Castleton HousingBrixx Newsletter

March 2018

CASTLETON

Contents

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Introduction

It was great to meet so many of you who took part in the user groups during January and the product scoping sessions in February. It was also good to catch up at the NHF Finance conference in March on the Castleton stand. We look forward to meeting more of our users in the forthcoming user sessions and scoping workshops this Spring.

This is our regular newsletter to keep you up to date with ongoing initiatives and inform / invite you to proposed new projects at HousingBrixx. We are also letting you know about the progress of in-flight projects and informing you of what to expect from the HousingBrixx team during our continuous plan to deliver more advanced, new and better products and customer services.

Projects

At Castleton, our philosophy regarding development of the HousingBrixx system is moving to an approach that is more proactive in consulting the user base and partners with respect to enhancements and desired functionality. This will bring a more structured approach to our investment in the development of the system. A number of projects are already well on the way and there will be further opportunities for you to get involved, as explained below.

Later in this newsletter, there is an overview roadmap for the HousingBrixx system which will summarise the projects in this section and where they fall in our development plans. At the moment, this is still high level because we have not completed all the detailed scoping sessions (and therefore don't know the exact content & the time required) but we feel that it's important for you to know what will be forthcoming and roughly when to expect it.

Importer

This project is in-flight and described in more detail in the products section later in this newsletter. You can also contribute to this project via our forums by clicking on this link. Please leave your suggestions and comments and don't forget to "Follow this Forum" (see below) so that you are informed of others' posts and keep up to date with the project.

Dashboard

This is another ongoing project to deliver a new dashboard to the solution. As a new product it is described in more detail in the products section of this newsletter and also has its own forum page here where you can contribute.

Housekeeping

The object set in HousingBrixx has grown over many years and is now very large. We are working on a couple of initiatives to rationalise the content whilst retaining a degree of the required, older functionality. We understand that a lot of our customers still use the old functionality and, for example, have their loan covenants frozen on UK GAAP for a number of years so we are not about to remove this functionality. However, we need to start to remove some of the ancient parts that should no longer be used.

The main mechanism to initiate this is to help users to identify which objects have been superseded and by what. This will be done using a series of switchable warnings that help and encourage users to move away from unsupported objects and migrate plans onto later objects that are being updated and improved all the time.

This housekeeping project also includes an overhaul of the 'Favourites' objects and their Help Texts to make sure that everything is fully up to date. As always, your input is gratefully received and you can get involved via this sub-forum.

Intercompany transactions, Intercompany Loans, Gift Aid & Joint Ventures

Following feedback from the user groups we are running a working group and scoping session on all things intercompany on 26th April in Sutton Coldfield. If you are interested in helping to improve the intercompany functionality in the system then we would encourage you to join us on this date. Email us on this email address if you are able to attend.

Developments

As per the above on intercompany, we will also be running a workshop to review and improve the Developments objects and reporting in the system. A date has not yet been set for this but we are aiming for May or June, depending on how other projects progress, and to suit your diaries. Email us on the usual housingbrixx.admin@castletonplc.com to express your interest and a preferred time of year.

Non Social Housing & Commercial

As per Developments, please get involved!

General enhancement requests

In the last newsletter we included some information about moving to an automated, web-based ticketing system for support purposes. For other internal Castleton reasons we are delaying this slightly while the back-office systems are improved to enable a wider function including:

- Handling of support requests
- A knowledge base for customer reference
- Web-based interface to view and update ticket status
- Reporting of Castleton's performance on support queries
- Handing of product features and enhancement requests

Whilst we are undertaking these back-office changes we do not want to delay the mechanism by which you can inform us of your enhancements and suggestions. Therefore, we are going to move this function to the forum where you currently download the

solution. There is a specific [features section](#) where we invite you to post enhancement and feature requests. If you agree or disagree with any of the proposals then please express your opinions – we will use this information to promote items up or down the development list, according to their popularity.

Training

We have set open training dates for the coming quarter and you can download the list of these [here](#). In response to your feedback, we are now going to run extra courses in the more central location of Sutton Coldfield. Open training courses will carry on in Henley, and we'll continue to deliver selected courses at your offices, on request. If you have any other preferred locations for public training courses then let us know and if we have enough interest we will run them.

