Oracle
Primavera Unifier
Facilities and Asset Management User Guide

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Title and Copyright Information

Oracle Primavera Unifier Facilities and Asset Management User Guide

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Contents

Introduction

Within our documentation, some content might be specific for cloud deployments while other content is relevant for on-premises deployments. Any content that applies to only one of these deployments is labeled accordingly.

> **Note**: The instructions and information presented in the documentation are based on an out-of-the-box (OOTB) setup and before being customized by the user.

The Facility and Asset Lifecycle Management (FALM) solution integrates the following core functional areas within an enterprise:

- **Real estate portfolio management:** This area involves activities associated with the acquisition (including purchase and lease), financial management and disposition of real property assets. Common features that support real estate management include strategic planning, transaction management, request for proposal (RFP) analysis, lease analysis, portfolio management, tax management, lease management, and lease accounting.
- **Capital project management:** This area involves activities associated with the design and development of new facilities and the remodeling or enhancement of existing facilities, including their reconfiguration and expansion. Common features that support capital project management include capital planning, design, funding, bidding, procurement, cost and resource management, project documentation and drawing management, scheduling, and critical path analysis.
- **Facilities management:** This area covers activities related to the operation and optimized utilization of facilities. Common features that support facility management include strategic facilities planning, space management, site and employee service management, and move management.
- **Maintenance management:** This area covers activities related to the corrective and preventive maintenance and operation of facilities and assets. Common features that support maintenance management include asset management, work requests, preventive maintenance, work order administration, warranty tracking, inventory management, vendor management and facility condition assessment.
- **Sustainability and utilities management:** This area covers activities related to the measurement and reduction of resource consumption (including energy and water) and waste production (including greenhouse gas emissions) within facilities. Common features that support sustainability and utilities management include integration with building systems, sustainability performance metrics, utilities benchmarking, carbon emissions tracking, and energy efficiency analysis.

Facilities and Asset Management (FAM)

If you have access to the Facilities and Asset Management feature, it helps enterprises streamline the processes of managing their facilities and real estate capital through:

- Portfolio Management
- Cost Management and Budgeting

- Vendor and Contract Management
- Asset Lifecycle Management
- Maintenance Management
- Material Inventory Management
- Space Management
- Facility Condition Management
- Lease Management
- Transaction Management
- Real Estate Data Management
- Utilities Management
- Sustainability Management

About this Guide

Audience

Anyone who wants to use Facilities and Asset Management (FAM) should read this guide.

Content

The instructions in this guide are only applicable if you have prepared and configured the necessary data that you need for using FAM.

Notes:

- This guide does not include instructions for existing system components (such as uDesigner, Document Manager, Standards & Libraries, and so forth) that are covered in other documents.
- The information in this guide is based on the default setup of the system and the information common to all components appears at the beginning of this guide.

Before you continue, ensure that you set your preferences in the system. Refer to the *Unifier General User Guide* for details.

If you are using Unifier for the *first time*, review the Getting Started section of the *Unifier General User Guide* to get acquainted with the application, its navigation, and the following topics:

- Information for First Time Users
- Configuring Your System for Unifier
- Supported Browsers and Settings
- User Name and Password
- Sign In, Sign Out, and Session Timeout
- Security Warnings
- File Viewer Option
- Signing In to Self-Service Portal
- Unifier User Interface
- Preferences

This guide provides details about the following components of FAM:

- **Facilities Management**
- **Real Estate Management**
- **Portfolio Management**
- **Cost Management**
- **Vendor Management**

The **Facilities Management** section explains the following topics:

- Asset Management
- Maintenance Management

- Inventory Management
- Space Planning and Management
- Facility Condition Assessment

The **Real Estate Management** section explains the following topics:

- Lease Management and Administration
- Real Estate Transaction Management
- Real Estate Data Management
- Utilities and Sustainability Management

The **Portfolio Management** section explains the following topics, which are common in FAM:

- Pre-defined properties portfolio hierarchy
- Data rollup and dashboards across the entire portfolio and at every hierarchy level
- Space Demand and Capacity tracking
- Occupancy Rates tracking
- Maintenance Costs tracking across the portfolio
- Lease administration tracking across the portfolio
- Cost Transactions rollup and tracking across the portfolio

The **Cost Management** section explains the following topics, which are common in FAM:

- Cost control
- Cost transactions
- Annual Budget
- Budget Changes
- Budget Transfers
- Master Service Agreements
- Facility Requests For Bid
- Purchase Orders
- Purchase Order Amendments
- Invoices-General Spends
- Invoices-Generic

The **Vendor Management** section explains the following topics, which are common in FAM:

- Vendor Detailed Records
- Vendor Pre-qualification Process
- Vendor Evaluation Process
- Master Service Agreements
- Facilities Bid Management and Award

In addition, this guide includes the following topics:

- All Properties, Regions, Sites, Buildings, Linear Assets, and Land
- Business Processes
- uDesigner
- Dashboards

- Groups
- User-defined Reports (UDRs)
- Custom Reports
- Custom Prints
- Data Views
- Data Cubes
- Shell Templates

To learn how to use the system, refer to the *Unifier General User Guide*.

To learn how to use uDesigner, refer to the *Unifier uDesigner User Guide*.

To learn about the Administration (Admin) mode and administration features, refer to the *Unifier General Administration Guide*.

To learn about Data Elements and Data Definitions, refer to the *Unifier Data Reference Guide*.

Note: For the full list of system requirements, applications, and application version levels refer to the *Unifier Tested Configurations* document.

Downloading and Configuring FAM

You will find the configuration packages in ***My Oracle Support*** (***https://support.oracle.com/portal/***):

1) Go to ***My Oracle Support*** (***https://support.oracle.com/portal/***) and sign in.
2) Select the **Patches & Updates** tab.
3) In the **Patch Search** block, select the **Product or Family (Advanced)** tab, on the left side.
4) In the **Product** field, enter **Primavera Unifier**.
5) From the **Release** field select the relevant configuration package (Primavera Unifier Configuration Package x.x) and click **Search**. If the configuration package requires a minimum version of Unifier, it will appear under a general release number, for example, 18.x, 19.x.
6) Under the list that the system returns, select the appropriate configuration package, based on your current version of Unifier.
7) After you have downloaded the configuration package, you can proceed with importing it to Unifier. For more information, see **Importing Configuration Packages** in the *Unifier Modules Setup Administration Guide*.

Configuring FAM

Access to system functionality is granted through permissions. The ability to utilize a specific function depends on permissions settings. Refer to the *Unifier General Administration Guide* for information about the Business Processes permission settings necessary for the users and groups.

See the following sections of this guide for configuration-related information:

- ***uDesigner*** (on page 18)
- ***Data Structure Setup*** (on page 22)
- ***Dashboards*** (on page 29)
- ***Groups*** (on page 32)
- ***Shell Templates*** (on page 33)

Components of FAM

FAM has preconfigured designs for:

- Business Processes
- Configuration Managers
- Space Managers

With FAM, you receive the following components:

- Facilities Management
- Real Estate Management
- Portfolio Management
- Cost Management

Note: Although included in this guide, Vendor Management is not considered a component of FAM. Vendor Management enables you to manage the processes related to the vendors, which includes: Vendor Master BP, Vendor Pre-qualification, Vendor Evaluation, RFP sent to Vendors, Contract Award to Vendors, and so forth.

In addition, you receive:

- Selected platform structure to support the included Business Processes (BPs) and Shells
- A suite of Business Processes (BPs) that work together to accomplish the tasks
- Preset Company-level and Shell-level groups that you can assign users to
- A suite of reports to keep you abreast of project status

Notes:

- A selected number of existing Unifier nodes, modules, or sub-modules (such as Document Manager, Standards & Libraries, and so forth) are also included in FAM.
- FAM has preconfigured users, groups, designs for Business Processes, Configurable Managers, and Space Manager.

In This Section

uDesigner

You can access the uDesigner node through the left navigation pane (Navigator), in the Company Workspace tab (Admin mode). The uDesigner node contains the following modules and sub-modules that have been set up for the operation of FAM:

- Business Processes
- Configurable Modules
- Cost Manager

> **Note**: Cost Manager is a Configurable manager and allows you to select Fund, Cost, and Account Code attributes.

- Document Manager
- Portfolio Manager
- Schedule Manager
- Space Manager
- Shell Manager
- User Administration

> **Note**: The following provides details related to Configurable Modules (managers), Document Manager, Resource Manager, Space Manager, and Shell Manager objects.

Configurable Modules (managers)

You can access the Configurable Modules (managers) functional node and work with the applicable managers, nodes, sub-nodes, sheets, forms, logs, components, sub-components, and so forth from the **Configurable Modules** functional node. The node has the following managers:

FCA Manager

The Facility Condition Assessment (FCA) is a Project/Shell level *Code-based* type manager with the following components:

- Detail Form
- Picker

- **Generic Cost Manager**

  The Generic Cost Manager is a Project/Shell level *Generic Cost* type manager with the following components:

  - Detail Form
  - Picker

- **Material Inventory Manager**

  The Material Inventory Manager is a Project/Shell level Code and *Record-based* type manager with the following components:

  - Detail Form

- Log (contains Standard, Advanced, and Reference Processes sub-components)
- Integration (contains Details sub-component)

To access the Configurable Modules node:

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Configurable Modules**.

Document Manager

You can access the Document Manager and work with the applicable managers, sheets, forms, logs, components, managers, nodes, sub-nodes, sheets, forms, logs, components, sub-components, and so forth from the **Document Manager** node.

The node contains the Folder and Document Attributes manager. The Folder and Document Attributes manager is a Company level and DMS Attributes type manager and contains the following components:

- Folder Properties
- Document Properties
- Log

To access the Document Manager node:

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Document Manager**.

Space Manager

You can access the Space Manager and work with the applicable managers, sheets, forms, logs, components, managers, nodes, sub-nodes, sheets, forms, logs, components, sub-components, and so forth from the **Space Manager** node. The node has the following managers:

- **Building Common Area**

  The Building Common Area manager is a Project/Shell level Space type manager and contains the following components:

  - Detail Form
  - Log (contains Standard, Advanced, and Reference Processes sub-components)
- **Common Area**

  The Common Area manager is a Project/Shell level Space type manager and contains the following components:

  - Detail Form
  - Log (contains Standard, Advanced, and Reference Processes sub-components)
- **Gross Building Area**

  The Gross Building Area manager is a Project/Shell level Space type manager and contains the following components:

  - Detail Form

- Log (contains Standard, Advanced, and Reference Processes sub-components)
- **Gross Measured Area**

  The Gross Measured Area manager is a Project/Shell level Space type manager and contains the following components:

  - Detail Form
  - Log (contains Standard, Advanced, and Reference Processes sub-components)
- **Leasable Spaces**

  The Leasable manager is a Project/Shell level Space type manager and contains the following components:

  - Detail Form
  - Log (contains Standard, Advanced, and Reference Processes sub-components)
- **Levels**

  The Levels manager is a Project/Shell level Level type manager and contains the following components:

  - Detail Form
  - Log
- **Major Vertical Penetration**

  The Major Vertical Penetration manager is a Project/Shell level Space type manager and contains the following components:

  - Detail Form
  - Log (contains Standard, Advanced, and Reference Processes sub-components)
- **Store Area**

  The Store Area manager is a Project/Shell level Space type manager and contains the following components:

  - Detail Form
  - Log (contains Standard, Advanced, and Reference Processes sub-components)
- **Usable Space**

  The Usable Space manager is a Project/Shell level Space type manager and contains the following components:

  - Detail Form
  - Log (contains Standard, Advanced, and Reference Processes sub-components)

To access the Space Manager node:

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Space Manager**.

Shell Manager

You can access the **Shell Manager** and work with the applicable shells, managers, nodes, sub-nodes, sheets, forms, logs, components, sub-components, and so forth from the **Shell Manager**. The Shell Manager has the following Shell type managers:

- **All Properties**

The All Properties manager contains the following components:

- Detail Form
- Log (contains Standard and Advanced sub-components)
- Integration (contains Detail form component)

- **Buildings**

  The Buildings manager contains the following components:

  - Detail Form
  - Log (contains Standard and Advanced sub-components)
  - Integration (contains Detail form component)

- **Land**

  The Land manager contains the following components:

  - Detail Form
  - Log (contains Standard and Advanced sub-components)
  - Integration (contains Detail form component)

- **Linear Assets**

  The Linear manager contains the following components:

  - Detail Form
  - Log (contains Standard and Advanced sub-components)
  - Integration (contains Detail form component)

- **Regions**

  The Regions manager contains the following components:

  - Detail Form
  - Log (contains Standard and Advanced sub-components)
  - Integration (contains Detail form component)

- **Sites**

  The Sites manager contains the following components:

  - Detail Form
  - Log (contains Standard and Advanced sub-components)
  - Integration (contains Detail form component)

To access the Shell Manager node:

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Shell Manager**.

User Administration

You can access the User Administration to work on user attributes. The User Administration has the following functional sub-nodes:

- **User Attributes - Home**
  - Additional Attributes
  - Log

        - Company Users Log
        - Partner Users Log
    - Integration
        - Users
    - Picker

To access the User Administration node:

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **User Administration**.

Data Structure Setup

You can access the Data Structure Setup node through the left Navigator, in the Company Workspace tab (Admin mode). The Data Structure Setup node contains the following modules and sub-modules that have been set up for the operation of FAM:

- System Modules
- Data Cube Definitions
- Data Definitions
- Basic
- Data Picker
- Data Elements
- Data Indexes
- Data Views
- Dynamic Data Sets
- Reports
    - Custom
    - System
- Statuses
    - Line Item Statuses
    - Record Statuses
    - Tags
- ER Views

Refer to the *Unifier General Administration Guide* for details.

Data Views

FAM contains the following Data Views:

- Properties_sitebui
- Portfolio_byowners
- Usable_Space
- Spaceassignmentgra
- Space_rqsts_Assgnm

- Property_Acq
- Space_rqsts_Ass_TL

Data Cubes

FAM contains the following Data Cubes definitions:

- Buildings by Space Type Dashboard
- CurrAvailability of Usable space
- Invoices - General Spends
- Lease Payments
- Leases
- Material Requests CWO
- Material Requests PWO
- Maintenance Management CWO
- Maintenance Management PWO
- Occupancy Over time
- Portfolio by ownership
- Portfolio by ownership - All properties
- Portfolio by ownership-view
- Property Ownership
- Property Ownership Information
- Purchase Orders - FM
- PurchaseOrdersFM-Type of PO - Material
- PurchaseOrdersFM-Type of PO - Service
- PurchaseOrdersFM-Type of PO -Both
- Space requests over time
- Space requests over time-allproperties
- usable Space
- Usable Space - sites
- Usable Space - sites level

FAM Business Processes (BPs) Types

The following Business Processes (BPs) types are available for FAM:

- Cost
- Line Item
- Request for Bid (RFB)
- Simple
- Text
- Document Type
- Shell Creation

The FAM BPs are available for the following levels:

- Project/Shell
- Company

The FAM BPs are listed and accessible under the FAM Master Logs node:

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.
2) In the left Navigator, select **FAM Master Logs**.

Alternatively, you can navigate to the Shell and view the BP from the Shell Log.

The FAM BPs are categorized as follows:

General

- Employees
- PM-Roles
- Master Service Agreements

Cost Management

- Annual Budget
- Budget Changes-FM
- Budget Transfers-FM
- Facility Requests for Bid
- Purchase Orders-FM
- Invoices-General Spends-FM
- Invoices-Generic-FM

Asset Management

- Assets
- Assets Creator
- Asset Templates

Facilities Management

- Space Assignments
- Move Work Orders
- Room Reservations

Maintenance Management

- Preventive Work Orders
- Corrective Work Orders
- PM Book Templates
- PM Books
- Job Plans
- Meters
- Facility Inspections

Material Management

- Material SKUs Master
- Material Requests for CWO

- Material Requests for PWO
- Materials Received

Lease Management

- Leases
- New Lease Requests
- Lease Termination
- Lease Amendment Requests
- Lease Actions
- Lease Payments
- Lease Invoices
- CAM Reconciliation

RE Transaction Management

- Prospective Properties
- Property Acquisitions
- Property Dispositions

RE Data Management

- Parcels
- Deeds
- Permits
- Titles
- Easements
- Property Taxes
- Real Estate Payments
- Certificate of Insurance

Energy Management

- LEED Realized Benefits
- LEED Certification Levels
- LEED Certifications
- Emissions
- Water Meter
- Waste Generation
- Recycling
- Energy Meter
- Carbon Footprint

The following sections provide lists of the BPs available in FAM. You can find more information about the BPs available in FAM in the subsequent sections of this guide.

