



ESTATE MANAGEMENT SOFTWARE & SUPPORTING SERVICES

SERVICE DEFINITIONS FOR G-CLOUD 15

CONTENTS

Our Software	2
Feature and Benefits	2
Our Experience and History	3
ESTATE Suite Software Modules	3
Software Details	4
ESTATE Manager	4
ESTATE Terrier	5
MAINTENANCE Manager.....	6
RISK Manager	7
FM Portal	8
CONTRACTORS Portal.....	9
ENGINEERS Portal.....	10
Commercial Overview	11
Implementation.....	11
Bulk Licence Discounts	11
Module Pricing	12
Portal Pricing	13
Purchase and Setup Fees Include.....	13
Annual Support.....	14
Standard Day Rates	14
Standard Terms & Conditions	14
Contact Us	15

OUR SOFTWARE

ESTATE Suite from 3i Studio is a secure, web-based estate management system, designed to be quick to set-up and easy to use. Highly configurable and modular in nature the system can be adapted to your requirements, and all the modules have easy screen layouts and summary information in a standard format throughout. These solutions have been developed by working closely with estates professionals to solve the problems associated with large and small estates alike, covering both day to day and wider strategic planning and analysis.

The range of modules from the ESTATE Suite system cover all the major functionality you will require to run an efficient and reliable estates service. These include estates asset management, planned and reactive maintenance, helpdesk, risk management, leasing and buying property, environmental and asbestos, and property appraisal.

Feature and Benefits

- Your Information On The Go – With web access to all your information and documentation through our secure interface you can securely access your data anywhere with one simple login.
- Modular System – Secure, web based modular approach, with a single interface and unified database for all your modules and data.
- Highly Configurable – Although the system comes with an ‘out of the box set-up’ almost all screens can be configured to suit your working practices, or specific tasks.
- Hosting Included – Our system costs include secure hosting on servers managed by us, which enables faster set-up and support, and leaves you more time to run your system.
- Upgrades – All supported systems are regularly updated free of charge to include new functionality as it becomes available. With the option for both test and training environments, you can test any upgrades before they are applied.
- Supporting You – With our partnership approach you will have a dedicated account manager and access to our knowledgeable support team, should you ever need them.
- Easy Data Exporting – Along with the ability to output almost all data to excel, we can also offer services for integrating data with third party software.
- Confidentiality, Availability, Reliability – Our servers are designed to be as reliable as possible with more than 99% up-time, accessible from anywhere, and with highly secure architecture, you can be sure your system will be available when you need it.

Our Experience and History

Established in 1992 and incorporated in 1996 3i Studio was set up to create software to meet the needs of estates management professionals. Our knowledgeable staff work closely with our clients to make sure that our software is constantly evolving to meet the ever-changing needs within the estates management sector.

3i Studio have been working primarily with Government Sector organisations for over 25 years to produce and maintain estate asset management data used to streamline the day to day running of their estates and enabling better strategic decisions to be made.

Our software and support are used across the UK including Scotland, Northern Ireland, Wales, and the Republic of Ireland, and we pride ourselves on our long-standing relationships, and high-quality service.

ESTATE Suite Software Modules

ESTATE Manager	Our key asset management module allows you to manage space, occupancy, appraisal, asbestos, and costs. It also has integrated GIS Features and Register of Compliance Certification.
ESTATE Terrier	Store and manage leases and licenses, acquisitions and disposals, easements and covenants, rent payments, and valuations.
MAINTENANCE Manager	Reactive faults helpdesk, planned preventive maintenance, and scheduled testing.
RISK Manager	Template driven fully configurable risk assessment module with fire incident reporting.
FM Portal	Publish key estates information securely to a wider audience, including remote fault logging and tracking.
CONTRACTORS Portal	Contractor access to assigned works with sign-off / cost logging.
ENGINEERS Portal	Engineers remote working for both pre-planned and reactive maintenance tasks.

SOFTWARE DETAILS

ESTATE Manager

ESTATE Suite's core, ESTATE Manager is a feature rich high-quality property asset management system that gives you the tools you need to efficiently manage your property asset portfolio.

- Geographical Information System – Giving you a graphical overview of the entire estate, easily identifies buildings with key information such as asbestos risk, building condition, and building use.
- In-depth Property Information – Store all the information about your sites and buildings in a centralised repository, allowing quick overviews of the whole estate.
- Store Detailed Space Occupancy Information – Allowing you to keep track of which department is occupying which space, the area of each space, the heated volume of each room and overall usage figures, helping you to monitor and make quick and easy decisions on space.
- Track Running Costs – Enables you to keep abreast of building efficiency, compare current and historic costs, and analyse performance of buildings across your estate, making it easier to report and justify costs.
- Stock Condition Appraisal with Backlog and Budget Costs – Giving you an overview of the stock condition, storing current and completed information and group work into schemes for completion so managing ongoing maintenance projects is easier and more efficient.
- Estate Wide Reporting – A wide range of reporting options are available within the software, giving you just one place to access all the information and analysis you might be asked for.
- Maintain Accurate Budgetary Control Using 'Live' Condition Data – Take advantage of our unique process methodology for maintaining stock condition data 'live' rather than simply historic; allowing you to maintain accurate budgetary control.
- Compliance Certificate Register – View and track all your key compliance dates and documents in a single easy to read interface, with intuitive colour coding that shows all you need to know in one place.