We have changed the names of the, slightly misleading, "Foundation" and "Advanced" courses to "Day 1" and "Day 2", in response to your queries. The old naming convention suggested that users could see their way around a HousingBrixx model by attending only the first course. However, the content of the courses is very different and the second day is no more difficult than the first – it just deals with different topics. Both days are required for users to be able to build and flex a HousingBrixx model and hopefully the new naming convention will help to explain this.

HousingBrixx communications & IT

As per the January newsletter, you may need to ask your IT departments to whitelist housingbrixx.admin@castletonplc.com in order to ensure that our emails to you are delivered. Following further investigation, our IT has recommended that you also add the following email address to your safe lists.

housingbrixx.admin=castletonplc.com@cmail19.com

The irony of sending you this information via an emailed newsletter is not lost on us so all newsletters are now being archived to the Castleton plc website in a [new section](#).

On the same HousingBrixx section of the Castleton website (referred to as Strategic Modelling) you can also download a new series of tutorials. These "Top Tips" tutorials provide additional insight into best-practice methods of completing certain tasks; explanation of often-unknown functionality; and introductions to new features. Some of these may be generic functions within the Planner platform and others may be specific to the HousingBrixx solution. The first of these addresses the Search function in Planner and how to use it to update your plans a little easier. You can download this [here](#).

Hosting

As per our last newsletter, you are telling us that a centrally-hosted version of HousingBrixx would be really useful. We have fifteen customers who are now interested in trialling this service so we have linked up with [Castleton Managed Services](#) to provide HousingBrixx in the cloud.

This multi-tenanted, hosted version of the HousingBrixx system, which will alleviate customer IT issues and expand our range of services, is currently in testing with some of the largest and most complex HousingBrixx models and in the coming months we will be releasing this for general testing to the fifteen organisations.

All updates will be taken care of by us, automatically on release and you will be able to open your plans in a chosen version of the system (current version and previous version, for example). You simply log in; choose your version; open your plan and work as normal. The system is available 24/7 from any location with an internet connection. Plans are backed up automatically and disaster recovery systems are in place as standard.

If you would like to get involved in this or think it might be useful for you then please contact us on this email and we'll be in touch once this is live.

We also have a forum area here where you can post your comments.

User Groups and meetings

Castleton Technology is holding its 3rd Breakfast Briefing in Dublin on the 30th April 2018 and we would be delighted if you could attend.

The briefing is aimed at current and prospective customers and will consist of a number of demonstrations & round table discussions on our new developments like Castleton.Digital and AI and we will also be launching our new Castleton Housing and CEDRM solutions.

Breakfast Briefing
Dublin

30th April 2018

The Spencer Hotel
Dublin

We will also be holding a HousingBrixx User group for all customers using the financial modelling tool in Ireland (or in the UK!).

It's free to attend and breakfast/refreshments are provided on the day.

Please click on the box below to confirm your place.

Book your place now

Products and roadmaps

HousingBrixx

Since our last newsletter we have released a maintenance update in March which addresses a few critical bugs and addresses some over-zealous warnings that were introduced in December. Full details of the build notes and the install file can be downloaded from our forum download area.

Our next release of the HousingBrixx solution will deliver the FFR 2018 & SHR returns and work is progressing well. This build addresses very few issues and focusses almost exclusively on the regulatory returns. It includes a new validation report for the FFR so that users will be able to check for hard & soft errors before exporting the plan to the FFR. We hope that this will save a lot of time in completing the return. Assuming that there are no last-minute surprises from the HCA or SHR then we are on track to deliver this towards the end of April.

After that we aim to release quarterly and, we anticipate releasing updates according to the following approximate timescales. We will provide more accurate roadmaps once we have scoped and completed technical specifications for all the projects. The definition of a "quarter" in the roadmap below is the financial quarter where the year starts April 1st 2018.