Cost Type BPs

Note: With version 23 and later, a Total row on a non-standard tab of a line item grid is not displayed. For version 22 and earlier, the Total row displays a 0.

List of Cost type BPs

BP Name	BP ID	BP Level
New Lease Requests	unleaser	Project/Shell
Property Taxes	uxpt	Project/Shell
Lease Invoices	uli	Project/Shell
Lease Amendment Requests	urelease	Project/Shell
CAM Reconciliation	ucr	Project/Shell
Annual Budget	uab	Project/Shell
Master Service Agreements	umsa	Project/Shell
Leases	uleases	Project/Shell
Purchase Orders-FM	upof	Project/Shell
PO Amendments-FM	upafm	Project/Shell
Invoices-Generic-FM	uing	Project/Shell
Invoices-General Spends-FM	uigsf	Project/Shell
Budget Changes-FM	ubcfm	Project/Shell
Budget Transfers-FM	ubtfm	Project/Shell
Real Estate Payments	uxrp	Project/Shell
Room Reservation	urr	Project/Shell

Line Type BPs

List of Line Item type BPs

BP Name	BP ID	BP Level
Lease Contacts	ulsco	Company
Preventive Work Orders	upwo	Project/Shell
Facility Inspections	ufi	Project/Shell

BP Name	BP ID	BP Level
Water Meter	uwm	Project/Shell
Waste Generation	uwg	Project/Shell
Recycling	urcy	Project/Shell
Energy Meter	uemr	Project/Shell
Carbon Footprint	ucf	Project/Shell
Vendors	uv	Company
PM Book Templates	upmbt	Project/Shell
Property Acquisitions	upra	Project/Shell
Move Work Orders	umwo	Project/Shell & All Properties
Employees	ue1	Project/Shell
Asset Templates	uatt	Project/Shell
Assets	uat	Project/Shell
Corrective Work Orders	ucwof	Project/Shell
Job Plans	ujpn	Project/Shell
Material Requests for CWO	umr1	Project/Shell
Material Requests for PWO	umrpwo	Project/Shell
Material SKUs Master	uskum	Project/Shell
Materials Received	umatr	Project/Shell
Meters	umt	Project/Shell
PM Books	uapmb	Project/Shell
PM-Roles	upmr	Project/Shell

RFB Type BPs

List of Request for Bid (RFB) type BPs

BP Name	BP ID	BP Level
Facility Requests for Bid	ufrfb	Project/Shell

Simple Type BPs

List of Simple type BPs

BP Name	BP ID	BP Level
Service Requests	usrfm	Company
Work Order Requests	uworc	Company
Certificate of Insurance	uxcoi	Project/Shell
Deeds	uxdeds	Project/Shell
Easements	uxem	Project/Shell
Parcels	uxpar	Project/Shell
Permits	uxpe	Project/Shell
Titles	uxtit	Project/Shell
Move Requests	umvr	Company
Space Assignments	uspa	Project/Shell
Space Requests	usrp	Company
Property Dispositions	upd	Project/Shell
Prospective Properties	upp	Project/Shell
All Properties Single Record	uapro	Company
Space Occupancy Statuses	uspoc	Project/Shell & All Properties
New User Requests	unur	Company
Vendor Prequal Requests	uvpr	Company
Vendors Evaluations	uve	Company
Emissions	uem	Project/Shell
LEED Certification Levels	uleedlvl	Project/Shell
LEED Certifications	ulledc	Project/Shell
LEED Realized Benefits	uleedr	Project/Shell
Building Information	ubi	Project/Shell
Lease Actions	ulskdact	Project/Shell
Lease Termination	uleasetm	Project/Shell
Assets Creator	uatc	Project/Shell

Shell Creation Type BPs

List of Shell Creation type BPs

BP Name	BP ID	BP Level
Property Creation Request	upropcrr	Shell

Dashboards

FAM contains the following custom Dashboards:

Cost Management

Dashboard/Sub-Dashboard Name	Shell Template Location	Template Name	Notes
Purchase Orders tab • Type of PO - Service • Type of PO - Material • Type of PO - Both Invoice-General Spends tab • Invoice- by Status • Invoices- by Amount	Go to Templates, select Shells, and then select Buildings	• MASTER OFFICE BUILDING TEMPLATE • MASTER RETAIL BUILDING TEMPLATE • MASTER WAREHOUSE BUILDING TEMPLATE	NA

Lease Management

Dashboard/Sub-Dashboard Name	Shell Template Location	Template Name	Notes
Leases tab - Lease Class - Lease Type Lease Payments tab - Amount/Status - Payment Type/Status Leases by Expiration Date tab	Go to Templates, select Shells, and then select Buildings	- MASTER OFFICE BUILDING TEMPLATE - MASTER RETAIL BUILDING TEMPLATE	NA

Material Management

Dashboard/Sub-Dashboard Name	Shell Template Location	Template Name	Notes
Corrective WOs tab - CWO By Category - CWO by Status Preventive WOs tab - PWO by Category - Maintenance Management PWO	Go to Templates, select Shells, and then select Buildings	- MASTER OFFICE BUILDING TEMPLATE - MASTER RETAIL BUILDING TEMPLATE - MASTER WAREHOUSE BUILDING TEMPLATE	NA

Space Management

Dashboard/Sub-Dashboard Name	Shell Template Location	Template Name	Notes
Space Demand tab • Available Usable Space • Space Request Trend Space Utilization tab • Usable Space By Space Type • Usable Area by Assigned Department Space Assignments tab • Usable Space by Assigned Department • Usable Space Type by Area Occupancy Duration tab • Occupancy Duration by Assigned Department	Go to Templates, select Shells, and then select Buildings	• MASTER OFFICE BUILDING TEMPLATE • MASTER RETAIL BUILDING TEMPLATE	NA

Portfolio by Ownership

Dashboard/Sub-Dashboard Name	Shell Template Location	Template Name	Notes
Portfolio by Ownership	Go to Company Sponsored Shells, select All Properties, and then select All Properties	NA	Single instance Shell

Site Level Ownership Status

Dashboard/Sub-Dashboard Name	Shell Template Location	Template Name	Notes
Site Level Ownership Status	Go to Templates, select Shells, and then select Sites	MASTER SITE TEMPLATE	NA

Maintenance Management

Dashboard/Sub-Dashboard Name	Shell Template Location	Template Name	Notes
Maintenance Management	Go to Templates, select Shells, and then select Sites	MASTER SITE TEMPLATE	NA

Property Ownership

Dashboard/Sub-Dashboard Name	Shell Template Location	Template Name	Notes
Property Ownership	Go to Templates, select Shells, and then select Regions	MASTER REGION TEMPLATE	NA

Groups

FAM contains the following groups:

- Company-level Groups
  - Accommodation Managers
  - All Company Users
  - Company Administrators
  - Contract Managers
  - Corporate Real Estate
  - Corporate Real Estate Finance
  - FAM Administrators
  - Help Desk
  - Lease Administrators
  - Maintenance Mgmt Services
  - Portal Users
  - Real Estate Managers
  - Resource Managers
  - Space Planners
- Shell-level Groups
  - Accommodation Managers
  - Asset Managers
  - Building Maintenance Managers
  - Building Managers

- Contract Managers
- Corporate Real Estate
- Corporate Real Estate Finance
- Custodial Service Providers
- External Service Providers
- Facilities Environment Managers
- Facility Inspectors
- Facility Managers
- Finance
- Fire Safety Managers
- FAM Administrators
- Grounds Keeping Services
- Help Desk
- HSE Managers
- Lease Administrators
- Maintenance Management Services
- Outdoor Maintenance
- Pest Control
- Planning and Projects Coordinators
- Project Administrators
- Project Managers
- Property Managers
- Real Estate Managers
- Security Managers
- Shop Supervisors
- Space Planners
- Technicians
- Warehouse Managers

Shell Templates

FAM contains the following Shell Templates:

Shell Name	Shell Type
MASTER REGION TEMPLATE	Regions Shell type
MASTER SITE TEMPLATE	Site Shell type
MASTER OFFICE BUILDING TEMPLATE	Buildings Shell type
MASTER RETAIL BUILDING TEMPLATE	Buildings Shell type

Shell Name	Shell Type
MASTER WAREHOUSE BUILDING TEMPLATE	Buildings Shell type

Third-Party Applications

FAM can exchange data with third-party applications.

Primavera Analytics

Analytics supports reporting and analyses of data for:

- Business Processes
- Cost Sheet
- P6 Summary Sheets
- Shells
- Cash Flow
- Company-level Business Processes
- Space Manager
- Custom attributes for Business Processes
- Shell attributes

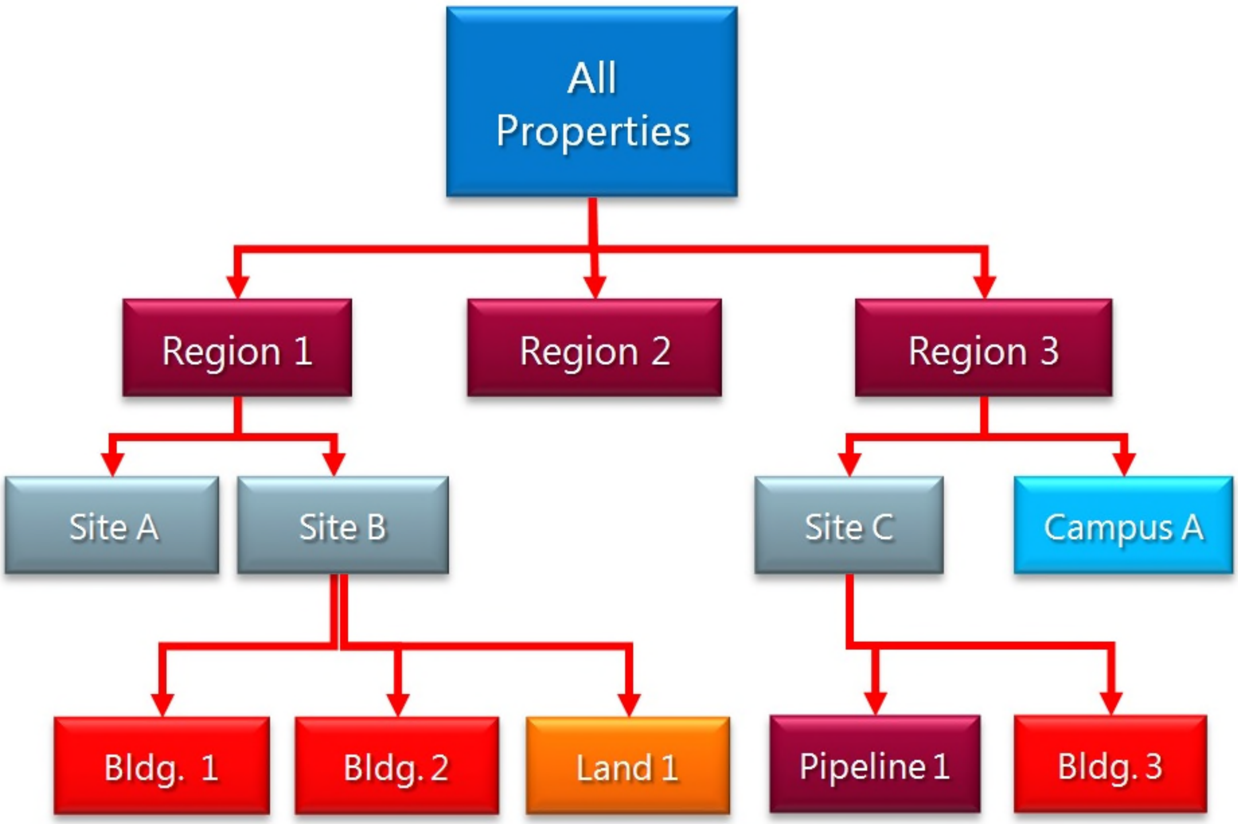
For details, refer to the Unifier user documentation.

FAM Navigation Tabs Structure in Unifier

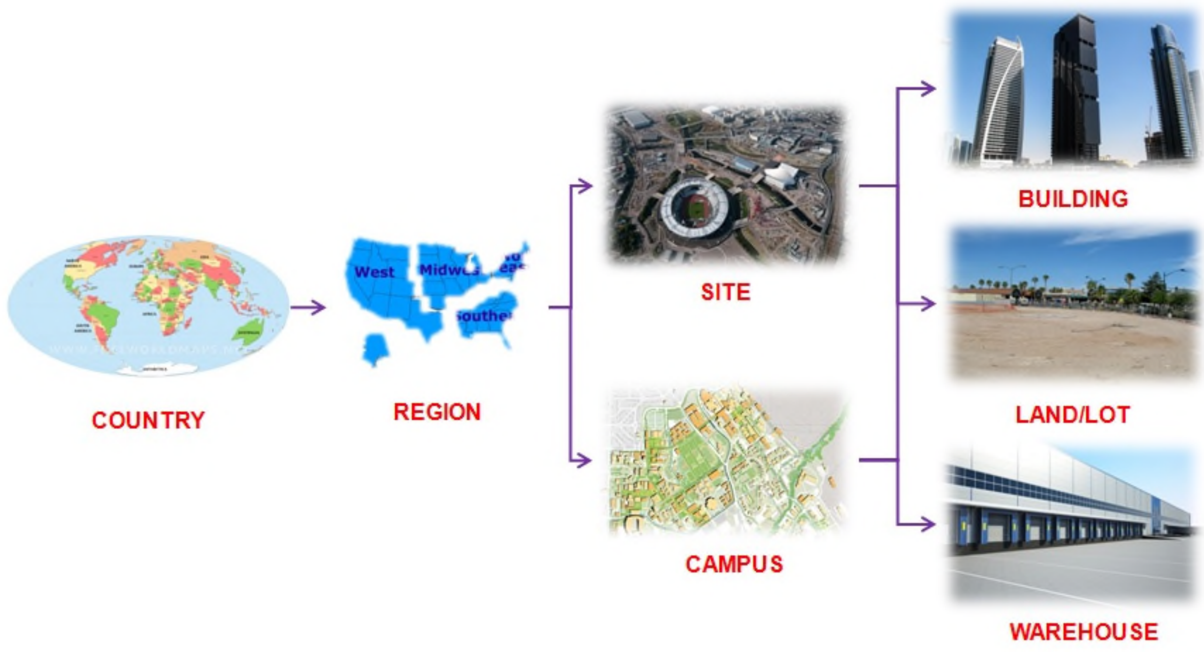
The Facilities and Real Estate feature enables you to organize your portfolio of facilities and properties according to their specific hierarchy needs.

The following demonstrate a diagram and an example of the hierarchy:

Hierarchy Diagram



Hierarchy Example



Unifier Structure for FAM

The structure for Facilities and Real Estate consists of the following parts according to specific hierarchy needs:

- All Properties
- Regions
- Sites
- Buildings
- Linear Assets
- Land

Notes:

- Land and Linear Assets are predesigned Shell types that you can use to create Shells.
- Land and Linear Assets are at the same level as Buildings, in the hierarchy.
- When you create a Land or Linear Assets Shell, the system will place the Shell under Sites type Shells, similar to Buildings.
- With the exception of the All Properties tab, all other tabs must be created by you. You have the option to name the tabs according to your business needs. As it will be explained later in this guide, Regions, Sites, and Buildings are Shell types.
- The system displays the Tasks, Notifications, and Drafts nodes, in the respective Company Workspace and Project/Shell, based on the

deployment of your user mode navigators.

