



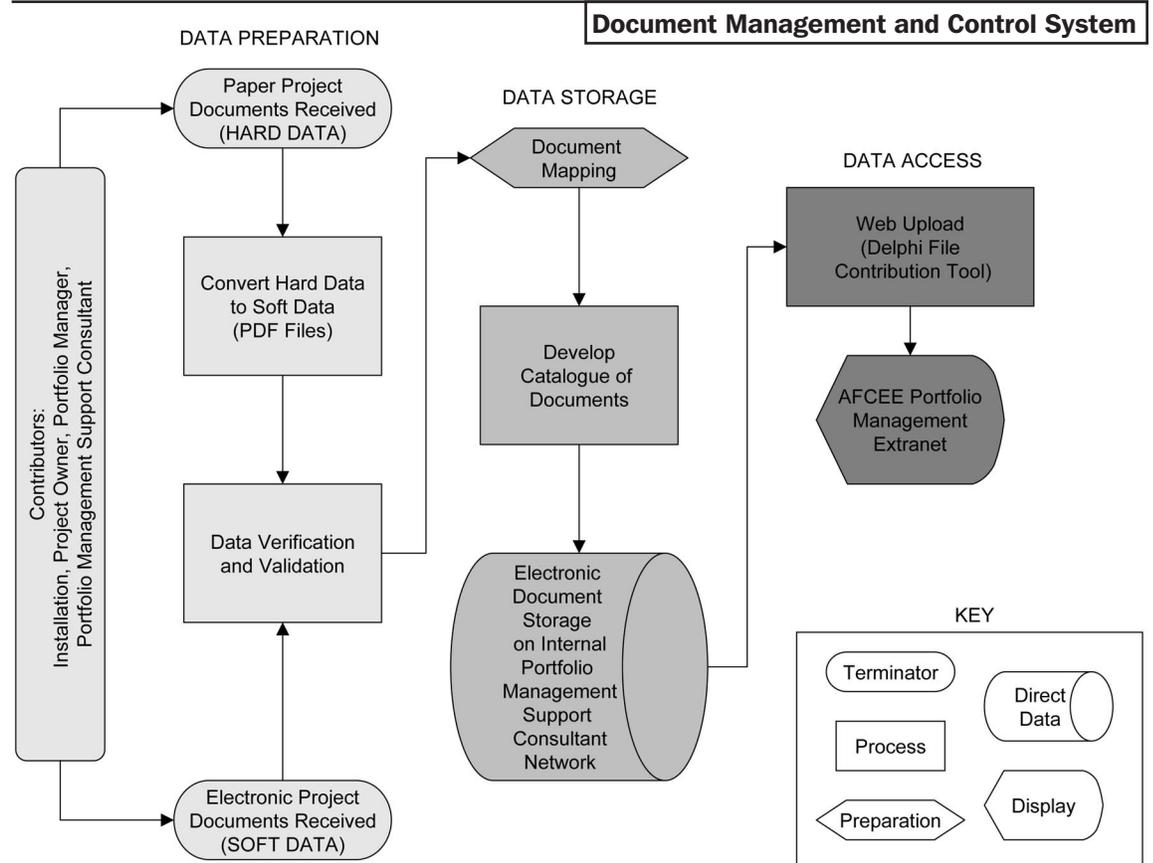
Air Force Housing Privatization Portfolio Management Document Management and Control



Portfolio Management tools generate seven general categories of documents for each installation. These categories include compliance testing, accounting and financial reporting, insurance compliance, transition documents, site visits, document management and control, and other Portfolio Management tools. Each category contains a series of subcategories, further defining the documents.

To maintain Portfolio Management documents, the Portfolio Manager* implements an effective, long-term document management and control system. A well-defined process is imperative for preparing, storing, using, and sharing the large number of diverse documents associated with a privatized project. Document management and control is required to ensure the safety of documents over the lifetime of the transaction and to reduce cost and time barriers associated with obtaining information. All stakeholders play an important role in the document management and control process. Contributors submit documents to this system in the manner prescribed by the Portfolio Manager.

The following graphic depicts the document management and control system, from document input to user access, and details the actions executed during each stage of the process.



* The Air Force Housing Privatization Portfolio Manager is the Air Force Center for Environmental Excellence, which executes duties with the assistance of Jones Lang LaSalle, the current Portfolio Management support consultant.

Document Access

Users can easily access all available Portfolio Management information online regardless of their geographic location. Users must contact the Portfolio Manager to gain access to the AFCEE Portfolio Management Extranet. The Extranet is a central, continually accessible repository for all project related documentation from transaction closing forward. The Portfolio Manager verifies that the user is authorized to access the Extranet and transmits the user's name, e-mail address, phone number, organization, and the installation(s) the user can access to the Site Administrator. The Site Administrator issues the user a login and password, allowing the user to log in to the Extranet at any time. Users are provided limited access to projects in which they are involved.

The AFCEE Portfolio Management Extranet is continually updated to ensure that all information is current. Furthermore, Web upload forms on the Extranet allow users to submit Portfolio Management data (soft data) as it is generated. The user indicates which category the document belongs to (e.g., compliance testing), and the document is reviewed and posted on the Extranet.

PORTFOLIO MANAGEMENT SERIES

This Information Sheet is one in a series on the subject of Portfolio Management. In February 2001, the Air Force Center for Environmental Excellence (AFCEE) was designated as the Air Force Housing Privatization Portfolio Manager. AFCEE executes its Portfolio Management responsibilities with the assistance of Jones Lang LaSalle (JLL), the current Portfolio Management support consultant.

From transaction closing through project closeout, the Portfolio Manager acts in oversight, monitoring, and guidance roles on behalf of the Air Force to protect the Government's interests. (Project closeout is at the conclusion of the transactional performance period, assets are disposed of and the project is closed out.)

FOR MORE INFORMATION

Air Force Center for Environmental Excellence

Ms. Sheryl Faust-Beck
Air Force Portfolio
Manager
HQ AFCEE/DCP
2735 Louis Bauer Drive
Brooks City-Base, TX
78235-5133
(210) 536-9580
[http://www.afcee.brooks.af.mil/
dc/dcp/news/](http://www.afcee.brooks.af.mil/dc/dcp/news/)



U.S. AIR FORCE