ESTATE Terrier

Designed for the in-depth management of legal property information, ESTATE Terrier is a key element within ESTATE Suite giving you the ability to store, track and manage legal information, documentation and task reminders.

- Fast and Easy Access to ALL Lease Information – Allowing you to monitor, view and retrieve all information on leases and licences at the drop of a hat!
- Instant Reporting for Faster Decision Making – You can pull up progress reports at any stage in the lease, sale or purchase for the latest information, helping you to make informed decisions.
- Better Record Keeping – ESTATE Terrier provides space for you to store and access quickly and easily all information relation to leases, purchases and sales on a building-by-building basis. Holding all this information in one place makes it easier to pull up the relevant information at any given time.
- Up-to-date Information at Your Fingertips – ESTATE Terrier stores full historic details of all payments made with dates and balances, along with an overview of current balance so you always know what is going on and can head off issues before they arise.
- Never Miss a Key Date Again – Track key dates for leases, licenses, purchases and rental data all on one screen so they never sneak up on you again.
- Easily Manage Individual Covenants and Easements – ESTATE Terrier handles the details of all your site/building related easements and restrictions.
- Instant Access to Photographs, Plans or Documents – with ESTATE Suite the system wide graphics component provides you with the ability to access any stored documents, even allowing you to include building photographs in the reports you run.
- Current and Historic Property Valuation Data – with the ESTATE Suite system you can store and access any type of property valuation providing you with useful current and historic data.

MAINTENANCE Manager

Managing fault reporting, work requests and planned maintenance can be among the most complex of tasks - 3i Studio's Maintenance Management solution manages this simply and efficiently.

- Fault Reporting and Tracking from any Location – the web or intranet-based helpdesk means anyone, (tenant, building user or estate team), can report and track the status of faults without needing full access to the systems. This will reduce the time you spend communicating updates to those who reported the issue; they can simply go online and check it themselves.
- Generate and Track Purchase Orders – the integrated purchase order tools will link to various finance systems, so you can keep track of your maintenance costs in one place. This can also help you budget both planned maintenance and suspected further maintenance each year.
- Monitor Efficiency – monitor tasks to check they have been completed within required timescales. By showing you data for both staff and contractors, you can make better decisions when assigning tasks.
- Avoid Costly Breakdowns by Scheduling Regular Tasks – whether they are daily, weekly, monthly or yearly, you can schedule your maintenance tasks within the module for the required frequency. By developing a comprehensive maintenance schedule, you can keep on top of all maintenance tasks and avoid breakdowns and costly urgent repairs.
- List and Monitor Standard Plant and Equipment – set up items in the system so you can begin scheduling PPM and create assets, enabling you to quickly set up future time and cost saving features.
- Audit and Accountability – all the information you need to satisfy audit requirements is easily available for reporting. Reports and dashboard charts for audit and performance monitoring come as standard, whilst you can also produce your own custom reports.
- Scheduled Testing – With question based scheduled tests assets can be tested to ensure they continue to meet required criteria; with customisable templates you can test just about anything with this system and track regular test requirements.

RISK Manager

RISK Manager is full of features and benefits to make managing Fire and Health and Safety easier and less time consuming.

- Definable Assessment Forms – choose from standard templates or design your own; either way you can be sure that you are prompted with everything you need to make the assessment.
- Create and Schedule Tasks – whether something is spotted during a risk assessment or a survey, you can easily create, schedule and monitor tasks for remedial action.
- Key Dates Reminders – view all scheduled tasks in a single concise view so you can see where you are up to at a single glance.
- Register of Fire Drawings – you can have easy access to stored links to all fire and equipment drawings.
- Fire Equipment Register – build and store a comprehensive register of all your fire equipment.
- NHS Fire Incident Reporting Kit – allowing NHS trusts to store all details for ‘actual’ and ‘unwanted’ fire signals so you are compliant with the NHS FPN11 guidance.
- Fully adjustable to work with your Risk Matrices – you define the types of answers to questions.
- Stock Condition Appraisals – using the ESTATES Stock Condition component you can incorporate building fabric costings and works programming into your stock condition appraisals.
- Estates Website – with the optional FM Portal you can quickly and easily set up your own secure estates’ website, where you determine who has access to what information.
- Scheduled Testing – With question based scheduled tests assets can be tested to ensure they continue to meet required criteria. With customisable templates you can test just about anything with this system and track regular test requirements.