- Refer to the *Unifier General User Guide* for more information about using the Standard View of the Tasks, Company, and Project/Shell logs.

Each part has the following components:

- List of nodes, modules, or sub-modules
- List of BPs used for each module, if applicable

Note: The structure for Facilities and Real Estate also includes Home and Company Workspace, which are discussed in the following sections.

In This Section

Home

The Home workspace enables you to review the following information:

- Announcements
- Items Requiring Your Attention
  - Tasks
  - Messages
  - Draft Records
  - Mailbox
- Tasks or New Mailbox

The left Navigator in the Home workspace enables you to access the following nodes, modules, sub-modules, and Business Processes (BPs):

Notes:

- The Home workspace is only available in User mode.
- The Company administrators can configure the left Navigator to better suit your business needs, for example, creating additional nodes to store Business Process (BP) records, renaming some of the nodes mentioned below, and so forth.
- If the setup of your left Navigator differs from the set up used for this

guide, the basic functionality remains the same.

The left Navigator in the Home workspace contains the following nodes, modules, and sub-modules:

- Tasks
- Messages
- Drafts
- Mailbox
- FAM Master Logs

For information about Tasks, Messages, Drafts, and Mailbox refer to Unifier user and administration guides.

FAM Master Logs

The FAM Master Logs enables you to access the following nodes, modules, sub-modules, and Business Processes (BPs) records, across the entire portfolio:

- General
  - Employees
  - PM-Roles
  - Master Service Agreements
- Cost Management
  - Annual Budget
  - Budget Changes-FM
  - Budget Transfers-FM
  - Facility Requests for BID
  - Purchase Orders-FM
  - Invoices-General Spends-FM
  - Invoices-Generic-FM
- Asset Management
  - Assets
  - Assets Creator
  - Asset Templates
- Facilities Management
  - Space Assignments
  - Move Work Orders
  - Room Reservations
- Maintenance Management
  - Preventive Work Orders
  - Corrective Work Orders
  - PM Book Templates
  - PM Books

  - Job Plans
  - Meters
  - Facility Inspections
- Material Management
  - Material SKUs Master
  - Material Requests for CWO
  - Material Requests for PWO
  - Materials Received
- Lease Management
  - Leases
  - New Lease Requests
  - Lease Termination
  - Lease Amendment Requests
  - Lease Actions
  - Lease Payments
  - Lease Invoices
  - CAM Reconciliation
- RE Transaction Management
  - Prospective Properties
  - Property Acquisitions
  - Property Dispositions
- RE Data Management
  - Parcels
  - Deeds
  - Permits
  - Titles
  - Easements
  - Property Taxes
  - Real Estate Payments
  - Certificate of Insurance
- Utilities Management
  - LEED Realized Benefits
  - LEED Certification Levels
  - LEED Certifications
  - Emissions
  - Water Meter
  - Waste Generation
  - Recycling
  - Energy Meter

- Carbon Footprint

Company Workspace

Company Workspace tab (Admin mode)

The Company Workspace page (the right pane) enables you to review the following information about the company:

- Description
- Administrator
- Home Page URL
- Help URL
- Company Addresses
- Partner Companies

The left Navigator in the Company Workspace tab (Admin mode) contains the following nodes, modules, and sub-modules:

- License Manager
- Partner Companies
- uDesigner
    - Business Processes
    - Configurable Modules
    - Cost Manager
    - Document Manager
    - Portfolio Manager
    - Resource Manager
    - Schedule Manager
    - Space Manager
    - Shell Manager
    - User Administration

> **Note**: The details related to Configurable Modules (managers), Document Manager, Resource Manager, Space Manager, and Shell Manager objects are included in ***uDesigner***.

- Data Structure Setup
    - System Modules
    - Data Cube Definitions
    - Data Definitions
        - Basic
        - Cost Codes
        - Data Picker
    - Data Elements

  - Data Indexes
  - Data Views
  - Dynamic Data Sets
  - Reports
    - Custom
    - System
  - Statuses
    - Line Item Statuses
    - Record Statuses
    - Tags
  - ER Views
- Access Control
- User Administration
  - Company Users
  - Partner Users
  - Groups
- Gateway
  - Business Objects
- Configuration
  - Business Process
  - Portfolio Manager
  - Shell Manager
  - Space Manager
  - Custom Prints and Reports
  - Navigation Tabs
  - User Mode Navigator
  - Landing Page
  - Internationalization
  - Material Inventory Manager
- Standards & Libraries
  - Calendars
  - Cash Flow
    - Data Sources
    - Distribution Profiles
    - Templates
  - Currencies
  - Exchange Rates
  - Permission Templates
  - User Preference Templates

    - Approved Email List
    - Period Structure
    - Seasonal Dates
    - P6 Data Sources
- Company Workspace
    - Business Process Setup
    - Resource Manager
        - Roles
        - Resources
    - Rules
    - Auto-update Status Setup
- Templates
    - Shells
        - Buildings
        - Land
        - Linear Assets
        - Regions
        - Sites
    - Commitment Summaries
    - Configurable Modules
        - FCA Manager
        - Generic Cost Manager
        - Material Inventory Manager
    - Cost Sheets
    - Folder Structures
    - Funding
        - Funding Sheets
        - Commitment Funding Sheets
    - General Spends SOV
    - Reports
    - Rules
    - Schedule Sheets
    - Activity Sheets
- Company Sponsored Shells
- All Properties
    - Buildings
    - Land
    - Linear Assets
    - Regions

  - Sites
- System Reports
- Production Bundles

Company Workspace (User mode)

The Company Workspace page (the right pane) enables you to review the following information about the company:

- Name
- Location
- Administrator
- Home Page URL
- Help URL

The left Navigator in the Company Workspace tab (User mode) contains the following nodes, modules, and sub-modules:

- Summary
- Collaboration
  - Tasks
  - Messages
  - Drafts
- General
- Cost Manager
  - Cash Flow
  - Cost Sheet
  - Funding
- Document Manager
  - Company Documents
  - Unpublished Documents
- Resource Manager
  - Roles
- Company Logs
  - New User Requests
  - Vendor Prequal Requests
  - Vendors Evaluations
  - Vendors
  - Lease Contacts
- Facilities Help Desk
  - Service Requests
  - Work Order Requests
  - Space Requests
  - Move Requests

- Reports
  - User-Defined

All Properties

All Properties is at the top of the hierarchy for organizing your real estate portfolio. The All Properties Shell is a part of Company Sponsored Shells. The ***Shell Manager*** (on page 20) section provides more details about All Properties manager.

All Properties tab (User mode)

You can use the All Properties tab (User mode) to manage the properties by way of the following nodes, modules, sub-modules, and Business Processes (BPs):

> **Note**: This guide explains the new nodes, modules, and sub-modules that are only related to FAM. For details about other nodes, modules, and sub-modules refer to the Unifier user and administration guides.

- Alerts
- Mailbox
  - Drafts
  - Inbox
  - Sent Items
  - Deleted Items
  - Public Items
- Mailbox
- Collaboration
  - Tasks
  - Messages
  - Drafts
- Information
  - Directory
  - General
- Gates
- Document Management
  - Documents
  - Unpublished Documents
- FAM Templates
  - Asset Templates
  - Job Plans
  - PM Book Templates
  - LEED Certification Levels
- Employee Management

  - Employees
- Facilities Contract Management
  - Master Service Agreements
  - Facility Requests for Bid
- Cost Management-FAM
  - Generic Cost Manager
  - Annual Budget
  - Budget Changes-FM
  - Budget Transfers-FM
- Material Management
  - Material SKUs Master
- Move Add Change (MAC)
  - Space Assignments
  - Move Work Orders
- Transaction Management
  - Prospective Properties
  - Property Acquisitions
  - Property Disposition
  - Property Creation Requests
- Reports
  - User-Defined
  - Audit
  - Custom Reports

All Properties tab (Admin mode)

You can use the All Properties tab (Admin mode) to manage the properties by way of the following nodes, modules, sub-modules, and Business Processes (BPs):

- Member Companies
- Access Control
- User Administration
  - Users
  - Groups
- Setup
  - Business Process
  - Dashboards
  - Gates
  - Resource Manager
  - Material Inventory Manager

The Material Inventory Manager allows you to set up Classes:

- Setup Name
- Help File
- Auto Creator
- Send error notification to

Refer to the Unifier user and administration guides for details about the other nodes, modules, and sub-modules.

Regions

Regions is a step below All Properties in the hierarchy for organizing your real estate portfolio. The Regions Shell is a part of Company Sponsored Shells. The ***Shell Manager*** (on page 20) section provides more details about Regions manager.

Regions tab (User mode)

You can use the Regions tab (User mode) to manage the regions by way of the following nodes, modules, sub-modules, and Business Processes (BPs):

> **Note**: This guide explains the new nodes, modules, and sub-modules that are only related to FAM. For details about other nodes, modules, and sub-modules refer to the Unifier user and administration guides.

- Alerts
- Mailbox
  - Drafts
  - Inbox
  - Sent Items
  - Deleted Items
- Collaboration
  - Tasks
  - Messages
  - Drafts
- Information
  - Directory
  - General
- Document Manager
  - Documents
  - Unpublished Documents
- Cost Management-FAM
  - Generic Cost Manager
  - Commitment Summaries
  - Annual Budget
  - Budget Changes-FM

    - Budget Transfers-FM
    - PO Amendments-FM
    - Invoices-Generic-FM
    - Invoices-General Spends-FM
- Transaction Management
    - Prospective Properties
    - Property Acquisitions
    - Property Creation Requests
- Reports
    - User-Defined
    - Audit

Regions tab (Admin mode)

You can use the Regions tab (Admin mode) to manage the regions by way of the following nodes, modules, sub-modules, and Business Processes (BPs):

- Member Companies
- Access Control
- User Administration
    - Users
    - Groups
- Setup
    - Business Process
    - Dashboards
    - Gates
    - Resource Manager
    - Material Inventory Manager

The Material Inventory Manager allows you to set up Classes:

- Setup Name
- Help File
- Auto Creator
- Send error notification to

Refer to the Unifier user and administration guides for details about the other nodes, modules, and sub-modules.

Sites

Sites is a step below Regions in the hierarchy for organizing your real estate portfolio. The Sites Shell is a part of Company Sponsored Shells. The ***Shell Manager*** (on page 20) section provides more details about Sites manager.

Sites tab (User mode)

You can use the Sites tab (User mode) to manage the sites by way of the following nodes, modules, sub-modules, and Business Processes (BPs):

> **Note**: This guide explains the new nodes, modules, and sub-modules that are only related to FAM. For details about other nodes, modules, and sub-modules refer to the Unifier user and administration guides.

- Alerts
- Mailbox
  - Drafts
  - Inbox
  - Sent Items
  - Deleted Items
  - Public Items
- Collaboration
  - Tasks
  - Messages
  - Drafts
- Information
  - Directory
  - General
- Document Manager
  - Documents
  - Unpublished Documents
- Facilities Contract Management
  - Master Service Agreements
- Cost Management-FAM
  - Generic Cost Manager
  - Commitment Summaries
  - Annual Budget
  - Budget Changes-FM
  - Budget Transfers-FM
  - Purchase Orders-FM
  - PO Amendments-FM
  - Invoices-Generic-FM
  - Invoices-General Spends-FM
- Asset Management
  - Assets Creator
  - Assets
  - Meters

- Maintenance Management
  - Corrective Work Orders
  - Preventive Work Orders
  - PM Books
  - PM-Roles
- Transaction Management
  - Prospective Properties
  - Property Acquisitions
  - Property Dispositions
  - Property Creation Requests
- Reports
  - User-Defined
  - Audit

Sites tab (Admin mode)

You can use the Sites tab (Admin mode) to manage the sites by way of the following nodes, modules, sub-modules, and Business Processes (BPs):

- Member Companies
- Access Control
- User Administration
  - Users
  - Groups
- Setup
  - Business Process
  - Dashboards
  - Gates
  - Resource Manager
  - Material Inventory Manager

The Material Inventory Manager allows you to set up Classes:

- Setup Name
- Help File
- Auto Creator
- Send error notification to

Refer to Unifier user and administration guides for details about the other nodes, modules, and sub-modules.

Buildings

Buildings is a step below Sites in the hierarchy for organizing your real estate portfolio. The Buildings Shell is a part of Company Sponsored Shells. The ***Shell Manager*** (on page 20) section provides more details about Buildings manager.

Buildings tab (User mode)

You can use the Buildings tab (User mode) to manage the buildings by way of the following nodes, modules, sub-modules, and Business Processes (BPs):

> **Note**: This guide explains the nodes, modules, and sub-modules that are related only to FAM. For details about other nodes, modules, and sub-modules, refer to the Unifier user and administration guides.

- Alerts
- Mailbox
  - Drafts
  - Inbox
  - Sent Items
  - Deleted Items
  - Public Items
- Mailbox
- Collaboration
  - Tasks
  - Messages
  - Drafts
- Information
  - Directory
  - General
- Gates
- Document Manager
  - Documents
  - Unpublished Documents
- Facilities Contract Management
  - Facility Requests for Bid
- Cost Management-FAM
  - Generic Cost Manager
  - Commitment Summaries
  - Annual Budget
  - Budget Changes-FM
  - Budget Transfers-FM
  - Purchase Orders-FM

  - PO Amendments-FM
  - Invoices-Generic-FM
  - Invoices-General Spends-FM
- Asset Management
  - Assets Creator
  - Assets
  - Meters
- Maintenance Management
  - Corrective Work Orders
  - Preventive Work Orders
  - PM Books
  - PM-Roles
- Material Management
  - Sheets
- Facility Condition Assessment
  - Facility Inspections
  - FCA Manager
- Space Management
  - Levels
  - Levels Sheet
  - Usable Space
  - Leasable Spaces
  - Building Common Area
  - Store Area
  - Major Vertical Penetration
  - Gross Measured Area
  - Gross Building Area
  - Stack Plans
- Lease Management
  - New Lease Requests
  - Leases
  - Lease Actions
  - Lease Amendment Requests
  - Lease Termination
  - Lease Invoices
  - Lease Payments
  - CAM Reconciliation
- Reservation Management
  - Room Reservations

- Move Add Change (MAC)
  - Space Assignments
- Real Estate Data Management
  - Deeds
  - Easements
  - Titles
  - Parcels
  - Real Estate Payments
  - Permits
  - Property Taxes
  - Certificate of Insurance
- Utilities Management
  - Emissions
  - Recycling
  - Energy Meter
  - Water Meter
  - Waste Generation
  - Carbon Footprint
- Sustainability Management
  - LEED Certifications
  - LEED Realized Benefits
- Reports
  - User-Defined
  - Audit

Buildings tab (Admin mode)

You can use the Buildings tab (Admin mode) to manage the buildings by way of the following nodes, modules, sub-modules, and Business Processes (BPs):

- Member Companies
- Access Control
- User Administration
  - Users
  - Groups
- Setup
  - Business Process
  - Dashboards
  - Gates
  - Resource Manager
  - Material Inventory Manager

The Material Inventory Manager allows you to set up Classes:

- Setup Name
- Help File
- Auto Creator
- Send error notification to

Refer to the Unifier user and administration guides for details about the other nodes, modules, and sub-modules.

Linear Assets

You can use a Linear Assets Shell to keep track of linear assets such as roads, rails, pipelines, and power lines. Linear Assets are predesigned Shell types that you can use to create Shells. Linear Assets are at the same level as Buildings, in the hierarchy, so when you create a Linear Assets Shell, the system places the Shell under the Sites type Shells, similar to Buildings. The ***Shell Manager*** (on page 20) section provides more details about Linear Assets manager.

Land

You can use a Land Shell to keep track of land properties (owned or leased). In addition, you can enable any kind of BP, and managers, under Land type Shell. Land is predesigned Shell type that you can use to create Shells. Land is at the same level as Buildings, in the hierarchy, so when you create a Land Shell, the system places the Shell under the Sites type Shells, similar to Buildings. The ***Shell Manager*** (on page 20) section provides more details about Land manager.

Set Up FAM

Refer to the *Unifier General User Guide* for information about signing in and out of the application.

