

# Success Story

## A Single Platform for All Real Estate Needs

When real estate leader Forest City Enterprises (FCE) undertook building the 52-storey New York Times headquarters, the stakes were high—literally and otherwise. The interdepartmental team of geographically dispersed construction, accounting, development personnel, partners and external vendors needed to collaborate. The collaboration needed to occur quickly and easily on the high-profile, large-scale project. Indeed, FCE sought to manage all unstructured content across the entire enterprise, encompassing dozens of concurrent projects.

FCE is a \$8B company, recently rated by Fortune magazine as the top publicly traded real estate company in the U.S. Established in 1921, FCE operates under three distinct business units—commercial, residential and land development—with a commitment to building superior, long-term value through a consistent strategic focus on projects in markets with high-growth potential.

### Intricately Woven into Business Processes

“We had several point solutions but we needed one solution that would create a central repository for all ECM needs including imaging integration with our SAP® system, lease document management, email and records management, workflows, collaboration and document storage,” says Ian Welles, Project Manager at Forest City. “We were also looking for software solution that came with significant out-of-the-box functionality so we could deliver an ECM solution to our business community in a timely manner.”

Open Text’s strong partnerships with SAP and Microsoft® were powerful drivers in the real estate giant’s decision to go with Open Text. “We’re at a point in technology where we look at strategic partners. It was time that we moved away from the one-off solutions and create a technology platform that can serve the full lifecycle of the assets that we develop and manage. As a result, we selected a few strategic partners, Open Text being one of them because their software not only manages documents, Open Text is a company that has the holistic vision of document management, workflow, records retention, and collaboration,” confirms Raj Patel, Chief Information Officer and Senior Vice President of Forest City Ratner Companies. “ECM solutions will also be instrumental in helping us meet Sarbanes-Oxley Act Section 404 compliance.”

Livelink ECM is used at Forest City in three main categories: integration with other applications, content storage and collaboration. “The combination of these areas makes it one of the widest ranging applications in our organization,” says Welles, “and one of the applications most intricately woven into our business processes.”

### A 52 Storey Building Project

The first internal customer at Forest City to roll-out an Open Text based solution was an interdepartmental team involved with the development and construction of the 52 story New York Times headquarters building. The rollout of an extranet powered by Livelink ECM with complex workflow functionality enabled efficient project collaboration for the business team which included the internal construction, accounting and development teams as well as external partners.

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**Raj Patel,**  
Chief Information Officer and Senior Vice President,  
Forest City Ratner Companies

#### Industry

Real Estate

#### Customer

Forest City Enterprises

#### Business Challenges

- Create a single platform that can support the lifecycle of assets
- Integrate with SAP and Microsoft products
- Ensure SOX Section 404 compliance
- Reduce paper heavy processes and paper storage
- Eliminate bottlenecks
- Free up Microsoft Exchange servers

#### Business Solution

Livelink ECM Enterprise Suite  
Livelink ECM – Construction Management  
Livelink ECM – Email Management  
Livelink ECM – Lease Document Management  
Livelink ECM for SAP Suite  
Livelink ECM – Vendor Invoice Management

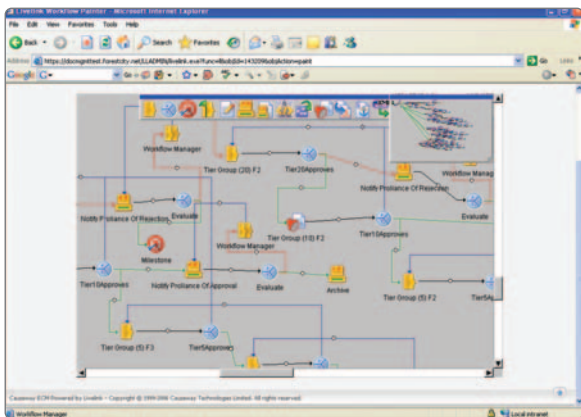
#### Business Benefits

- Improved construction collaboration
- Easy access to business critical documents
- One central repository for content
- Visibility over document approval routing
- Improved SOX Section 404 controls for better governance and risk reduction
- Streamlined email management
- Improved efficiency of business processes
- Support for composite applications, content storage and collaboration

“The ability to use Livelink ECM for our New York Times headquarters building project brings great value to Forest City. The construction team has instant access to contract documents and notification and workflow functionalities provide our staff with visibility over project status and document location. Overall, the solution greatly improved business processes,” explains Welles.

