Affinity Custom

Case Study — Lease Management System

Our client is a leading supplier of property and related services in the commercial real estate market. They provide a full range of services to their clients from offices in the UK, Europe, North America and Asia Pacific.

Background

Our client provides asset management services to an investor—a leading Life and Pensions organisation. The client is responsible for managing all lease renewals, rent reviews, tenant litigation, building surveys, purchases and sales. The investor was providing regular Excel data feeds from their property management system to our client who would then annotate the investor's Excel spreadsheet each time a new extract was received—a time-consuming and laborious process. The problem was further magnified by the high activity of lease events within the fund.

The client chose Affinity Systems to build a new system because of its experience in developing solutions for the real estate market.

The Brief

The client wanted a system to support both Landlord and Tenant (L&T) activities and related management processes across a wide range of internal and external users. A major part of the system would be concerned with the updating and reporting of event status information and comments from L&T surveyors, building surveyors and lawyers.

New Approach to Developing Systems

Although the investor's data was the primary data source the client's staff and agents also originated data; lease event status and commentary was usually in advance of the investor's systems.

The new system was to be managed centrally but to be capable of being updated by authorised users remotely.

An existing implementation in MS Excel was in use, but despite several enhancements to the overall process flow, it remained a labour-intensive and error prone solution relying upon a few key individuals for its smooth-running. Additionally, each different facet of the data involved separate spreadsheets and there was little capability for the client to combine common information and leverage this to the organisation's benefit.

The Solution

A quick analysis of the client's requirements established the following key requirements:

- To reduce the business risk of acting upon incorrect data

- To combine and consolidate data from different data sources enabling users to view all relevant lease matters

- To allow users to simultaneously view and update information

It was clear that these requirements could not be met within a spreadsheet-based solution and Affinity recommended the use of a SQL Server database and Affinity's advanced approach to systems development.

Managing data imports

The key difficulty the client faced with the existing Excel based system was how to update data effectively from the investor's property management system. With the old system the client manually transcribed all their data every time a new data feed was received from the investor. Additionally, the client could not easily view any factual lease event updates made by the investor.

Our brief was to re-use the existing data feed from the investor with minimal change - which we were able to achieve. Our pre-built data management functionality enabled us to build the import function in a cost effective and speedy manner and to deliver the client's requirements in this area.

New Approach to Developing Systems

Future Proofing

We recommended the use of a prototype to establish and confirm the client's requirements. Users were used to spreadsheets which provided a great deal of *informal* flexibility.

However the data often needed to be presented in different layouts and users had to manage over 60 columns of data. They were finding that it was increasingly difficult to manage the data in the spreadsheet format.

Affinity produced a prototype based on the familiar grid layout and provided Excel-like filtering, grouping and sorting capabilities.

Additionally we provided a function for users to define their own data layouts. Each data layout remembers column sequence and visibility, groupings and filters.

Client feedback during the prototype demonstrations revealed the client was also interested in producing tenancy schedules even though the investor's data feed did not lend itself to meeting this requirement.

This flexibility allowed us to deliver this additional requirement within cost and schedule. It shows the benefits of a well-engineered data structure in catering for future needs.

The form (left) illustrates some of the features—including intelligent stacked panels, context sensitive data views, drag & drop and highlighting - all employed to allow the user access to a large number of data items with the minimum number of user mouse-clicks.

The prototype proved a complete success and the final system delivered to the users was almost identical in look and feel.

The Result

Affinity Systems was able to build and deliver the client's system in record time by utilising our existing database and our advanced approach to systems development using pre-built code.

The client is currently planning to make the new system available to the investor and its future plans include a phase two development.

Support

The client also required ongoing maintenance and support of the application and Affinity was able to provide a cost effective fixed cost maintenance plan.

Affinity's technical solutions are built using the latest Microsoft tools including .NET, SQL Server, SQL Server Reporting Services and Business Objects' Crystal Reports.

Our database is pre-defined and capable of holding a variety of property-related data, images and binary objects. Its pre-built functions act on the mandatory data fields that preserve and enforce the integrity of the data. We also have pre-built program code that enables us to flex this structure and to define and change validation and processing rules to meet the needs of the custom build.

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