The following list describes all the steps that need to be completed before you can use FAM:

1) Add users to the company (Refer to the *Unifier General Administration Guide*.)
2) Assign users to the preconfigured groups if they are working on the company workspace. (Refer to the *Unifier General Administration Guide*.)
3) Review the shell templates provided with FAM. If you need to make changes, copy and modify the template to suite your business needs. (go to Admin and then select Templates)
4) Review the preconfigured groups. Make changes to existing groups or create new groups. (Refer to the *Unifier General Administration Guide*.)
5) Create a shell (Region, Site, or Building) instance using the templates. (Refer to the *Unifier General Administration Guide*.)
6) Add users to the shell and assign them preconfigured groups. (Refer to the *Unifier General Administration Guide*.)
7) Modify the All Properties Single Record Business Process (BP). (See ***Modifying the All Properties Single Record***.)
8) Specify the Space Occupancy Statuses. (See ***Specifying the Space Occupancy Statuses***.)
9) Set up the following FAM templates: Asset Templates, Job Plans, and PM Book Templates.

In This Section

Modifying the All Properties Single Record

Use the All Properties Single Record Business Process (BP) to select the default root shell node.

To select the All Properties Single Record:

1) Ensure that you are at the **Company Workspace** level.
2) From the User mode navigator, select **General**.
3) From the **General** log, select **All Properties Single Record** and click **Open**.
4) Click **Edit**.
5) Click **Select** and choose **All Properties Single Record**.
6) Click **Finish Editing** to save the form.

Specifying the Space Occupancy Statuses

Use the Space Occupancy Statuses (BP) to select the default space statuses. The space status values you pick here are referenced by other business processes.

To select the space occupancy statuses:

1) Ensure that you are at the **All Properties** level.
2) From the User mode navigator, select **General**.
3) From the **General** log, select **Space Occupancy Statuses** and click **Open**.
4) Refer to the table below to select default values.
5) Click **Finish Editing** to save the form.

In this field:	Select this:
Default Status for Vacant Space	**Vacant**
Default Status for Assigned Space	**Assigned**
Default Status for Occupied Space	**Occupied**
Default Status for Leased Space	**Leased**
Default Status for Reserved Space	**Reserved**
Allow Reservation	**Yes**
Allow Overbooking	**No overbooking**
Status	**Active**

Portfolio Management

The Portfolio management solution is a flexible, configurable framework for organizing and managing your current and future portfolio structure of real estate properties. The portfolio management capabilities can also be used to provide a flexible solution for planning, organizing, managing, and tracking the performance of your real estate properties in the portfolio against strategic business objectives. Organize your facilities, properties, and buildings by any hierarchy that supports your needs. Whether you organize your properties by geography or by business units and department, or by any other hierarchy. With Primavera Real Estate Management you always have access to dashboards, providing real-time portfolio data at any level in the hierarchy.

With Primavera Real Estate Management, you get a single integrated real estate and facility lifecycle management solution that lets you view, compare, and report on any information for a single property or across your entire real estate portfolio—all in real time. Providing automation, flexibility, and the power to handle customer-specific real estate management needs, Primavera Real Estate Management delivers a Web-based solution with an intuitive graphical interface to real estate professionals.

As a part of Real Estate Management, the Portfolio Management enables you to:

- Model your Real Estate Portfolio, by geography, business units, Organizational Breakdown Structure (OBS), or other models
- Configure a Shell object with Parent/Child relationships
- Roll-up data from a Child hierarchy node to the Parent node
- Access data in a single facility or across the entire real estate portfolio

The Portfolio Management section explains the following topics:

- Space Demand and Capacity
- Capital Expansion
- Assets and Equipment
- Warranty Tracking
- Lease Administration
- Occupancy Rates

In This Section

Portfolio Management User-Defined Reports (UDRs)

The following is a list of the UDRs:

UDRs Name	UDRs Description	UDRs Data Type	UDRs Report Type
Portfolio by Ownership Type	NA	Shell Information	Tabular

Unifier Facilities Management

The Facilities Management component of FAM enables you to:

- Manage your facilities and properties.
- Handle customer-specific facilities management needs.

This component allows you to manage your:

- Asset
- Maintenance
- Space
- Condition Assessment

Use the Facilities Management component to:

- Configure and automate business processes to match corporate workflow.
- Manage a single property/facility or an entire portfolio.
- Gain visibility into material and labor costs associated with corrective and preventive maintenance.
- Manage and track space counts by type, usage, and occupants.
- Consistently collect, analyze, and report on facilities.
- Benefit from support for Building Owners and Managers Association standards or Net Leasable Space calculations.
- View interactive floor plans to manage your space.
- Manage employee space requests and assignments.
- Track and report on employee head counts, space standard compliance, room availability, and so forth.

The key features of the Facilities Management component are:

- Service requests with portal interface
- Work order requests
- Work orders
- Preventive maintenance books
- Job plans
- Meter readings
- Invoices and payments
- Material orders and receipts
- Material moves
- Material adjustments
- Equipment management
- Space management
- Stack Plan diagrams
- Facility inspections and condition assessment
- Templates for fast setup and deployment

- Advanced reporting and dashboards
- Detailed audit log

In This Section

Facilities: Asset Management

Asset management enables you to manage:

- Asset Creation
- Asset Templates
- Assets by Type
- Asset Warranty
- Asset Meters

Note: The list of Asset Management Business Processes (BPs) is provided below.

Asset Creation

The Asset Creator process simplifies and automates the creation of asset records and all related objects. During asset creation process, the user will populate all asset data that are specific to this asset instance, for example, Serial Number, Location, Install date, In-Service Date, Purchase Price, and so forth. All other asset data that are common (with similar type of asset) can be automatically populated by selecting an Asset Template. For more information, see ***Asset Templates***.

After the asset creation is submitted, the actual Asset record is auto-created along with the corresponding preventive maintenance book record (PM BOOK) for the asset (assuming preventive maintenance is required, as well as the Meter Readings record for this asset).

Note: Oracle does not recommend creating new Assets directly from the Assets log menu, as many of the necessary related records will have to be manually created.

Asset Templates

Asset Templates are used to store the common asset data (manufacturer, model number, and so forth) for assets of the same type. It is meant to simplify and ensure consistency among asset of similar types. As outlined in the topic above, Asset Templates are used by the Asset Creator process.

Assets by Type

You can organize assets by type, manufacturer, or other attributes in the Assets Log. By default, assets are grouped in the left Navigator of the log by Type and then by Manufacturer.

> **Note**: The set up is a configurable Advanced Log parameter and can be changed by the administrator in uDesigner.

Asset Warranty

Each asset has data fields to capture warranty information such as:

- Warranty name
- URL Link to the manufacturer web site
- Warranty Details text field
- Warranty number
- Warranty Start Date and End date

Warranty Expire Lead Time is an additional field that enables you to specify the number of days before the warranty expires. The system, then, automatically initiates and sends out an asset facility inspection record. This ensures that an asset inspection is completed before the warranty coverage expires.

Asset Meters

Asset meters are a repositories that capture readings of meters belonging to assets. Asset meters are used to generate work orders when trigger dates or readings are reached (one or multiple Meter Reading records per Asset). Meter reading values can be used as a trigger creation of Work Order in case of meter-based preventive maintenance.

Some assets may have different types of meters and gauges such as:

- Pressure gauge
- Hours of operations meter
- Temperature gauge

If these meters and gauges are used to trigger preventive work orders, each asset may have one or more Asset Meter records. The assets with multiple meters and gauge types will have multiple meters, and each meter record is used to capture meter readings for this type of meter. Based on meter reading thresholds (set up on the Preventive Maintenance Book for the asset), the system will trigger work orders automatically and based on the latest meter reading.

Asset Management Business Processes (BPs)

Asset Management Line Item Type BPs

The following *Line Item type BPs* are available for Asset Management:

BP Name	BP ID	BP Level
Assets	uat	Project/Shell
Assets Creator	uatc	Project/Shell
Asset Templates	uatt	Project/Shell
Meters	umt	Project/Shell

Assets Business Process

Assets BP - Purpose

Assets BP automates the creation of the:

- Asset
- Corresponding PM Book
- Asset Meters, belonging to this asset

Assets BP - Level

Project/Shell

Assets BP - Type

Line Item

Asset BP - Workflow

Asset BP is a non-workflow BP.

Record Statuses

- In_Service
- Installed
- Disposed
- Under_ Maintenance

Assets BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Assets**.

Assets BP - Viewing

To view Assets records:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.

2) In the left Navigator, select **Asset Management**, and then select **Assets**.
3) In the BP log, select the record you want to view and click ⚙ **> Open**.

Assets Creator Business Process

Assets Creator BP - Purpose

The Asset Creator process simplifies and automates the creation of asset records and all related objects. During asset creation process, the user will populate all asset data that are specific to this asset instance, for example, Serial Number, Location, Install date, In-Service Date, Purchase Price, and so forth. All other asset data that are common (similar type of asset) can be automatically populated by selecting an Asset Template (see the next section below).

After the asset creation is submitted, the actual Asset record is auto-created along with the corresponding preventive maintenance book record (PM BOOK) for the asset (assuming preventive maintenance is required, as well as the Meter Readings record for this asset).

Assets Creator BP - Level

Project/Shell

Assets Creator BP - Type

Simple

Record Statuses

Completed

Groups Associated with this BP

Company Administrators and Asset Managers can create assets

Assets Creator BP - Workflow

Assets Creator BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Assets Creator**.

Assets Creator BP - Create

To create Assets BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Asset Management**, and then select **Asset Creator**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) From the **Workflow Actions** menu, select **Create Asset**.

Asset Templates Business Process

Asset Templates BP - Purpose

Asset Templates are used to store the common asset data (manufacturer, model number, and so forth) for assets of the same type. It is meant to simplify and to ensure consistency among asset of similar types. As outlined in the topic above, Asset templates are used by the Asset Creator process.

Asset Templates BP - Level

Project/Shell

Asset Templates BP - Type

Line Item

Record Statuses

- Active
- Inactive

Groups Associated with this BP

Company Administrators and Asset Managers can create and edit assets.

Asset Templates BP - Workflow

Asset Templates BP is a non-workflow BP.

Asset Templates BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Asset Templates**.

Asset Templates BP - Create

To create Asset Templates BP:

1) Navigate to the **All Properties** node and switch to **User** mode.
2) In the left Navigator, select **FAM Templates**, and then select **Asset Templates**.
3) In the BP log, click **Create**.
4) Complete the form.
5) Select the **Gauges & Meters** and **Building Systems** tabs.
   a. Click **Add**.
   b. Enter the required information.
6) Select **Finish Editing** to save the asset template.

Meters Business Process

Meters BP - Purpose

Some assets may have different types of meters and gauges such as:

- Pressure gauge
- Hours of operations meter
- Temperature gauge

If these meters and gauges are used to trigger preventive work orders, each asset may have one or more Asset Meter record. Assets with multiple meters and gauge types will have multiple meters, and each meter record is used to capture meter readings for this type of meter. Based on meter reading thresholds (set up on the Preventive Maintenance Book for the asset), the system will trigger work orders automatically and based on the latest meter reading.

Meters BP - Level

Project/Shell

Meters BP - Type

Line Item

Record Statuses

- Active
- Inactive

Groups Associated with this BP

Asset Managers can create and edit meters.

Meters BP - Workflow

Meters BP is a non-workflow BP.

Meters BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.

3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Meters**.

Meters BP - View

To view Meter records:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Asset Management**, and then select select **Meters**.
3) In the BP log, select the record you want to view and click ⚙ **> Open**.

Asset Management User-Defined Reports (UDRs)

The following is a list of the UDRs:

UDR Name	UDR Description	UDR Data Type	UDR Report Type
Assets Detail Report	Asset Management	Assets	Tabular
Assets Summary Report	Asset Management	Assets	Tabular

Facilities: Maintenance Management

Maintenance management is essential to the smooth operation of any facility, which includes keeping interruptions, system failures, and safety incidents to a minimum.

The many preventive maintenance features in Facilities Management includes best-in-class automated processes for things such as service requests (with a portal interface), preventive and corrective work orders, preventive maintenance books, job plans, meter readings, invoices and payments, material and parts inventory, material orders and receipts, material moves, material adjustments, and more.

The constantly changing state of information is managed through the Unifier workflow engine, which tracks all task assignments. Users can manage these elements through the product interface or via automated e-mails.

Making things even easier, all maintenance work-related costs are rolled-up to a central cost sheet normalized by a robust cost code structure. Here, users can drill down through facility management costs by each transaction for the entire facility or across the portfolio of facilities. All cost structures are easily configurable by an administrator.

Maintenance management enables you to manage:

- Portal Service Requests
- Work Order Requests
- Corrective Work Order

- Preventive Work Order
- Job Plans
- Preventive Maintenance (PM) Books
- Material Stock-Keeping Unit (SKU)
- Material Inventory
- Material Requests
- Materials Received

Note: Information about the Maintenance Management Business Processes (BPs) is provided below.

Portal Service Requests

The Portal Service Request process is an easy-to-use process for submitting facility service requests for issues, problems, requests for repair, and so forth. The Portal Service Request allows you to specify the nature of the issue, priority, criticality, location (site or building) as well As the asset affected if applicable.

The Portal Service Request process is accessible to users from a different URL address than the typical full access URL used to log on to Unifier. Access to this portal Service Request process interface is available to all FAM users who are members of the “Portal Users” company level User Group.

Work Order Requests

After a Service Request is submitted from the portal interface (see above), a Work Order Request is automatically generated in the Facilities Help Desk node, which is located in the Company Workspace tab.

Members of the Help Desk group can review the Work Order Requests generated from the Service Requests and approve or reject. Once approved, a Corrective Work Order gets autogenerated in the appropriate location, based on the service request data.

Corrective Work Order

Corrective Work Orders are typically autogenerated from the approved Work Order Requests, as explained in the above topic. A corrective work order is created in the appropriate shell location (Site-level or Building-level) and contains all the relevant information regarding the issue, the asset, and the location, and a full description of the problem copied from the service request.

Preventive Work Order

Preventive Work Order get generated automatically from the Preventive Maintenance Book record for each asset. Preventive Work Orders can be generated based on one of the following trigger events:

- Scheduled Event (time-based)

- Gauge-triggered
- Meter-triggered

The settings for each trigger type are set up on the Preventive Maintenance Book (PM Book) record for each asset. For details about the logic behind creating the PWO, see ***Preventive Maintenance (PM) Books***.

Job Plans

Job Plans are considered templates for the list of labor and tasks, materials, and tools required to complete a specific type of maintenance work. The following is a list of some of the information that is stored in each Job Plan:

- Types of labor
- Estimated time to complete each task
- Sequence of tasks
- List of materials
- Estimated quantities

When setting up the PM Book activities (time-based, meter-based, or Gauge-based), a Job Plan can be selected and associated with each PWO activity.

When PWO are autogenerated, the information is carried over from each job plan and included in the PWO work order, to guide the technician performing the work. The following is a list of some of the information:

- List of required labor and tasks
- Estimated time to complete each task
- List of material and estimated quantity

Preventive Maintenance (PM) Books

PM Books hold details on specific maintenance activities such as when and how preventive work orders get triggered.

Preventive Work Orders are generated automatically from the PM Books. Triggering the PWOs can be controlled by one of the following types of trigger events:

- Scheduled Events (time-based)
- Gauge-triggered
- Meter-triggered

Settings for each trigger type are set up on the PM Book record for each asset. In addition, PWO creation from Scheduled Events can also be further controlled by selecting “Seasonal Dates” exceptions, for example, Create a PWO every month, except for the months of June, July, and August.

Material Stock-Keeping Unit (SKU)

The Material SKU Master process acts as the library of all stocked and non-stocked material used for material inventory and maintenance management. The Material SKU Master provides the details for each type of material/part, manufacturer name, model number, specifications, and images as well as a list of Vendors who can be used to purchase such material from.

Material Inventory

Material Inventory Management provides the ability to maintain a list of materials at a particular location/warehouse. It dynamically updates the quantity in inventory and average unit cost for each material SKU in inventory. Material Inventory gets updated dynamically when new material is purchased and received, material is consumed/issued for work orders and when manual inventory adjustments are made.