## Workflows Address Compliance

Advanced workflow functionality provides the backbone for the New York Times building project and is soon expected to extend to all construction projects undertaken by the organization. “We are leveraging the workflow engine of Livelink ECM and the document repository to build a seamless and paperless business process for our project costing system,” says Welles. “We have integrated Livelink ECM with Meridian Systems Proliance. This integration is unique to the construction industry because it creates a composite application that uses a best-of-breed approach to resolving construction budgeting and cost accounting business needs.”



The most significant benefits have been in time tracking, workflow bottlenecks, creating easy access to business-critical documents and establishing the company’s disaster recovery solution for documents. The greatest end-user benefits have been associated with having one central repository for content and document approval routing accessible both inside and outside of the organization. “Most importantly, the efficient approval workflow process eliminates bottlenecks and dramatically improves our Sarbanes Oxley Section 404 controls for better governance and risk reduction,” confirms Patel.

## Lease Document Management

As a real-estate company, Forest City needs to manage thousands of tenant lease documents. This process can become very paper heavy requiring the Leasing Department staff to spend hours manually reviewing leases page by page to find specific information.

“The ability to transfer leases into electronic format and enable search functionality is a very important aspect for us. As a real estate company, we are very paper-heavy. We have thousands of documents that we decided to move into electronic format and lease documents are definitely our priority as they drive our business,” confirms Matt Ammiller, Project Manager at Forest City.

A Livelink ECM – Lease Document Management solution has been implemented at Forest City to provide electronic storage for lease documents as well as easy search functionality. “If we need to find out what the co-tenancy clause is for a specific tenant across our entire portfolio, we will be able go into Livelink ECM, conduct the search through a user-friendly interface and then instantly retrieve the required information. This ability will greatly improve our productivity,” adds Ammiller.



## Paperless Accounts Payable processes

Accounting staff at Forest City were faced with an inefficient process of receiving paper invoices, routing them for data entry, resolving problems and reporting. In fact, most of the time spent on these processes is manual and very costly to the organization.

Their use of Livelink ECM – Accounts Payable for SAP Solutions allows the department to benefit from the strong archiving functions of Livelink ECM and seamless integration with SAP. The Open Text Vendor Invoice Management Solution also creates a paperless Accounts Payable process.

## Email Management

Proliferation of email at Forest City was causing many end user mailboxes to exceed their size limit and consequently the Microsoft Exchange servers were running out of storage space. “The primary form

of communication in the work environment is email. When the Exchange server runs out of space, everything stops - no more email communication. We needed to find a solution to consolidate, compress and archive email to simply keep the business going,” explains Charles Foley, Senior Systems Administrator at Forest City.



To optimize the Exchange environment, Livelink ECM – Email Management was deployed in four weeks. So far, the solution’s archiving processes have created almost 400 GB of space and improved email performance dramatically. “Using Livelink ECM – Email Management, we are able to free up our Exchange environment to better serve immediate communication needs while managing older email content on our SAN storage system,” says Foley. “This combination makes it a winning solution for end users in the retrieval of archived email in addition to allowing the existing SAN system to be leveraged in the management of email content.”

## Construction Management

The next step for Forest City is the deployment of Livelink ECM – Construction Management to aid in the administration of construction projects. “Collaboration has become a necessity when constructing office and residential properties,” explains Welles. “We are leveraging Livelink ECM – Construction Management for construction collaboration between internal stakeholders, external partners and vendors. With increasingly distributed teams working together on our large-scale construction projects, we’ve found this a necessity for our business.”

“Managing paper based project files was becoming increasingly difficult and because we are doubling the amount of information every year we needed a solution to manage, store and archive all information in electronic format during the project lifecycle,” says Anne Cottam, Project Manager in the Forest City Construction & Design Development Department.

The company is looking to reduce costs by eliminating printing and courier costs while increasing efficiency. “Livelink ECM – Construction Management with its notification and versioning functionalities and permissions model will enable us to drastically improve our distribution and reporting processes and take administrative tasks out of the hands of our construction team,” confirms Cottam.

Forest City is also planning on capturing corporate record books—the entity documents that govern the different properties the company owns as well as loan closing binders—financial documents created as loans are closed or sealed within certain properties. Future scope will also include additional workflows, records management and enhanced integration with Microsoft Office. It will involve up to 3,000 internal users and hundreds of external users.

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