FM Portal

FM Portal is full of features and benefits to help you share information easily and securely with key managers, stakeholders, engineers and contractors.

Acting as the interface between the estates team and others in your organisation and beyond, FM Portal allows you to publish information to a wider audience and collect reports on faults.

- Publish Data Simply - you can easily publish ALL the data your estates and facilities departments need to share, whether they are internal or external clients, engineers or contractors.
- Integrated Mapping – view key data in map view (underlays include Google, Bing and Ordnance Survey).
- Share Live Data – you can share up-to-date information and reports, with live updating.
- Easy to Use – you will find FM Portal a straightforward, easy to use system which requires minimal training.
- Low Maintenance Costs – FM Portal requires no web programming or support from your IT department to operate.
- Multi-layered Security – individual users or groups can access specific pages or the whole site; you decide who has access to what.
- Live Helpdesk – allow your ‘clients’ to log and track work requests via the easy-to-use helpdesk.
- Direct File Uploads – you can easily create customised pages for the upload of your latest photographs, CAD drawings and permits to work.

CONTRACTORS Portal

Engage directly with your contractors without the need to send masses of emails. Communicate directly through the contractor's portal and assign works to your contractors. With comprehensive notes and the ability for the contractor to add photographs you can see exactly what is happening at every stage of works.

- Single Task Interface – Giving your contractors access to a single standard interface where they can see all the tasks assigned to them for both reactive helpdesk & pre planned maintenance works.
- Direct Work Assignments – No requirement for multiple emails or paperwork to be sent to contacts.
- Faster Sign-Off – With contractors updating information live you no longer have to wait for emails or paperwork to be returned before you can review & sign-off works.
- Performance Monitoring – with faster sign-off you can see when works are completed, and you are no longer relying on returned paperwork & contractors reports. This allows better monitoring of performance against your key performance indicators.
- Documents & Certificates – With the ability for your contractors to directly upload completion documents and certificates directly into the system, you will no longer have to scan documents to the system or store paper copies.

ENGINEERS Portal

Send and receive data to and from your engineers' mobile devices quickly and easily. Working hand in hand with MAINTENANCE Manager, the MAINTENANCE Mobile module enables you to manage your maintenance projects effectively.

- Time Saving – by sending the work assignments directly to your engineers they no longer need to return to the office to collect works instructions.
- Real Time Status Updates – configurable time updates from the mobile device to your database enables you to view the current status of projects as they're updated on-site.
- Improved Relationships with Clients and Management – knowing the real time status of a job enables you to give instant and accurate responses to enquiries about projects.
- Accurate Budget Management – the live updates at regular intervals shows you when jobs are being completed and allows you to view time sheets for ongoing assignments, making it much easier to spot a project that may go over budget.
- Keep Work Progressing – engineers can request more manpower or resources through the system reducing the need for telephone calls. IT allows the estate department to view all engineers' workloads and send the necessary work requests through immediately without waiting for someone to call into the office.
- Real-Time Feedback – Engineers have the ability to add photographs and notes that can be viewed immediately by supervisors and administrators, with responses sent directly back to their mobile device, enabling them to continue working efficiently.
- Request Originators Sign-Off – Signature collection allows the request originator to sign off works, meaning you can be confident that once the work is complete there should be no come back.

COMMERCIAL OVERVIEW

3i Studio believe we offer the lowest cost of ownership CAFM system on the market, along with realistically priced training and fair-priced ongoing support fees. We achieve all this through having low overheads and by providing quality products that do exactly what they need to, which are constantly developed to provide our clients with the most up-to-date solutions.

This means that we don't have to tie clients in to costly contracts. They stay because our solutions meet their needs and help them deliver measurable improvements, and they enjoy working with our knowledgeable and professional team.

Our ESTATE Suite systems include web hosting that meets the most demanding Government security requirements and is provided free of charge to customers with support contracts. All supported systems are regularly updated free of charge to include new functionality as it becomes available. With the option for both test and training environments, you can test any upgrades before they are applied.

In addition to these benefits, 3i Studio have taken great care to design our software for the most efficient administration and management and have produced extensive data collection toolkits to ensure that data importation costs are kept to a minimum.

Implementation

Here at 3i Studio we understand that each project is different, and each set-up should be tailored to your individual needs. As such we do not have a fixed implementation cost as each project is assessed in its own right, with costs quoted at our day rates according to your system set up, training and data upload requirements.