Material Requests

Material Requests is a process typically used by technicians during work order execution when they need to request additional material from a specific warehouse. When requested and submitted by the technician, a material request is assigned to the Warehouse Managers user group with a list of requested material SKUs and quantities. When fulfilled by the warehouse personnel, the technician is notified and the work order gets updated with the issued material quantity.

Materials Received

Material Received process is used to confirm the delivery and receipt of materials that have been ordered from a vendor by a Purchase Order (PO). The material Received record is matched with the corresponding PO and requested SKU and quantities are compared to the SKUs and quantities received,

After the material received is approved, the Material Inventory quantities and average unit price get updated dynamically.

Maintenance Management Business Processes (BPs)

Maintenance Management Line Item Type BPs

The following *Line Item type BPs* are available for Maintenance Management:

BP Name	BP ID	BP Level
Corrective Work Orders (CWO)	ucwof	Project/Shell
Material Requests for CWO	umr1	Project/Shell

BP Name	BP ID	BP Level
Preventive Work Orders (PWO)	upwo	Project/Shell
Material Requests for PWO	umrpwo	Project/Shell
Job Plans	ujpn	Project/Shell
Material SKUs Master	uskum	Project/Shell
PM Book Templates **Note**: PM stands for Preventive Maintenance.	upmbt	Project/Shell
PM Books **Note**: PM stands for Preventive Maintenance.	uapmb	Project/Shell

Maintenance Management Simple Type BPs

The following *Simple type BPs* are available for Maintenance Management:

BP Name	BP ID	BP Level
Service Requests	usrfm	Company
Work Order Requests	uworc	Company

Corrective Work Orders (CWO) Business Process

Corrective Work Orders (CWO) BP - Purpose

CWOs are created either automatically (as a result of a Service Request) or manually (by a technician or a supervisor). The purpose of a CWO is to communicate with and assign a task to a technician to perform corrective maintenance work related to a site, facility/building, or asset.

The CWO contains all the necessary data to communicate the issue to be resolved, the location, the asset and its details and the description of the issue/problem. CWOs are routed to the different parties involved via a default (yet configurable) business process workflow as shown below. Assigned technicians are required to complete the list of tasks performed, actual time spent on each task, list of materials used and quantities and any tool used to complete the tasks.

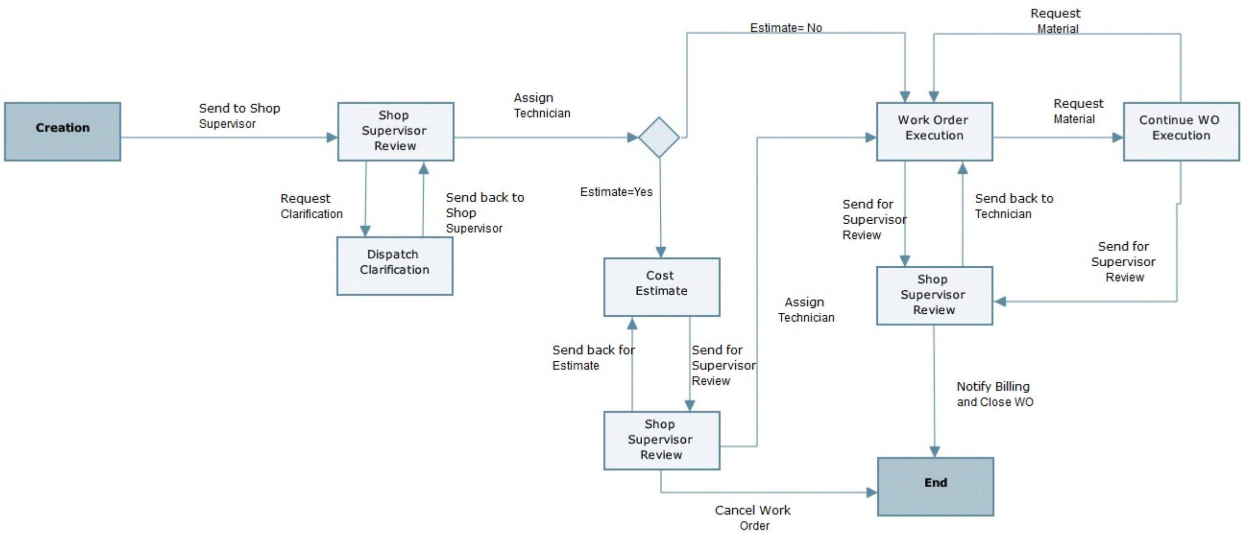
Corrective Work Orders (CWO) BP - Level

Project/Shell

Corrective Work Orders (CWO) BP - Type

Line Item

Corrective Work Orders (CWO) BP - Workflow



Corrective Work Orders (CWO) BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Corrective Work Orders**.

Corrective Work Orders (CWO) BP - View

To create Corrective Work Orders BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Maintenance Management**, and then select **Corrective Work Orders**.
3) In the BP log, select the record you want to view and click ⚙ **> Open**.

Material Requests for CWO Business Process

Material Requests for CWO BP - Purpose

Material Requests is a process typically used by technicians during work order execution when they need to request additional material from a specific warehouse.

Material Requests for CWO BP - Level

Project/Shell

Material Requests for CWO BP - Type

Line Item

Material Requests for CWO BP - Workflow

Material Requests for CWO BP is a non-workflow BP.

Material Requests for CWO BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Material Requests for CWO**.

Material Requests for CWO BP - View

To view Material Requests for CWO BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Material Management**, and then select **Material Requests for CWO**.
3) In the BP log, select the record you want to view and click **> Open**.

Preventive Work Orders (PWO) Business Process

Preventive Work Orders (PWO) BP - Purpose

PWOs are created automatically from the PM Book records for a particular asset. The purpose of a PWO is to communicate with and assign a task to a technician to perform preventive maintenance work typically related to an asset. The PWO contains all the necessary data to perform the preventive work order, including the asset name, type, and location, as well as the list of tasks with instructions, materials and tools.

PWOs are typically assigned directly to a group of technicians who is responsible for performing specific type of preventive maintenance. Assigned technicians are required to complete the list of tasks performed, actual time spent on each task, list of materials used and quantities and any tool used to complete the tasks.

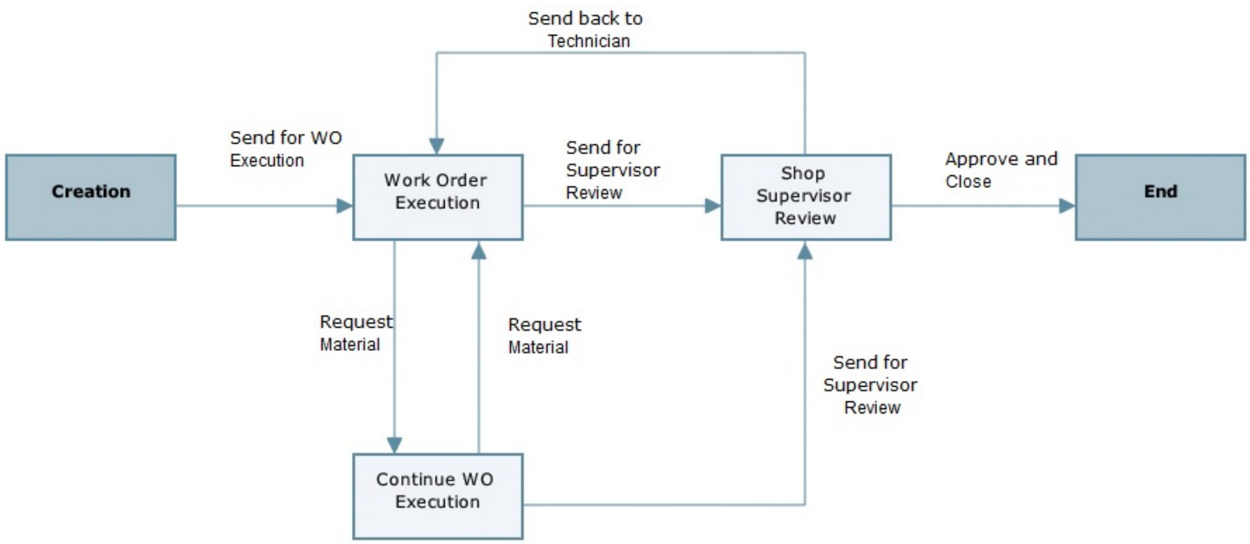
Preventive Work Orders (PWO) BP - Level

Project/Shell

Preventive Work Orders (PWO) BP - Type

Line Item

Preventive Work Orders (PWO) BP - Workflow



Preventive Work Orders (PWO) BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select P**reventive Work Orders**.

Preventive Work Orders (PWO) BP - View

To view Preventive Work Orders (PWO) BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Maintenance Management**, and then select **Preventive Work Orders**.
3) In the BP log, select the record you want to view and click ⚙ **> Open**.

Material Requests for PWO Business Process

Material Requests for PWO BP - Purpose

Material Requests is a process typically used by technicians during work order execution when they need to request additional material from a specific warehouse.

Material Requests for PWO BP - Level

Project/Shell

Material Requests for PWO BP - Type

Line Item

Material Requests for PWO BP - Workflow

Material Requests for PWO BP is a non-workflow BP.

Material Requests for PWO BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Material Requests for PWO**.

Material Requests for PWO BP - View

To view Material Requests for PWO BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Material Management**, and then select **Material Requests for PWO**.
3) In the BP log, select the record you want to view and click **> Open**.

Job Plans Business Process

Job Plans BP - Purpose

Job Plans are considered templates for the list of Labor and Tasks, materials and Tools required to complete a specific type of maintenance work.

Job Plans BP - Workflow

Job Plans BP is a non-workflow BP.

Job Plans BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.

4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Job Plans**.

Job Plans BP - Create

To create job plans:

1) Navigate to the **All Properties** node and switch to **User** mode.
2) In the left Navigator, select **FAM Templates**, and then select **Job Plans**.
3) In the BP log, click **Create**.
4) Select the **Tasks & Labor**, **Material**, and **Tools** tabs.
   a. Click **Add**.
   b. Enter the required information.
5) Select **Finish Editing** to save the job plans.

Material SKUs Master Business Process

Material SKUs Master BP - Purpose

The Material SKU Master process acts as the library of all stocked and non-stocked material used for material inventory and maintenance management.

Material SKUs Master BP - Level

Project/Shell

Material SKUs Master BP - Type

Line Item

Material SKUs Master BP - Workflow

Material SKUs Master BP is a non-workflow BP.

Material SKUs Master BP - View

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.
2) In the left Navigator, select **FAM Master Logs**, select **Material Management**, and then select **Material SKUs Master**.

Or

Navigate to the Shell and view the BP from the Shell Log.

Material SKUs Master BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.

4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Material SKUs Master**.

PM Book Templates Business Process

PM Book Templates BP - Level

Project/Shell

PM Book Templates BP - Type

Line Item

PM Book Templates BP - Workflow

PM Book Templates BP is a non-workflow BP.

PM Book Templates BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **PM Book Templates**.

PM Book Templates BP - Create

To create PM Book templates:

1) Navigate to the **All Properties** node and switch to **User** mode.
2) In the left Navigator, select **FAM Templates**, and then select **PM Book Templates**.
3) In the BP log, click **Create**.
   Complete the form.
4) Select the **Scheduled PM**, **Gauge Triggered**, and **Meter Triggered** tabs.
   a. Click **Add**.
   b. Enter the required information.
5) Select **Finish Editing** to save the job plans.

PM Books Business Process

PM Books BP - Purpose

PM Books hold details on specific maintenance activities such as when and how preventive work orders get triggered.

PM Books BP - Level

Project/Shell

PM Books BP - Type

Line Item

PM Books BP - Workflow

PM Books BP is a non-workflow BP.

PM Books BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **PM Books**.

PM Books BP -View

To view a PM Books BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Maintenance Management**, and then select **PM Books**.
3) In the BP log, select the record you want to view and click ⚙ **> Open**.

Service Requests Business Process

Service Requests BP - Purpose

The Portal Service Request process is an easy-to-use process for submitting facility service requests for issues, problems, requests for repair, and so forth.

Service Requests BP - Level

Company

Service Requests BP - Type

Simple

Service Requests BP - Workflow

Service Requests BP is a non-workflow BP.

Service Requests BP - View

The Portal Service Request process is accessible to users from a different URL address than the typical full access URL used to log on to Unifier. Access to this portal Service Request process interface is available to all FAM users who are members of the “Portal Users” company level User Group.

Service Requests BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Service Requests**.

Service Requests BP - Create

To create a space request:

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Facilities Help Desk**, and then select **Space Requests**.
3) In the BP log, click **Create**.
4) Complete the form.
5) Click **Submit**.

Work Order Requests Business Process

Work Order Requests BP - Purpose

A Work Order Request is automatically generated in the Company Workspace after a Service Request is submitted from the portal interface.

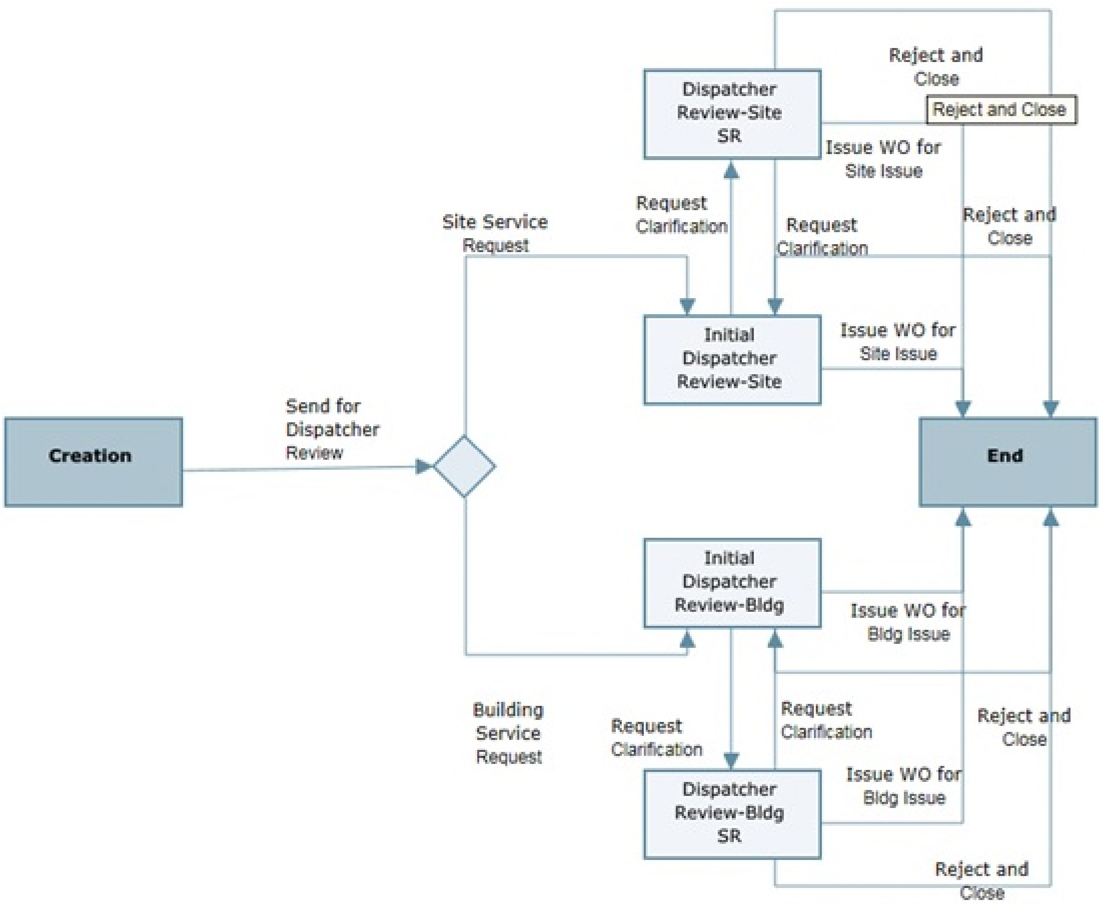
Work Order Requests BP - Lev

Company

Work Order Requests BP - Type

Simple

Work Order Requests BP - Workflow



Work Order Requests BP - View

Go to the Company Workspace; in the left Navigator, select Facilities Help Desk node.

