



# ATRIUMproperty

## Estates Management

Portfolio Inventory

**Estates Management**

Asset Assessment

Work Delivery

Occupancy Management

Planning & Performance



## What is Estates Management?

Estates Management is one of five Business Areas that comprises ATRIUMproperty. It enables users to define the functional structure and legal detail of the portfolio and provides comprehensive terrier facilities, including acquisitions, disposals, asset valuations, insurance valuations, rating valuations and all types of agreements. In addition, all of this data is managed through a series of easy to use and configurable Data Wizards.

When Estates Management is combined with Portfolio Inventory it allows the functional, legal and physical aspects of the property and asset portfolio to become fully integrated, enabling users to define inter-relationships fully and ensure properties in joint ownership or shared use are managed more effectively. There are four modules:

- **Functional Structure**
- **Acquisitions & Disposals**
- **Valuations**
- **Agreements**

## What does it do?

**Functional Structure** – augments the physical structure from Portfolio Inventory with definitions of how properties are being functionally used and by what parties.

**Acquisitions & Disposals** – manages the processes associated with the acquisition and disposal of any leasehold and freehold properties and assets.

**Agreements** – supports the management of leases, licences and other agreements, whether lessor or lessee, and includes details of conditions, obligations, contacts, agreement activities (eg rent reviews), service charges, etc.

**Valuations** – enables asset, insurance and rating valuations to be held for properties, including a breakdown by building, land or BLP, and support for different calculation methods.

**ATRIUMproperty** – the total property and asset management solution  
Designed to meet all the strategic, management and operational requirements  
of today's corporate property and asset managers

**ATRIUM**  
SOFTWARE

PROGRESSIVE - PROFITABLE - SUSTAINABLE -  
PROFESSIONAL - APPROACHABLE - INTEGRITY



**‘Combining who is responsible for a property or asset with where and what it is - and then linking this with contracts and orders - has helped us manage our sometimes complex portfolio more effectively than ever before.’**

Kay Banghard, Mouchel Parkman, Bedfordshire CC

### **Why choose Estates Management?**

Estates Management helps give the user an holistic view of the entire property and asset portfolio. By combining Terrier functionality with Portfolio Inventory, it integrates the physical, functional and legal definitions of the property and asset portfolio into a single system.

**Functional Structure** – augments the physical Portfolio Inventory with definitions of the functional and legal aspects of the property and asset portfolio and the relationships between them.

The module allows potentially complex relationships to be defined where there is shared ownership or usage and subsequently viewed in an easy to use graphical manner.

**Acquisitions & Disposals** – is part of Estates Management’s comprehensive terrier functionality. It manages the processes associated with the acquisition and disposal of all properties.

Like all other parts of Estates Management, this complex process is made easier by utilising the fully integrated and configurable data wizards that come as a standard part of the software.

**Agreements** – supports the management of all types of both formal and informal agreements. This includes leases, licenses and profits between a lessor or lessee; details of all contacts and interested parties; and other relevant information such as conditions, obligations, mortgages, service charges, rent reviews, breaks, etc.

**Valuations** – enables asset and valuations and to be held for properties, including breakdown by building, land and basic land and property unit (BLPU) as necessary and includes support for different calculation methods. It also allows rating valuations and related data to be recorded.

## **ATRIUMproperty - the total property and asset management solution**

**Portfolio Inventory** – physical structure of properties & assets, system registers and administration

**Estates Management** – functional and legal asset structure, acquisitions & disposals, agreements and valuations

**Asset Assessment** – condition, suitability, sufficiency, usage modelling, DDA, asbestos, fire, H&S, legionella, etc

**Work Delivery** – reactive maintenance, planned maintenance, projects and contractor/supplier management

**Occupancy Management** – tenancy accounting, request management, arrears, voids, costs in use, sustainability

**Planning & Performance** – resource management, whole life costing, scenario planning, performance indicators

**Additional system-wide features** – GIS & CAD integration, web portals & dashboards, mobile & remote working, standard & ad-hoc reporting, document management, MS office integration, notifications (email and SMS)

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