Ordering from 3i Studio couldn't be simpler. Contact us to discuss your requirements, and we will confirm / recommend the modules and number of concurrent licences you need, along with any relevant set-up time or training.

Bulk Licence Discounts

Where multiple licences are purchased, discounts are available on the licences purchased, starting at 5 licences with a 10% discount applied and a further 5% discount is applied for each additional 5 licences purchased up to a maximum of 25% discount on the purchase cost.

Module Pricing

3i Studio's module licences are concurrent, so you don't need a license per user. This means you can have multiple people trained and using your system, with the number of licences specifying how many can log in at the same time. **A team of 50 users will typically only need 10 concurrent licences.** This provides significant cost savings without losing any functionality.

MODULE	KEY FEATURES	PURCHASE & SETUP FEE (One-Off Cost)	ANNUAL SUPPORT Per licence
ESTATE MANAGER	This key Asset Management Module stores and manages your in-depth property assets information and documentation centrally. Access live asset documentation, manage space and occupancy, appraisal, asbestos, and costs. Also includes an integrated GIS Feature and Register of Compliance Certification	£1,895	£695
ESTATE TERRIER	For storing and managing Leases & Licenses, Acquisitions & Disposals, Easements & Covenants, Rent Payments, and Valuations	£1,495	£535
MAINTENANCE MANAGER	Reactive Faults Helpdesk & Planned Preventive Maintenance, and Scheduled Testing	£1,895	£695
RISK MANAGER	Template driven fully configurable risk assessment module with fire incident reporting and training records	£1,895	£695
EASYLINK	Connect ESTATE Manager information with AutoCAD Drawings	£995	£315

Portal Pricing

Providing secure access across your whole organisation, Contractors and Engineers.

MODULE	KEY FEATURES	PURCHASE & SETUP FEE (One-Off Cost)	NUMBER OF USER LICENCES	ANNUAL SUPPORT
FM PORTAL	Publish key estates information securely to a wider audience, allow remote fault logging and tracking	£2,475	NA	£1,475
CONTRACTOR / ENGINEERS PORTALS	Secure remote access for your Contractors and Engineers to assigned PPM and Reactive Maintenance Tasks	NA	First 5 users then 6 to 10 users 10+ users	£340 each £170 each £2,550 fee*

*The annual support fee for the Contractor and Engineers Portals is capped at 10 user licences - if you have 11 or more users, across either portal, you only pay a £2,475 fee.

Purchase and Setup Fees Include

- System setup and configuration
 - User account creation Including both v10 system access
 - FM Portal access for fault logging and information viewing
 - Engineer / Contractor portal access
- Account Management
- Base data creation / import to cover:
 - Creation of site and building information
 - Import of floor and room information if provided
 - Import of asset lists if provided
 - Setup of helpdesk coding / lookup lists
 - Creation of custom works ticket
- Training as needed – We offer training as workshop style sessions, normally delivered via MS teams, but can arrange on site training at your request. (Please be aware that on-site training will incur additional charge due to travel expenses etc.)

Annual Support

An annual support fee is chargeable per licence for all 3i Studio's modules and portals. This provides you with a dedicated Account Manager, technical support from our expert helpdesk, and free software upgrades as they become available.

It also covers an annual Account Management meeting to review your solution and ensure it is still meeting your needs, to make sure all your modules are being fully utilised, and to identify any training requirements.

Standard Day Rates

	OUR OFFICE	YOUR SITE
PROJECT MANAGEMENT / CONSULTANCY	£765	£895
SOFTWARE DEVELOPMENT	£765	£895
SOFTWARE SUPPORT ENGINEER	£665	£795
TRAINING – UP TO 6 PEOPLE	£665	£795
DATA TECHNICIAN	£595	£725
CAD TECHNICIAN	£595	£725

Our day rates are based on a standard eight hour working day. Fixed price contracts are available for special projects. Small amounts of work will be charged at an hourly rate calculated by dividing the day rate by 8 hours, with a minimum half day charge. This applies to works carried out at 3i Studio's office, as work completed on client sites will be charged at the full day rate.

To keep pricing as simple as possible our site day rates include travelling expenses. However, should it be necessary for our consultants and or technicians to stay overnight in the local vicinity of our customers, accommodation will be charged at cost and the cost agreed with you beforehand.

Standard Terms & Conditions

Commencement of works will be agreed once a purchase order has been received for the works / software purchase, and an invoice raised at this point. Invoices for additional agreed Day work will be presented at the end of each calendar month and will be accompanied by detailed and authorised day work sheets where applicable.

All prices are subject to VAT at the current rate. Invoice Payment terms – strictly 30 days net.

CONTACT US

Call: 0345 675 5051

Email: info@3istudio.com

Address: 3i Studio Ltd
9 Thorney Leys Park
Witney
Oxfordshire
OX28 4GE