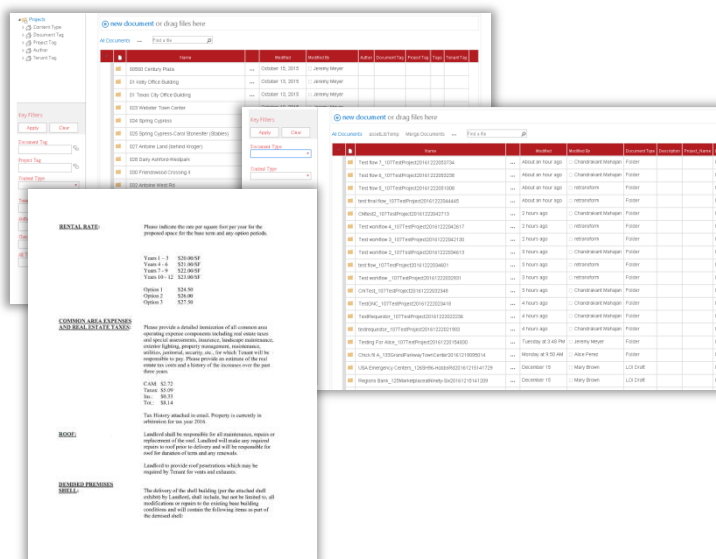


Name	Author	Modified	Status
Test Item 1	John Doe	10/15/2013	Completed
Test Item 2	Jane Smith	10/16/2013	In Progress
Test Item 3	Mike Brown	10/17/2013	On Hold
Test Item 4	Sarah Green	10/18/2013	Cancelled
Test Item 5	David Black	10/19/2013	Pending Approval
Test Item 6	Emily White	10/20/2013	Completed
Test Item 7	Robert Gray	10/21/2013	In Progress
Test Item 8	Laura Pink	10/22/2013	On Hold
Test Item 9	James Blue	10/23/2013	Cancelled
Test Item 10	Maria Yellow	10/24/2013	Pending Approval
Test Item 11	Chris Purple	10/25/2013	Completed
Test Item 12	Michelle Red	10/26/2013	In Progress
Test Item 13	Andrew Green	10/27/2013	On Hold
Test Item 14	Stephanie Blue	10/28/2013	Cancelled
Test Item 15	Jonathan Yellow	10/29/2013	Pending Approval
Test Item 16	Karen Purple	10/30/2013	Completed
Test Item 17	Steven Red	10/31/2013	In Progress
Test Item 18	Michelle Green	11/01/2013	On Hold
Test Item 19	Christopher Blue	11/02/2013	Cancelled
Test Item 20	Nicole Yellow	11/03/2013	Pending Approval
Test Item 21	Timothy Purple	11/04/2013	Completed
Test Item 22	Rebecca Red	11/05/2013	In Progress
Test Item 23	Benjamin Green	11/06/2013	On Hold
Test Item 24	Sarah Blue	11/07/2013	Cancelled
Test Item 25	Matthew Yellow	11/08/2013	Pending Approval
Test Item 26	Olivia Purple	11/09/2013	Completed
Test Item 27	Ethan Red	11/10/2013	In Progress
Test Item 28	Hannah Green	11/11/2013	On Hold
Test Item 29	Alexander Blue	11/12/2013	Cancelled
Test Item 30	Isabella Yellow	11/13/2013	Pending Approval
Test Item 31	William Purple	11/14/2013	Completed
Test Item 32	Mia Red	11/15/2013	In Progress
Test Item 33	Lucas Green	11/16/2013	On Hold
Test Item 34	Zoe Blue	11/17/2013	Cancelled
Test Item 35	James Yellow	11/18/2013	Pending Approval
Test Item 36	Chloe Purple	11/19/2013	Completed
Test Item 37	Benjamin Red	11/20/2013	In Progress
Test Item 38	Sophia Green	11/21/2013	On Hold
Test Item 39	Isaac Blue	11/22/2013	Cancelled
Test Item 40	Ava Yellow	11/23/2013	Pending Approval
Test Item 41	Michael Purple	11/24/2013	Completed
Test Item 42	Mia Red	11/25/2013	In Progress
Test Item 43	Lucas Green	11/26/2013	On Hold
Test Item 44	Zoe Blue	11/27/2013	Cancelled
Test Item 45	James Yellow	11/28/2013	Pending Approval
Test Item 46	Chloe Purple	11/29/2013	Completed
Test Item 47	Benjamin Red	11/30/2013	In Progress
Test Item 48	Sophia Green	12/01/2013	On Hold
Test Item 49	Isaac Blue	12/02/2013	Cancelled
Test Item 50	Ava Yellow	12/03/2013	Pending Approval
Test Item 51	Michael Purple	12/04/2013	Completed
Test Item 52	Mia Red	12/05/2013	In Progress
Test Item 53	Lucas Green	12/06/2013	On Hold
Test Item 54	Zoe Blue	12/07/2013	Cancelled
Test Item 55	James Yellow	12/08/2013	Pending Approval
Test Item 56	Chloe Purple	12/09/2013	Completed
Test Item 57	Benjamin Red	12/10/2013	In Progress
Test Item 58	Sophia Green	12/11/2013	On Hold
Test Item 59	Isaac Blue	12/12/2013	Cancelled
Test Item 60	Ava Yellow	12/13/2013	Pending Approval
Test Item 61	Michael Purple	12/14/2013	Completed
Test Item 62	Mia Red	12/15/2013	In Progress
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Test Item 65	James Yellow	12/18/2013	Pending Approval
Test Item 66	Chloe Purple	12/19/2013	Completed
Test Item 67	Benjamin Red	12/20/2013	In Progress
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Test Item 69	Isaac Blue	12/22/2013	Cancelled
Test Item 70	Ava Yellow	12/23/2013	Pending Approval
Test Item 71	Michael Purple	12/24/2013	Completed
Test Item 72	Mia Red	12/25/2013	In Progress
Test Item 73	Lucas Green	12/26/2013	On Hold
Test Item 74	Zoe Blue	12/27/2013	Cancelled
Test Item 75	James Yellow	12/28/2013	Pending Approval
Test Item 76	Chloe Purple	12/29/2013	Completed
Test Item 77	Benjamin Red	12/30/2013	In Progress
Test Item 78	Sophia Green	12/31/2013	On Hold
Test Item 79	Isaac Blue	1/01/2014	Cancelled
Test Item 80	Ava Yellow	1/02/2014	Pending Approval
Test Item 81	Michael Purple	1/03/2014	Completed
Test Item 82	Mia Red	1/04/2014	In Progress
Test Item 83	Lucas Green	1/05/2014	On Hold
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Test Item 85	James Yellow	1/07/2014	Pending Approval
Test Item 86	Chloe Purple	1/08/2014	Completed
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Test Item 100	Ava Yellow	1/22/2014	Pending Approval