Or

Navigate to the Shell and view the BP from the Shell Log.

Work Order Requests BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Work Order Requests**.

Work Order Requests BP - Routing

To route a Work Order Request:

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Tasks**.
3) From the **Tasks** log:
   - Select the task you want to work with, click ⚙ , and select **Open**. You can also double-click a task to open it.

     The view-only form displays all fields on the record.
   - The Upper Form contains project information, including the record number and title.
   - The Task Details section displays who sent the record, who can act on the record, who was copied on the record, the step to which the record was sent, the task due date, the task status, and in Classic View, any task notes.
4) Review the record.
5) If you need clarification, enter your comments to the service requester.
6) From the **Workflow Actions** drop-down menu, select from one of the following actions:
   - **Issue Work Order for Site Issue** or **Issue Work Order for Building Issue:** A Corrective Work Order record is auto created for the specified site or building
   - **Reject and Close:** The record is closed.
   - **Request Clarification:** The record is sent to the initial service requester for more information.
7) Click **Send**.

Maintenance Management User-Defined Reports (UDRs)

The following is a list of the UDRs:

UDR Name	UDR Description	UDR Data Type	UDR Report Type
Corrective Work Order Detail	NA	Corrective Work Orders	Tabular
Corrective Work Order Summary	NA	Corrective Work Orders	Tabular
Facility Conditions Report	Facility Condition Assessment	FCA Manager-FCA Manager	Tabular
Facility Inspections	Facility Condition Assessment	Facility Inspections	Tabular
Materials Received Report	Material Management	Materials Received	Tabular
Material Requests for PWO	Material Management	Material Requests for PWO	Tabular
Material Requests for CWO	Material Management	Material Requests for CWO	Tabular

UDR Name	UDR Description	UDR Data Type	UDR Report Type
Preventive Work Order Details	NA	Preventive Work Orders	Tabular
Preventive Work Order Summary	NA	Corrective Work Orders	Tabular

Facilities: Space Management

Whether moving a single person or re-stacking entire buildings, Unifier space- and move-management solutions facilitate not only strategic planning and tactical re-assignment of space but also the move process itself (including all associated tasks, dates, and assignments). The Space Manager feature provides a flexible and configurable solution to create, classify, and organize building floors and spaces by types such as usable spaces, common spaces, vertical penetrations, gross exterior measured areas, and so on.

Each space type definition has a configurable set of attributes for capturing critical data such as occupant's name and department, measured and/or extracted space area, space type and usage, and more. Users can also employ the Space Manager feature to track space standard compliances and room availability and to compute occupancy rates.

In addition, the configurable Stacking Plans capability provides a visual representation of an entire facility or building, broken down by floor or level, to show how spa a single department on a given floor, and more. The Space Manager feature also supports the Building Owners and Managers Association standards for space classification

Space management enables you to manage:

- Space Planning Classifications
- Stacking Plans
- Space Requests & Assignments
- Move Management
- Room Reservations
- Space Management Business Processes

> **Note**: Information about the Space Management Business Processes (BPs) is provided below.

Space Planning Classifications

The Space Planning contains the following predefined Space types:

- Usable Spaces

This space type is used to measure the actual occupiable area of a floor or an office suite and is of prime interest to a tenant in evaluating the space offered by a landlord and in allocating the space required to house personnel and furniture.

- Leasable Spaces

  This type is used to measures the tenant's pro-rata portion of the entire office floor, excluding elements of the building that penetrate through the floor to areas below. This space type is associated with the Lease business process.

- Common Areas

  This space type is used to measure the spaces that are shared by all tenants. Examples of Common Area include the main building lobby, secondary lobbies and egress corridors, building mechanical and electrical rooms, fire control center, and similar areas.

- Major Vertical Penetrations
- Gross Measured Areas
- Gross Building Areas

Stacking Plans

A stacking plan is a two-dimensional chart created to display the arrangement and use of spaces on floors in a high-rise office building or condominiums. They are usually shaded or color-coded based on things like occupancy status (vacant/occupied), departments/companies occupying the floor, and so on. As a default, the solution comes with three preconfigured stacking plans:

- Vacancy Stack Plan
- Occupancy by Dept.
- Leasable Spaces by Type

Space Requests & Assignments

Users can use the Space Request process for the portal interface to request a space assignment.

Space Requests can include the desired space type, size, location, building, and so forth. Once submitted, as Space Assignment request get autogenerated in the requested location/shell. Once reviewed, a space can them be assigned to the requester.

Move Management

Move Requests can be submitted by users from the portal interface. The move requests includes the current employee's location, building, space number, and so forth, and the desired location information. Submitting a Move Request autogenerates a Move Work Order in the desired “move to” location shell. After a Move Work Order is approved, the employee's record is updated with the new location and the assigned space gets updated with the employee's information.

Room Reservations

Room Reservations is a business process to facilitate the ability to reserve a usable space, provided that the space is marked as available for reservation. The process provides the user with date and time fields for the requested space and a calendar-like interface show spaces that are available within the specified date/time range. Once approved, the reserved space's calendar shows that time block as “reserved”.

Space Management Business Processes (BPs)

Space Management Cost Type BPs

The following *Cost type BPs* are available for Space Management:

BP Name	BP ID	BP Level
Room Reservation	urr	Project/Shell

Space Management Simple Type BPs

The following *Simple type BPs* are available for Space Management:

BP Name	BP ID	BP Level
Space Assignments	uspa	Project/Shell
Space Occupancy Statuses	uspoc	Project/Shell & All Properties
Space Requests	usrp	Company

Room Reservation Business Process

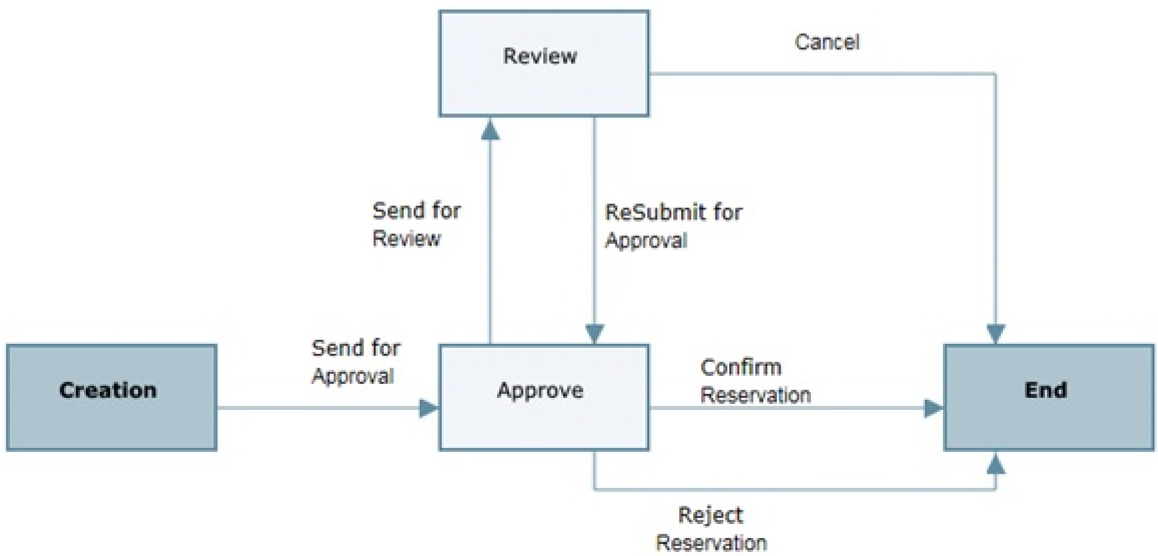
Room Reservation BP - Purpose

Room Reservations is a business process to facilitate the ability to reserve a usable space, provided that the space is marked as available for reservation.

Room Reservation BP - Type

Line Item (with Multiple Codes and sub classification Reservation)

Room Reservation BP - Workflow



Room Reservation BP - View

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.
2) In the left Navigator, select **FAM Master Logs**, select **Facilities Management**, and then select **Room Reservations**.

Or

Navigate to the Shell and view the BP from the Shell Log.

Room Reservation BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Room Reservation**.

Space Assignments Business Process

Space Assignments BP - Purpose

To use the Space Request process for the portal interface to request a space assignment.

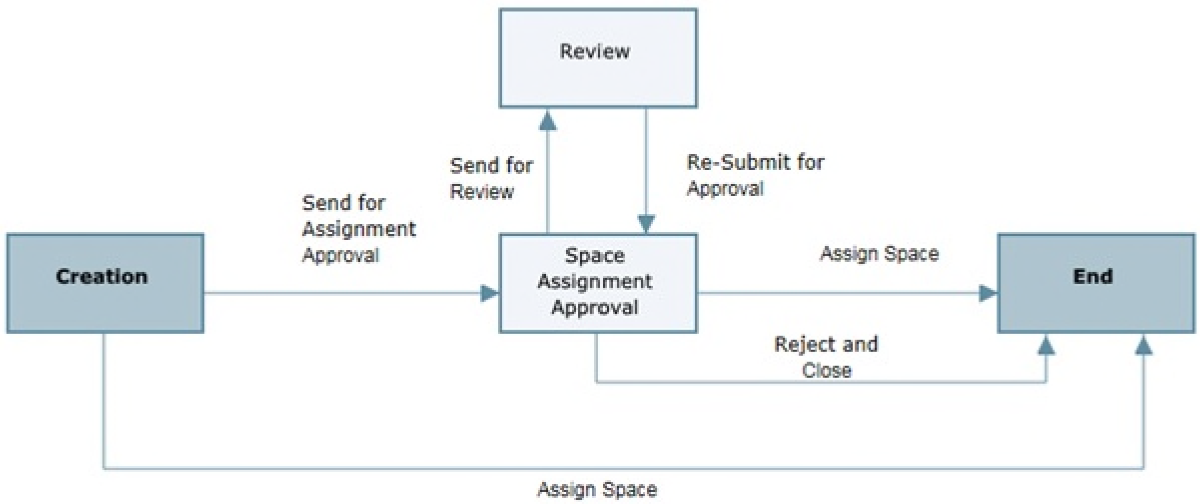
Space Assignments BP - Level

Shell

Space Assignments BP - Type

Simple

Space Assignments BP - Workflow



Record Statuses

- Pending
- Assigned
- Rejected

Groups Associated with this BP

Creation, Space Assignment Approval, and Review steps: Accommodation Managers, Building Managers, Property Managers, Real Estate Managers, and Space Planners

Space Assignments BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Space Assignments**.

Space Assignments BP

To work with a Space Assignments BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Space Management**, and then select **Space Assignments**.

3) Select the space assignment BP record to open.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) From the **Workflow Actions** menu, select **Send for Assignment Approval**.

Space Occupancy Statuses Business Process

Space Occupancy Statuses BP - Purpose

To set some default values for the Space Occupancy statuses. These default statuses are used in auto-population (AP) and reverse auto-populations (RAP). This is part of the system setup and not meant for end users.

Space Occupancy Statuses BP - Level

Shell

Note: Enabled at the All Properties Shell.

Space Occupancy Statuses BP - Type

Simple

Space Occupancy Statuses BP - Workflow

Space Occupancy Statuses BP is a non-workflow BP.

Space Occupancy Statuses BP - View

Go to the All Properties Shell, select Information, and then select General.

Space Requests Business Process

Space Requests BP - Purpose

To use the portal interface to request a space assignment.

Space Requests BP - Level

Shell

Space Requests BP - Type

Simple

Space Requests BP - View

To create a space request:

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Facilities Help Desk**, and then select **Space Requests**.

3) In the BP log, click **Create**.
4) Complete the form.
5) Click **Submit**.

Space Management User-Defined Reports (UDRs)

The following is a list of the UDRs:

UDR Name	UDR Description	UDR Data Type	UDR Report Type
Space Rollup Summary	Space Rollup Summary	Usable Space	Tabular

Space Management Custom Reports

The following is a list of Custom Reports:

Custom Report Name	Location
Space Requests and Assignments	Buildings (Shell)
Space Requests and Space Assignments	All Properties (Shell)

Facilities: Condition Assessment Management

Assessing facility condition is an important part of management and maintenance. This task includes inspecting, collecting, analyzing, and reporting on the condition of the entire facility or each building system (for example, foundation, roof construction, exterior enclosure, elevators and lifts, plumbing, HVAC, and more). Such assessments are primarily used to support decision-makers in their annual budgeting and maintenance project planning.

Condition Assessment management enables you to manage:

- Facility Inspections
- UNIFORMAT II System Codes
- Facility Condition Index (FCI) Index

- Facility Condition Manager

> **Note**: Information about the Condition Assessment Management Business Processes (BPs) is provided below.

Facility Inspections

Facility condition assessment is an industry term that describes the process of a qualified group of trained industry professionals performing an inspection and analysis of the condition of a facility or group of facilities that may vary in terms of age, design, construction methods, and materials.

The purpose of these inspections is to collect data related to the various building systems and assets and capture the condition, deficiency, required deferred maintenance costs and estimated replacement costs. All this data is then used to analyze and calculate the overall FCI, facility condition index.

The facility inspection process provides the technician/inspectors the ability to capture this data and tag each inspection against a Building Systems Code, using the Uniformat II standard code structure.

UNIFORMAT II System Codes

The solution is delivered with templates of the Uniformat II code structure as part of the Facility Condition Manager setup.

Facility Condition Index (FCI)

FCI is the industry standard, method, or formula that is used in facilities management to enable the owner to compare the conditions of a group of facilities. The resulting information can be used for determining the course of action regarding facilities repair, maintenance, assets, systems, and so forth.

Facility Condition Manager

The Facility Condition Manager analyzes the data attained from facilities inspection and calculates the FCI for each facility individually, or for all facilities together.

Condition Assessment Business Processes (BPs)

Condition Assessment Line Item Type BPs

The following *Line Item type BPs* are available for Condition Assessment Management:

BP Name	BP ID	BP Level
Facility Inspections	ufi	Project/Shell

Facility Inspections Business Process

Facility Inspections BP - Purpose

To collect data related to the various building systems and assets and capture the condition, deficiency, required deferred maintenance costs and estimated replacement costs.

Facility Inspections BP - Level

Project/Shell

Facility Inspections BP - Type

Line Item

Facility Inspections BP - Workflow

Facility Inspections BP is a non-workflow BP.

Record Statuses

- Current
- Archived

Groups Associated with this BP

Building Maintenance Managers, Facility Inspectors, Facility Managers, Maintenance Management Services, and FAM Administrators can create and edit this BP.

Facility Inspections BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Facility Inspections**.

Facility Inspections BP - Create

To create Facility Inspections BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Facility Conditional Assessment**, and then select **Facility Inspections**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

Unifier Real Estate Management

The Real Estate Management component of FAM enables you to plan, manage, and track your real estate portfolio, which includes leased and owned properties. This component allows you to manage your:

- Leases
- Transactions
- Real Estate Data
- Utilities and Energy Consumption

Use the Real Estate Management component to:

- Configure and automate Business Processes to match corporate workflow.
- Manage a single property/facility or an entire portfolio.
- Gain visibility into all real estate information across the entire portfolio.
- Track strategic transactions such as site/property acquisitions, dispositions, lease renewals, and more.
- Manage market transaction types such as acquisitions, construction, dispositions, and financing.
- Manage portfolio locations by region, property, site, or any other structure.

