



# ATRIUMproperty Portfolio Inventory

Portfolio Inventory

Estates Management

Asset Assessment

Work Delivery

Occupancy Management

Planning & Performance



## What is Portfolio Inventory?

Portfolio Inventory is the core of ATRIUMproperty. It forms the foundation on which all the other Business Areas, the modules within them and the many system-wide additional features, are built. As such, it is a basic requirement of any ATRIUMproperty system. When Portfolio Inventory is linked with Estates Management, it enables the physical definition of the estate to be viewed from a functional and legal perspective, so properties in joint ownership and/or shared use can be managed more effectively.

Portfolio Inventory covers the definition of the physical structure of the property and asset portfolio, plus system admin, including registers, system security and housekeeping, in two modules:

- Physical Asset Structure
- System Administration

## What does it do?

**Physical Asset Structure** – stores and maintains all of the data regarding the physical structure of the organisation's property and asset portfolio, including the overall hierarchical structure of the portfolio, eg Regions, Sites, Land, Buildings & Structures, Rooms, Assets and Equipment, etc. As the key component of any ATRIUMproperty system, it also enables data from other modules to be viewed and accessed from one central point.

**System Administration** – manages the core registers, archiving, day to day housekeeping, system security, user maintenance and other system administration functions, including the maintenance of the many lists of reference data and pick-lists used throughout the system.

**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



**‘Sandwell Metropolitan Borough Council has been using ATRIUMproperty to manage assets for nine years and, quite frankly, we would be lost without it.’**

Graham Johnson, Property Asset Group Manager, Sandwell MBC

### Why choose Portfolio Inventory?

Portfolio Inventory defines the physical structure of the property and asset portfolio. It is the core of ATRIUMproperty and the foundation on which all other modules are built.

**Physical Asset Structure** – enables the physical structure of the entire property and asset portfolio to be defined in a detailed hierarchical view. It also holds contact details, links to GIS and CAD, images and photographs, preferred contractors, responsible staff and special circumstances (eg listed building status, access issues, user warnings).

The physical structure can be customised for each client but is typically defined in terms of Regions, Sites, Land, Buildings & Structures, Rooms, Assets, etc. The system provides unlimited levels and complexity giving clients a level of detail that can be easily modified over time. This flexible approach ensures a clear, concise and accurate description of all physical aspects of the portfolio. In addition, it provides a solid foundation on which the other modules can be built. It enables users

to manage complex properties and assets and easily query and drill down to the data held within all other system modules.

**System Administration** – these facilities manage the configuration and maintenance of reference data, archiving, security roles and privileges, users, general housekeeping and other system administration functions.

Reference data registers include contractor/supplier details, staff details, external companies, asset component and equipment types, schedules of rates, budget data including allocations and all other reference data types.

Flexi-field setup, alerts & notifications, report links and security are also covered. Security facilities include both system privileges and data segregation, and users, groups and roles are controlled via an easy to use front end.

## 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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