Overview roadmap

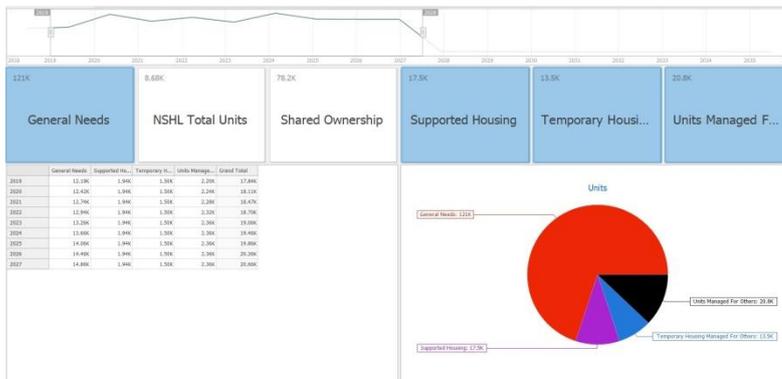| Release	Content
Q1 April 2018	Functionality to support 2018 FFR & SHR submissions Minor bug fixes Planner version 4.3 launch including - changes to report formatting - a new, faster Account Selector - improvements when making & breaking parent/child object relationships - ability to export & archive the History List - general fixes & enhancements
Q2 Summer 2018	Enhanced Importer Begin overhaul of "Favourites" objects including Help Text Housekeeping exercise to begin process of providing a migration pathway to help and encourage users upgrade to better objects. Provision of hosted HousingBrixx Beta-testing platform using the above Overhaul of development objects

Q3 Autumn 2018	Dashboard phase 1 delivery
	Enhancements to model Intercompany, JVs & Gift Aid
	Enhancements to model non-social housing and commercial
	Extended housekeeping exercise
	Inclusion of important new functionality as indicated by users
Q4 Spring 2019	Completion of housekeeping exercise to rationalise object set
	Dashboard phase 2/3 scoping
	Additional user-driven functionality

This is an intended roadmap at the point of publishing and timings are likely to change once we have completed scoping and technical documentation.

Graphing & Dashboards

On 8th March we held the preliminary meeting of the Dashboard Working Group at our head offices in Sutton Coldfield. Thanks to those who braved the weather and gave up their time in exchange for lunch, we were able to establish the first pass of requirements for the new HousingBrixx dashboard.

Phase 1 of this project will deliver a dashboard of standard VfM metrics and is due for delivery in the autumn.

There will be further meetings and workshops so if you are interested in joining this initiative then let us know by emailing housingbrixx.admin@castletonplc.com.

Phase 2 of the project will deliver multiple scenarios in the dashboards. Phase 3 will be a fully-interactive dashboard that allows the user to change values of key inputs in the dashboard itself. Those inputs will be pushed back through the HousingBrixx model, the outputs captured and used to update the dashboard, without the requirement to run the HousingBrixx plan.

If you would like to contribute to this project from a distance then we have set up a new project area on the forum for this purpose. Please let us know your views via that medium.

Importer

On 27th February we held a scoping session for the HousingBrixx Importer. In summary, the general consensus is that this is a really useful product that saves users many days of time but that it also needs to be:

- kept up to date with the latest changes to the HousingBrixx development objects
- de-restricted with respect to the 100 lines
- extended to allow the import of other external information
- productised and supported via the help desk and accompanying documentation
- licensed and with a proper installer
- developed in partnership with SDS and M3 so that the outputs from PamWin & Proval are compatible with the import formats of the HousingBrixx Importer

The first step in this project has been to update the Importer with respect to the first point above and to publish a video on the forum explaining current functionality. Users are now invited to comment on the functionality described in the video and make suggestions on the forum for future enhancements. Please let us have your comments by the middle of April so that we can draw up technical specifications while your Year End work is underway.

Pamwin & SDS have been included on this project and are happy to be involved and work in partnership with us on this.

We are now updating the installer for the Importer and then it will be made available for download once we have completing testing.

HousingBrixx dates for your diary

11th April – Day 1 HousingBrixx training, Castleton offices, Sutton Coldfield, sign up here

12th April – Day 2 HousingBrixx training, Castleton offices, Sutton Coldfield, sign up here

26th April – Intercompany, Gift Aid & Joint Venture scoping workshop, Castleton offices, Sutton Coldfield. If you are interested in contributing to this scope, there are a few places left, please contact us on housingbrixx.admin@castletonplc.com

30th April – Castleton breakfast briefing and HousingBrixx Irish User Group meeting, Dublin. Sign up here.

16th May – Day 1 HousingBrixx training, Castleton offices, Henley, sign up here

17th May – Day 2 HousingBrixx training, Castleton offices, Henley, sign up here

19th June – Report Writer HousingBrixx training, Castleton offices, Henley, sign up here

20th June – Day 1 HousingBrixx training, Castleton offices, Henley, sign up here

21st June – Day 2 HousingBrixx training, Castleton offices, Henley, sign up here