

【Application Notes】

Project Tracking System for a Property Management Company

Problem and Solution

■ Current operation

A property management firm has a contract with a major insurance company for the operation and maintenance of the insurance company's buildings in 250 locations. Project estimates—which include person responsible, tasks, milestones, and start-stop dates—are created as Excel spreadsheets and then stored in a shared folder for the responsible project managers.

■ Problem

The project estimate sheet is in a shared folder, creating a problem whereby if one user is updating the sheet, others cannot access it until the current user releases it. This critically delays data input and decreases productivity overall. Since it is also difficult to manually track the progress of individual projects using this process, estimates are sometimes submitted late to the client, resulting in lost opportunity or dissatisfied customers.

■ Solution

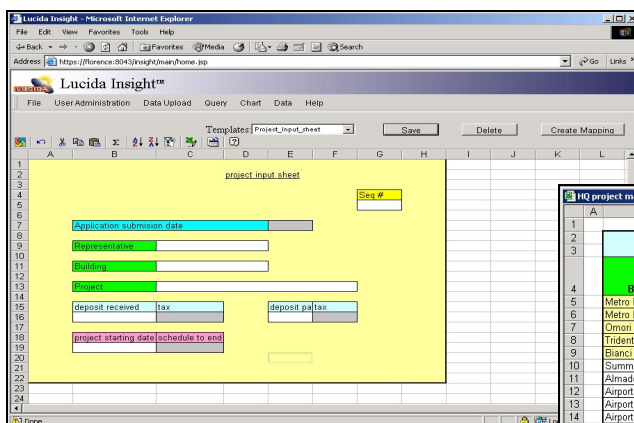
Lucida Insight™ automatically sends an estimate sheet to the responsible person via the Web. This sheet is then available for data browsing and data upload. The responsible staff can then freely access and update the project data. Also, each staff person who must provide input to the estimate is automatically notified (email) when it is his or her turn to contribute.

■ Result

All project data is stored in a Lucida Insight™ database, where it can be accessed anywhere at anytime by contributing staff. Project managers can also build in automatic alert notifications to keep the projects on track. Deploying this Lucida Insight™ project tracking system has dramatically increased productivity, estimate accuracy, as well as staff and customer satisfaction.

Sample spreadsheet

- Project input sheet (responsible staff use)



- HQ project management sheet

	Building	Project	Start Date	End Date	Appl. Submit Date	Status	Submit Complete	Project Complete	Report Submit
5	Metro Plaza I	Parking lot upgrade	15-5-03	01-7-03	24-4-03				
6	Metro Plaza II	Elevator maintenance	29-4-03	15-6-03	07-4-03				
7	Oman West	6th floor reconfigure	01-5-03	30-6-03	10-4-03				
8	Trident Bldg	Security camera installation	01-6-03	25-6-03	11-5-03				
9	Bianchi Bldg	Parking lot resurfacing	01-5-03	01-6-03	10-4-03				
10	Summit-Penn	Carpet replacement (2E)	19-4-03	21-4-03	29-3-03				
11	Almaden Ventures	Escalator maintenance	05-4-03	07-4-03	15-4-03		03-4-03	21-4-03	21-5-03
12	Airport Plaza I	AC thermostat upgrade	12-4-03	14-4-03	22-4-03		03-4-03	14-4-03	14-5-03
13	Airport Plaza II	Security upgrade	02-5-03	04-5-03	11-5-03		03-4-03	04-5-03	03-6-03
14	Airport Plaza III	Security upgrade	28-5-03	30-5-03	07-5-03	●	03-4-03	30-5-03	29-6-03
15	Sunu Square	New tenant prep (9th floor)	05-4-03	07-4-03	15-3-03		03-4-03	07-4-03	07-5-03
16	Prof. Campus	Elevator-sched Maint	05-4-03	07-4-03	15-3-03		03-4-03	07-4-03	07-5-03
17	Alioto	Carpet cleaning (S.129)	11-5-03	13-6-03	21-6-03		03-4-03	13-6-03	13-7-03
18	Prudential Bldg	Parking lot upgrade	05-4-03	07-4-03	15-3-03		03-4-03	07-4-03	07-5-03
19	Daimon Bldg	Office reconfigure (S.400)	05-4-03	07-4-03	15-3-03		03-4-03	07-4-03	07-5-03
20	Central Park Plaza	Escalator maintenance	28-5-03	30-5-03	07-5-03	●	03-4-03	30-5-03	29-6-03
21	Smith-Kesson Bldg	AC thermostat upgrade	05-4-03	07-4-03	15-3-03		03-4-03	07-4-03	07-5-03
22	Silicon Ventures	Security upgrade	12-7-03	15-7-03	21-6-03		03-4-03	14-7-03	14-8-03
23	Northgate	New tenant prep (suite 250)	05-4-03	07-4-03	15-3-03		03-4-03	07-4-03	07-5-03
24	Gateway Plaza	Elevator-sched Maint	21-4-03	23-4-03	31-3-03		03-4-03	23-4-03	23-5-03
25	American Title	Carpet cleaning (S.129)	05-4-03	07-4-03	15-3-03		03-4-03	07-4-03	07-5-03
26	TransAmerican	Parking lot upgrade	05-4-03	07-4-03	15-3-03		03-4-03	07-4-03	07-5-03
27	PanAmerican	Office reconfigure (S.450)	28-5-03	30-5-03	07-5-03	●	03-4-03	30-5-03	29-6-03
28	Flatiron	Carpet replacement	05-4-03	07-4-03	15-3-03		03-4-03	07-4-03	07-5-03
29	Southgate	Office reconfigure (S.1200)	21-5-03	23-5-03	30-5-03		03-4-03	23-5-03	22-6-03
30	Prudential Bldg	New tenant prep. (4th Floor)	14-5-03	16-5-03	23-4-03		03-4-03	16-5-03	16-6-03