

CASE STUDY

The City of San Diego Simplifies and Optimizes Real Estate Lease Administration with REportfolio™

With REportfolio lease administration software, the City of San Diego got a simple solution for managing a complex real estate portfolio. The centralized system and custom dashboards allow property agents to easily find, sort, and report on all property-related information while tailored workflows maximize efficiency and ease of use.

REportfolio by the numbers



120,000
acres



1,600+
sites



700+
active agreements



500+
active jobs



38
users

THE CLIENT

The City of San Diego is dedicated to helping foster the region's economic base to improve the quality of life for its citizens and business community. San Diego is known worldwide as one of the best tourist destinations and a location for cutting-edge businesses.

THE INITIAL CHALLENGE

The City of San Diego has a diverse real estate portfolio, featuring more than 1,500 properties that range in size from large tracts of open space to tiny remnant parcels.

The City's portfolio includes all the facilities necessary to provide the basic functions of government in addition to a significant number of properties leased to third parties that generate income and/or provide community-based services.

In 2006, San Diego's Real Estate Assets Department was looking for a system to track all of the City's occupied space. After a software search, they selected a single license of REportfolio to maintain this information.

Shortly afterwards, an emerging need to track occupied space as well as leases caused the City to begin the process of retiring their city-wide mainframe with the intent of migrating to SAP.

The City's Real Estate Assets Department needed a system that could interface with SAP while enabling their property agents and support staff to easily and economically manage all of the City's leased and owned property.

THE WIZARD SOLUTION

REportfolio replaced the functionality of the City's mainframe while providing additional capabilities on a user-friendly platform that seamlessly integrates with SAP. The City's implementation of REportfolio started with a single seat on a single machine and grew into an expansive system that the entire Real Estate Assets Department can use readily.

Centralized database provides information at a glance

The City's property agents have a lot to keep track of. REportfolio gives them the precise and accurate visibility they need to manage multiple lease and financial obligations.

The agents can find, sort, track, and report on all property-related information, permits, leases, and agreements in one place while gaining insight into a complex billing and revenue structure.

Flexible interfaces and integrations improve efficiency and ease-of-use

With REportfolio's flexible interfaces, we were able to replicate the format of the City's mainframe system. We imported data, maintained site codes and mimicked screens from the old system, making it a simple transition for users.

REportfolio connects to the City's other software solutions, integrating with SAP's accounts receivable information and DocuLynx document management to streamline the reconciliation process.

Customized jobs dashboard makes it easier to manage accounts

The City has many property agents that need access to lease information. The old mainframe system worked well but was not easy to use, making it difficult for property agents to look up information on their own without the help of support staff.

In the old system, lease project information was updated manually once per month. With REportfolio, property agents have access to real-time information at any time and from anywhere. They can log-in directly to look up leases, make adjustments, view outstanding invoices, run reports, add pictures, and schedule reminders.

With up to 500 jobs open at any time, REportfolio improves productivity and takes the burden off of support staff while giving agents access to more—and more accurate—information.

"Wizard cares about their customers. They continuously meet our needs, exceed our expectations, and turn our ideas into better ideas. Although we were looking for a replacement system, what we got was a better way of managing our real estate portfolio. Wizard delivers what they promise and more."

— Supervising Management Analyst, City of San Diego, Real Estate Assets

Wizard Software delivers solutions that are simple to use, with powerful feature sets, yet flexible enough to be tailored to the specific needs of capital project managers, facility managers, and lease administrators.

Our solutions are unique because our clients are. For over 25 years, Fortune 1000 corporations and major healthcare systems, universities, and state and local governments have trusted us to deliver software solutions that align with the way they work.