The key features of the Real Estate Management component are:

- Comprehensive tracking and analysis of leased and owned properties
- Management and tracking of landlord and tenant leases
- Support for expense and capital leases
- Automated lease payment requests and lease billing/invoicing and tracking
- Expense allocation by department, or multiple payees
- Automated notifications and alerts on critical lease dates
- Site selection, acquisition, and disposal transaction management
- Visibility into occupancy levels and demand forecasts across portfolio
- Critical date management with automated reminders
- Online approvals based on configured business rules
- Drill-down capabilities, graphical dashboards, and Key Performance Indicator (KPI) charting
- Analytics based on occupancy levels and demand forecasts

In This Section

Real Estate: Leases Management

Unifier Real Estate Management offers a comprehensive set of flexible and configurable lease management capabilities. In addition to supporting both tenant and landlord lease types, the application addresses lease payment terms, contacts, key dates, clauses, tenant improvement allowances, security deposits, and more. It also supports the automatic creation and routing of lease payments, lease invoices, and dynamic task assignments with notifications. Users can track costs and expenses, associate lease payments with designated cost codes, and roll them up to the facility's cost worksheet. In addition, lease payments and invoices can be allocated to different parties, departments, and so on. And whether the payments are an expense (tenant lease) or income (landlord lease), the system allows you to track these amounts separately.

Unifier Real Estate Management also provides the information required to track critical lease information for reporting against federal guidelines and regulations including future obligation statements and deferred rent liabilities. And like all Unifier products, Real Estate Management uses predefined processes with common elements and basic workflows; however, users can also configure it to accommodate their own practices and processes.

Lease management enables you to manage:

- New Lease Requests
- Leases
- Lease Contacts
- Common Area Maintenance (CAM) Reconciliation
- Lease Actions
- Lease Amendment Requirements
- Lease Invoices
- Lease Payments
- Lease Termination
- Lease Management

New Lease Requests

The New Lease Request process is used to initiate the creation of a new lease agreement/contract. The reason for using a lease request is to allow for the lease terms to be routed for review and approval before the actual lease agreement gets created and activated. The Lease request has all the data that will be used to create the actual lease agreement including the general terms, conditions, dates, clauses, payments, security deposit information, and so forth.

Leases

A lease agreement record is the master record that captures all data related to executing and managing a lease. It supports both the Tenant (Lessee) and the Landlord (Lessor) lease types. Leases can be a Primary Lease or a Sub-lease.

Lease records maintain all the data that related to a commercial lease including, but limited to the following:

- General Lease information such as lease name, number, type, classification, execution date, and so on.
- Landlord and Tenant Information such as names, contact information, addresses, and so on.
- Leased Space Information such as Space Name, location, Area/Size, and so on.
- Key Lease Terms such as Term Periods, Commencement and Expiration dates, Monthly and Annual Rent, Extension Options, and so on.
- Security Deposit Information such as Deposit Amount paid, date, Refund, refund date, and so on.
- Capital or Operating Lease data to support the classification of the lease as Capital or Expense lease, per the new FASB13 guidelines.

In addition, each lease provides the payment setup parameters related to the recurring or one-time payments for payment types such as Base Rent, CAM, Utilities, Insurance, and so forth.

The lease process also supports the ability to specify different payment frequencies, Payment Proration methods, Payment Due Dates, Straight Line provisions, Payment Escalation methods and amounts, and so forth.

The lease process automates the monthly billing process through an automated system generated Payment Requests or Lease Invoices.

Lease Key Dates are also supported with the ability to automate action items and assignments on critical events such as Lease renewals, Option Exercise Dates, and so forth.

Lease Contacts

Lease Contacts is a process to maintain names and contact information for Landlords and Tenants.

Common Area Maintenance (CAM) Reconciliation

The CAM Reconciliation process is used at the end of certain periods (typically annually or semi-annually) to reconcile the amount of payments made towards CAM with the actual CAM obligations.

For Landlords, it serves as a way to figure out if tenants still owe any additional CAM charges or not. For Tenants, it serves to validate that any additional CAM invoices are valid compared to what has been paid for that period.

The CAM reconciliation process autogenerates a Lease Invoice process for any variance between the actual CAM charges and the amount already paid for a defined period of time. In this case, it supports the Landlord use case invoicing the tenants.

Lease Actions

Lease Actions are BP records autogenerated from the Lease record for certain Critical Dates that require an action/task and follow up from someone assigned this action.

Lease Amendment Requirements

Lease Amendment Requests are used to request a modification to an existing Lease and has significant impact on the overall terms or payments of the lease to justify amending the original lease record.

Lease Amendment Requested are initiated from within the original lease record. Once initiated, a Lease Mended Request record gets autogenerated and is routed for review and approval. Once approved, the process does two things:

- The original lease record status changes to “Amended”
- A New Lease record gets created with the new amended/modified data.

The newly created lease record is marked as Active and the Amendment Number field is updated. Mind you that the Primary Lease Number remains the same in spite of a new lease record number.

Lease Invoices

Lease Invoices are autogenerated from the lease record of type Landlord. They are typically invoices sent out to tenants for payment of Rent, Utilities, CAM, Insurance, or other types of charges. The lease invoice record has a reference to the lease record that generated it and line items are automatically populated with the relevant charge type and amount. Lease Invoices are then routed for review and approval.

Lease Payments

Lease Payments are autogenerated from the lease record of type Tenant. They are typically payment requests sent out to lease administration groups at the tenant's organization who are responsible for processing lease payments to landlords. Lease Payment requests can be for Rent, Utilities, CAM, Insurance, or other types of charges.

The Lease Payment record has a reference to the lease record that generated it, and line items are automatically populated with the relevant charge type and amount. Lease Payments are then routed for review and approval.

Lease BP Payment Schedule

Changes to Lease Payment Terms will be always applied on future payment schedules, starting from the first payment of the next term, depending on the term type and length. The change in escalation rate or value can happen in two ways:

- Line Item: Change the escalation value or switch the Index Rate picker record on the line item.
- Index Rate BP: Change the rate value on the source Index Rate BP record in the Company workspace.

The following shows an example:

Lease (Payment Setup) Details

Field	Example
Start date	03/01/2021
End date	02/01/2027
Payment Frequency	Monthly
Initial Amount	$1,000.00
Payment Due Day	1
Latest Payment Due Day	1
Payment Notice Lead Time	10
Escalation Method	Index Rate
Escalation Frequency Term Type	Yearly
Escalation Frequency Term Length	1

Lease Payment Schedule

Start Date	End Date	Due Date	Payment Type	Amount (with initial Index Rate 10)	Amount (with new Index Rate 20, switched on 27th Nov, 2023)	Yearly escalation
03/01/2021	**03/31/2021**	**03/01/2021**	**GTO**	**$1,000.00**	**$1,000.00**	**Start of Lease**
04/01/2021	04/30/2021	04/01/2021	GTO	$1,000.00	$1,000.00	
05/01/2021	05/31/2021	05/01/2021	GTO	$1,000.00	$1,000.00	
06/01/2021	06/30/2021	06/01/2021	GTO	$1,000.00	$1,000.00	
07/01/2021	07/31/2021	07/01/2021	GTO	$1,000.00	$1,000.00	
08/01/2021	08/31/2021	08/01/2021	GTO	$1,000.00	$1,000.00	
09/01/2021	09/30/2021	09/01/2021	GTO	$1,000.00	$1,000.00	
10/01/2021	10/31/2021	10/01/2021	GTO	$1,000.00	$1,000.00	
11/01/2021	11/30/2021	11/01/2021	GTO	$1,000.00	$1,000.00	
12/01/2021	12/31/2021	12/01/2021	GTO	$1,000.00	$1,000.00	
01/01/2022	01/31/2022	01/01/2022	GTO	$1,000.00	$1,000.00	
02/01/2022	02/28/2022	02/01/2022	GTO	$1,000.00	$1,000.00	
03/01/2022	**03/31/2022**	**03/01/2022**	**GTO**	**$1,100.00**	**$1,100.00**	**First year escalation**

Start Date	**End Date**	**Due Date**	**Payment Type**	**Amount (with initial Index Rate 10)**	**Amount (with new Index Rate 20, switched on 27th Nov, 2023)**	**Yearly escalation**
04/01/2022	04/30/2022	04/01/2022	GTO	$1,100.00	$1,100.00	
05/01/2022	05/31/2022	05/01/2022	GTO	$1,100.00	$1,100.00	
06/01/2022	06/30/2022	06/01/2022	GTO	$1,100.00	$1,100.00	
07/01/2022	07/31/2022	07/01/2022	GTO	$1,100.00	$1,100.00	
08/01/2022	08/31/2022	08/01/2022	GTO	$1,100.00	$1,100.00	
09/01/2022	09/30/2022	09/01/2022	GTO	$1,100.00	$1,100.00	
10/01/2022	10/31/2022	10/01/2022	GTO	$1,100.00	$1,100.00	
11/01/2022	11/30/2022	11/01/2022	GTO	$1,100.00	$1,100.00	
12/01/2022	12/31/2022	12/01/2022	GTO	$1,100.00	$1,100.00	
01/01/2023	01/31/2023	01/01/2023	GTO	$1,100.00	$1,100.00	
02/01/2023	02/28/2023	02/01/2023	GTO	$1,100.00	$1,100.00	
03/01/2023	**03/31/2023**	**03/01/2023**	**GTO**	**$1,210.00**	**$1,210.00**	**Second year escalation**
04/01/2023	04/30/2023	04/01/2023	GTO	$1,210.00	$1,210.00	
05/01/2023	05/31/2023	05/01/2023	GTO	$1,210.00	$1,210.00	
06/01/2023	06/30/2023	06/01/2023	GTO	$1,210.00	$1,210.00	
07/01/2023	07/31/2023	07/01/2023	GTO	$1,210.00	$1,210.00	
08/01/2023	08/31/2023	08/01/2023	GTO	$1,210.00	$1,210.00	
09/01/2023	09/30/2023	09/01/2023	GTO	$1,210.00	$1,210.00	
10/01/2023	10/31/2023	10/01/2023	GTO	$1,210.00	$1,210.00	
11/01/2023	**11/30/2023**	**11/01/2023**	**GTO**	**$1,210.00**	**$1,210.00**	*Index Rate switched or rate changed (27 November 2023)*
12/01/2023	12/31/2023	12/01/2023	GTO	$1,210.00	$1,210.00	
01/01/2024	01/31/2024	01/01/2024	GTO	$1,210.00	$1,210.00	

Start Date	End Date	Due Date	Payment Type	Amount (with initial Index Rate 10)	Amount (with new Index Rate 20, switched on 27th Nov, 2023)	Yearly escalation
02/01/2024	02/29/2024	02/01/2024	GTO	$1,210.00	$1,210.00	
03/01/2024	**03/31/2024**	**03/01/2024**	**GTO**	**$1,331.00**	**$1,452.00**	**Third year escalation**
04/01/2024	04/30/2024	04/01/2024	GTO	$1,331.00	$1,452.00	
05/01/2024	05/31/2024	05/01/2024	GTO	$1,331.00	$1,452.00	
06/01/2024	06/30/2024	06/01/2024	GTO	$1,331.00	$1,452.00	
07/01/2024	07/31/2024	07/01/2024	GTO	$1,331.00	$1,452.00	
08/01/2024	08/31/2024	08/01/2024	GTO	$1,331.00	$1,452.00	
09/01/2024	09/30/2024	09/01/2024	GTO	$1,331.00	$1,452.00	
10/01/2024	10/31/2024	10/01/2024	GTO	$1,331.00	$1,452.00	
11/01/2024	11/30/2024	11/01/2024	GTO	$1,331.00	$1,452.00	
12/01/2024	12/31/2024	12/01/2024	GTO	$1,331.00	$1,452.00	
01/01/2025	01/31/2025	01/01/2025	GTO	$1,331.00	$1,452.00	
02/01/2025	02/28/2025	02/01/2025	GTO	$1,331.00	$1,452.00	
03/01/2025	**03/31/2025**	**03/01/2025**	**GTO**	**$1,464.10**	**$1,742.40**	**Fourth year escalation**
04/01/2025	04/30/2025	04/01/2025	GTO	$1,464.10	$1,742.40	
05/01/2025	05/31/2025	05/01/2025	GTO	$1,464.10	$1,742.40	
06/01/2025	06/30/2025	06/01/2025	GTO	$1,464.10	$1,742.40	
07/01/2025	07/31/2025	07/01/2025	GTO	$1,464.10	$1,742.40	
08/01/2025	08/31/2025	08/01/2025	GTO	$1,464.10	$1,742.40	
09/01/2025	09/30/2025	09/01/2025	GTO	$1,464.10	$1,742.40	
10/01/2025	10/31/2025	10/01/2025	GTO	$1,464.10	$1,742.40	
11/01/2025	11/30/2025	11/01/2025	GTO	$1,464.10	$1,742.40	
12/01/2025	12/31/2025	12/01/2025	GTO	$1,464.10	$1,742.40	
01/01/2026	01/31/2026	01/01/2026	GTO	$1,464.10	$1,742.40	
02/01/2026	02/28/2026	02/01/2026	GTO	$1,464.10	$1,742.40	

Start Date	End Date	Due Date	Payment Type	Amount (with initial Index Rate 10)	Amount (with new Index Rate 20, switched on 27th Nov, 2023)	Yearly escalation
03/01/2026	**03/31/2026**	**03/01/2026**	**GTO**	**$1,610.51**	**$2,090.88**	**Fifth year escalation**
04/01/2026	04/30/2026	04/01/2026	GTO	$1,610.51	$2,090.88	
05/01/2026	05/31/2026	05/01/2026	GTO	$1,610.51	$2,090.88	
06/01/2026	06/30/2026	06/01/2026	GTO	$1,610.51	$2,090.88	
07/01/2026	07/31/2026	07/01/2026	GTO	$1,610.51	$2,090.88	
08/01/2026	08/31/2026	08/01/2026	GTO	$1,610.51	$2,090.88	
09/01/2026	09/30/2026	09/01/2026	GTO	$1,610.51	$2,090.88	
10/01/2026	10/31/2026	10/01/2026	GTO	$1,610.51	$2,090.88	
11/01/2026	11/30/2026	11/01/2026	GTO	$1,610.51	$2,090.88	
12/01/2026	12/31/2026	12/01/2026	GTO	$1,610.51	$2,090.88	
01/01/2027	01/31/2027	01/01/2027	GTO	$1,610.51	$2,090.88	
02/01/2027	02/28/2027	02/01/2027	GTO	$1,610.51	$2,090.88	

Lease Termination

Lease Termination process is used to end or terminate a lease agreement. Once initiated and the termination justification is provided, the process is routed for review and approval.

Once approved, multiple events take place a s a result of that:

- The original lease agreement is marked “Terminated” and no further payment or invoice processes will be autogenerated from this release record
- The Occupancy Status of the Space record associated with this lease agreement will be updated to “Vacant” status.

Leases Management Business Processes (BPs)

Leases Management Cost Type BPs

The following *Cost type BPs* are available for Leases Management:

BP Name	BP ID	BP Level
CAM Reconciliation	ucr	Project/Shell

BP Name	BP ID	BP Level
Lease Amendment Requests	urelease	Project/Shell
Lease Invoices	uli	Project/Shell
Leases	uleases	Project/Shell
New Lease Requests	unleaser	Project/Shell

Leases Management Line Item Type BPs

The following *Line Item type BPs* are available for Leases Management:

BP Name	BP ID	BP Level
Lease Contacts	ulsco	Company

Leases Management Simple Type BPs

The following *Simple type BPs* are available for Leases Management:

BP Name	BP ID	BP Level
Lease Actions	ulskdact	Project/Shell
Lease Termination	uleasetm	Project/Shell
Lease Payments	TBD	Project/Shell

New Lease Requests Business Process

New Lease Requests BP - Purpose

To allow for the lease terms to be routed for review and approval before the actual lease agreement gets created and activated.