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 documents. 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.



The screenshot shows a SharePoint document library with a list of documents. A preview window is open for a document titled "RENTAL RATE". The preview content includes:

RENTAL RATE: Please indicate this rate per square foot per year for the proposed space for the lease over any day period.

Years 1 - 3 \$20.00/SF
 Years 4 - 6 \$22.00/SF
 Years 7 - 9 \$22.00/SF
 Years 10 - 15 \$22.00/SF

Option 1 \$24.00
 Option 2 \$26.00
 Option 3 \$27.50

COMMON AREA EXPENSES AND RECOVERABLES: Please provide a detailed breakdown of all common area operating expenses including but not limited to janitorial, security, maintenance, landscaping, insurance, utilities, parking, security, etc. The amount listed will be responsible to pay. Please provide an estimate of the total common area and history of the business over the past three years.

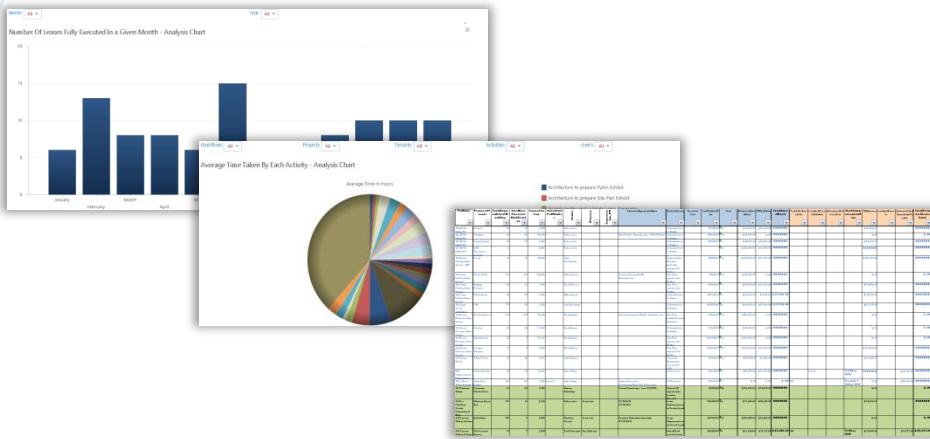
CAM: \$3.75
 Jan: \$0.15
 Sec: \$0.15
 Util: \$0.14

HOOR: Landlord shall be responsible for all maintenance, repairs and structural improvements. Tenant shall be responsible for all non-structural improvements, alterations, modifications, additions, partitions, security, etc. The amount listed will be responsible to pay. Please provide an estimate of the total common area and history of the business over the past three years.

REQUIRED FINANCIALS: The delivery of the shell building lease the attached shall contain the following information: all financials or reports for the existing lease building conditions and will contain the following items as part of the attached shell:

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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