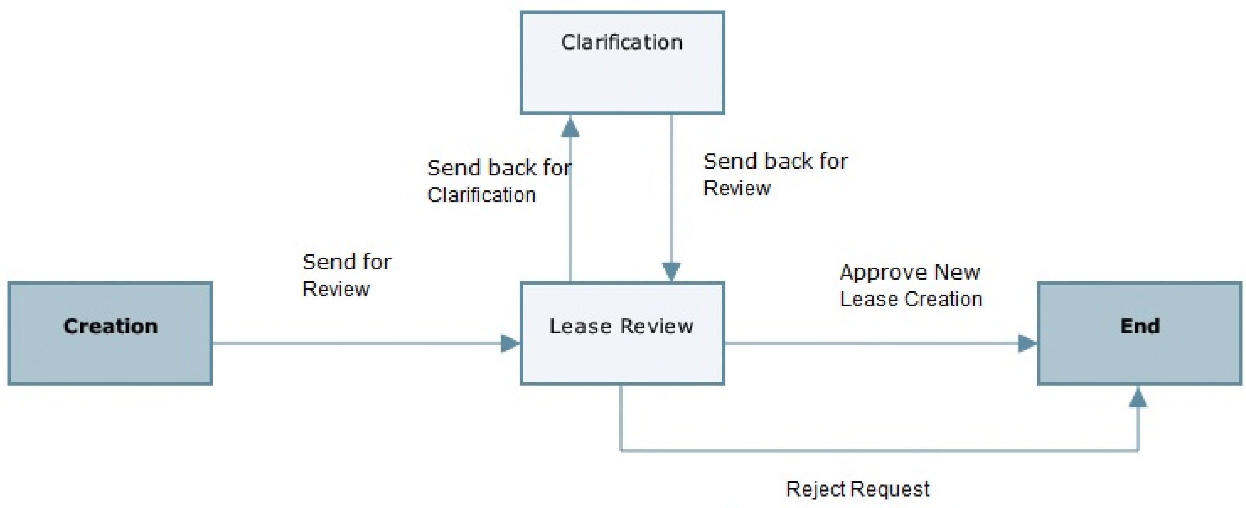
New Lease Requests BP - Level

Project/Shell

New Lease Requests BP - Type

Cost

New Lease Requests BP - Workflow



New Lease Requests BP - View

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.
2) In the left Navigator, select **FAM Master Logs**, select **Lease Management**, and then select **New Lease Requests**.

Leases Business Process

Leases BP - Purpose

To captures all the data related to executing and managing a lease.

Leases BP - Level

Project/Shell

Leases BP - Type

Cost

Sub-type: Line Items with Multiple Codes, Classification followed by Lease

Leases BP - Workflow

Leases BP is a non-workflow BP.

Leases BP - View

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.

2) In the left Navigator, select **FAM Master Logs**, select **Lease Management**, and then select **Leases**.

Or

Navigate to the Shell and view the BP from the Shell Log.

Leases BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Leases**.

Lease Contacts Business Process

Lease Contacts BP - Purpose

To maintain names and contact information for Landlords and Tenants.

Lease Contacts BP - Level

Company

Lease Contacts BP - Type

Line Item

Lease Contacts BP - Workflow

Leases Contacts BP is a non-workflow BP.

Lease Contacts BP - View

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.
2) In the left Navigator, select **FAM Master Logs**, select **Lease Management**, and then select **Leases Contacts**.

Or

Navigate to the Shell and view the BP from the Shell Log.

Lease Contacts BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Lease Contacts**.

CAM Reconciliation Business Process

CAM Reconciliation BP - Purpose

To reconcile the amount of payments made towards CAM with the actual CAM obligations

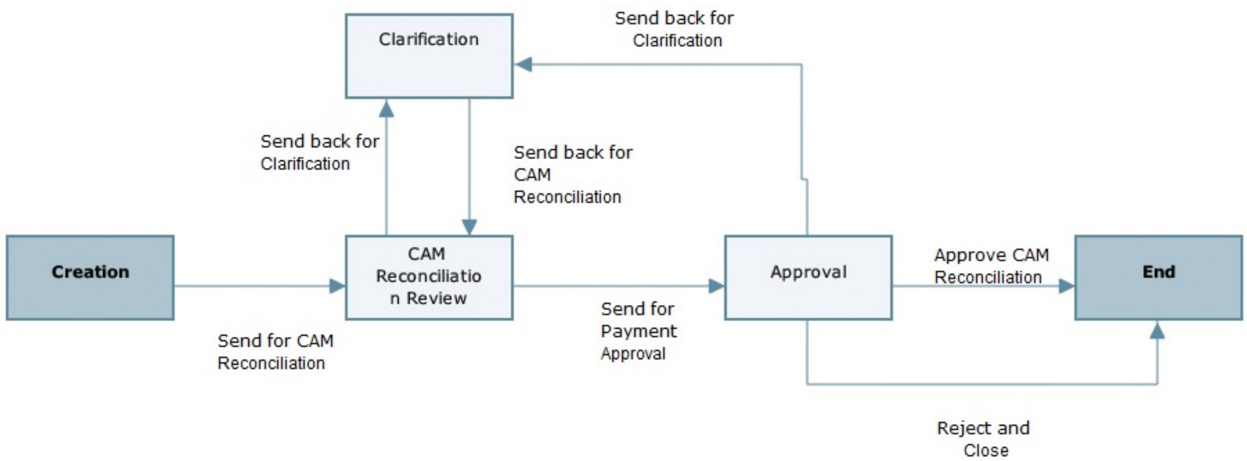
CAM Reconciliation BP - Level

Project/Shell

CAM Reconciliation BP - Type

Cost

CAM Reconciliation BP - Workflow



CAM Reconciliation BP - View

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.
2) In the left Navigator, select **FAM Master Logs**, select **Lease Management**, and then select **CAM Reconciliation**.

Or

Navigate to the Shell and view the BP from the Shell Log.

CAM Reconciliation BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **CAM Reconciliation**.

Lease Actions Business Process

Lease Actions BP - Purpose

Lease Actions are BP records autogenerated from the Lease record for certain Critical Dates that require an action/task and follow up from someone assigned this action.

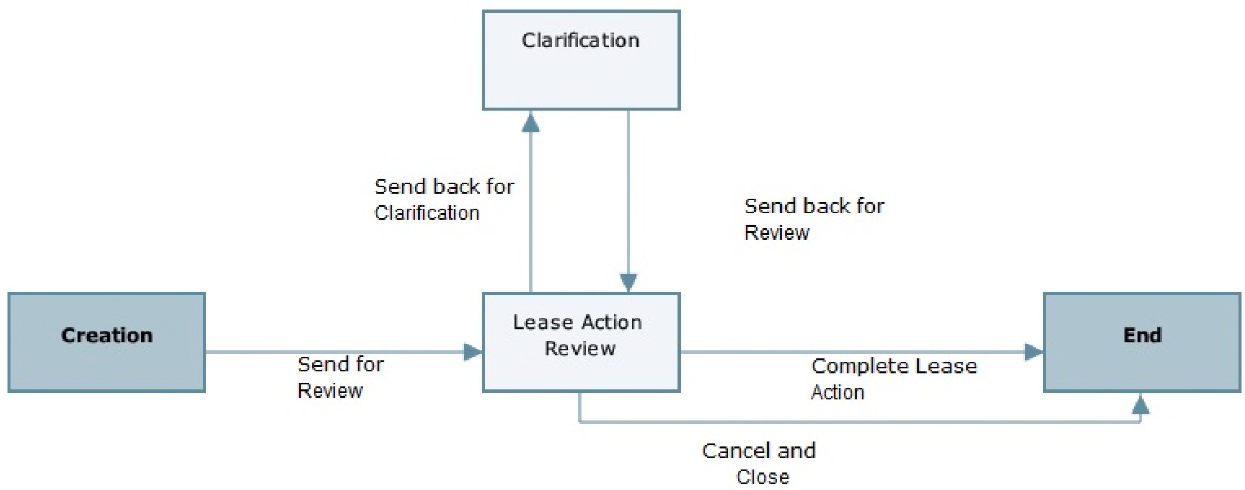
Lease Actions BP - Level

Project/Shell

Lease Actions BP - Type

Simple

Lease Actions BP - Workflow



Lease Actions BP - View

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.
2) In the left Navigator, select **FAM Master Logs**, select **Lease Management**, and then select **Lease Actions**.

Or

Navigate to the Shell and view the BP from the Shell Log.

Lease Actions BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.

4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Lease Actions**.

Lease Amendment Requirements Business Process

Lease Amendment Requirements BP - Purpose

To request a modification to an existing Lease and has significant impact on the overall terms or payments of the lease to justify amending the original lease record.

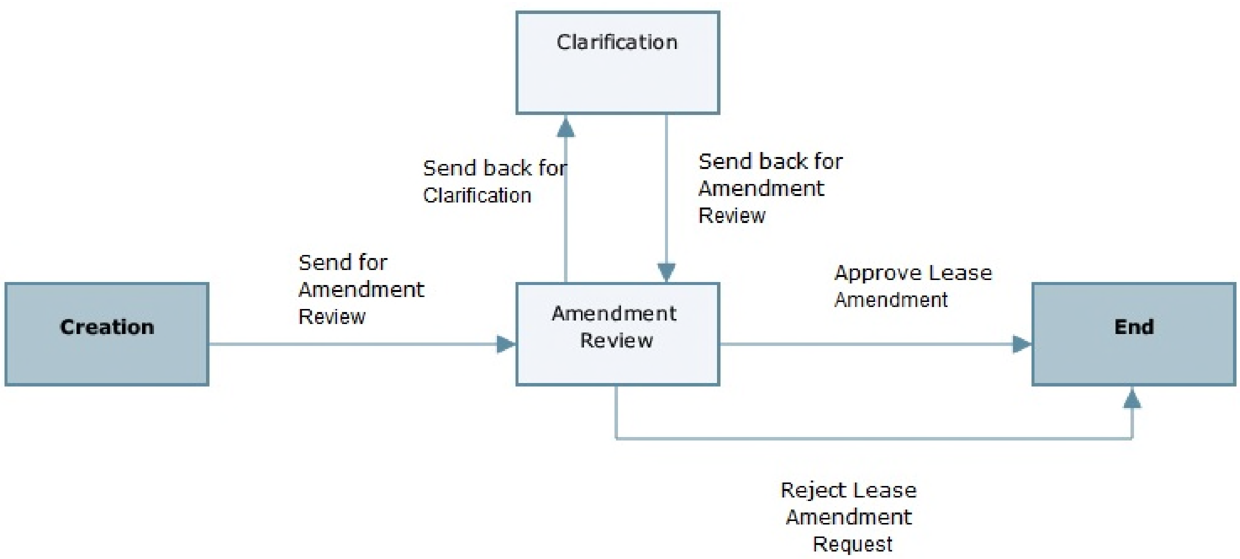
Lease Amendment Requirements BP - Level

Project/Shell

Lease Amendment Requirements BP - Type

Cost

Lease Amendment Requirements BP - Workflow



Lease Amendment Requirements BP - View

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.
2) In the left Navigator, select **FAM Master Logs**, select **Lease Management**, and then select **Lease Amendment Requirements**.

Or

Navigate to the Shell and view the BP from the Shell Log.

Lease Amendment Requirements BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Lease Amendment Requirements**.

Lease Invoices Business Process

Lease Invoices BP - Purpose

The lease invoice record has a reference to the lease record that generated it and line items are automatically populated with the relevant charge type and amount. Lease Invoices are then routed for review and approval.

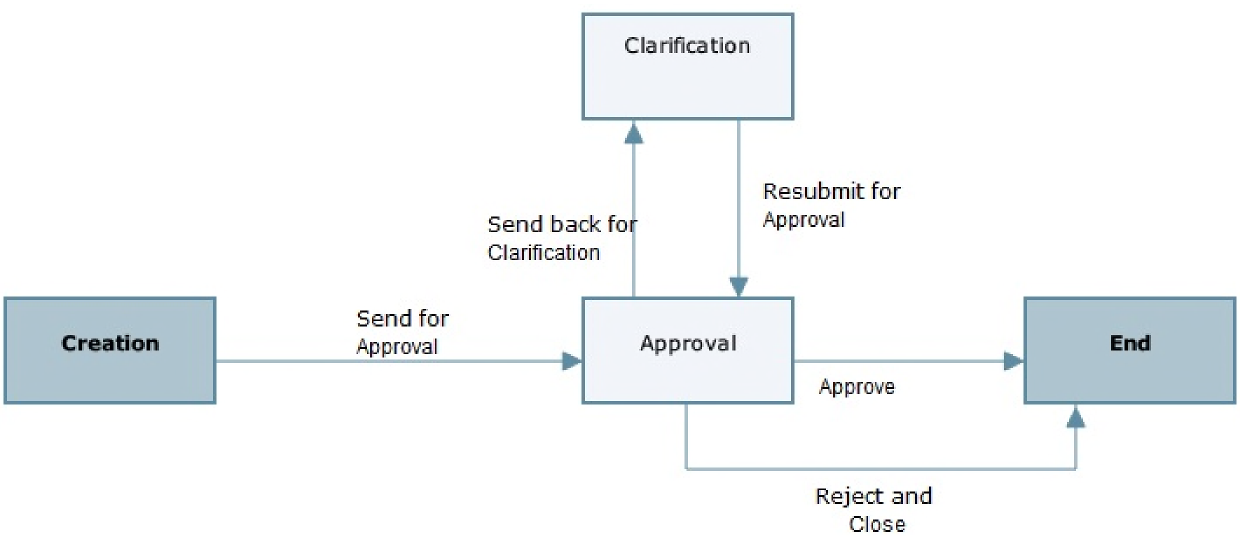
Lease Invoices BP - Level

Project/Shell

Lease Invoices BP - Type

Cost

Lease Invoices BP - Workflow



Lease Invoices BP - View

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.
2) In the left Navigator, select **FAM Master Logs**, select **Lease Management**, and then select **Lease Invoices**.

Or

Navigate to the Shell and view the BP from the Shell Log.

Lease Invoices BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Lease Invoices**.

Lease Payments Business Process

Lease Payments BP - Purpose

The Lease Payment record has a reference to the lease record that generated it and line items are automatically populated with the relevant charge type and amount. Lease Payments are then routed for review and approval.

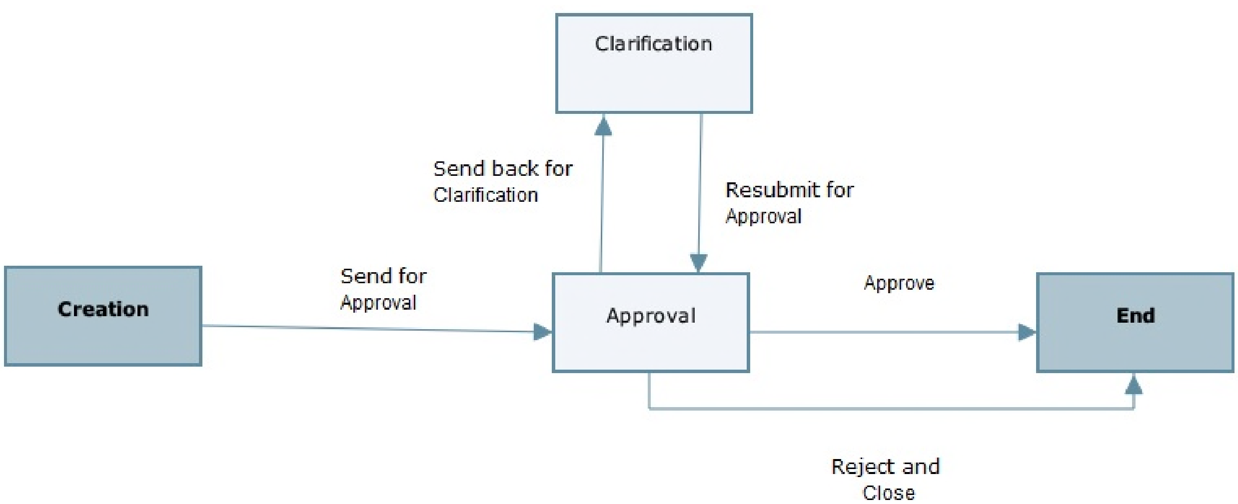
Lease Payments BP - Level

Project/Shell

Lease Payments BP - Type

Cost

Lease Payments BP - Workflow



Lease Payments BP - View

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.

2) In the left Navigator, select **FAM Master Logs**, select **Lease Management**, and then select **Lease Payments**.

Or

Navigate to the Shell and view the BP from the Shell Log.

Lease Payments BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Lease Payments**.

Lease Termination Business Process

Lease Termination BP - Purpose

To end or terminate a lease agreement.

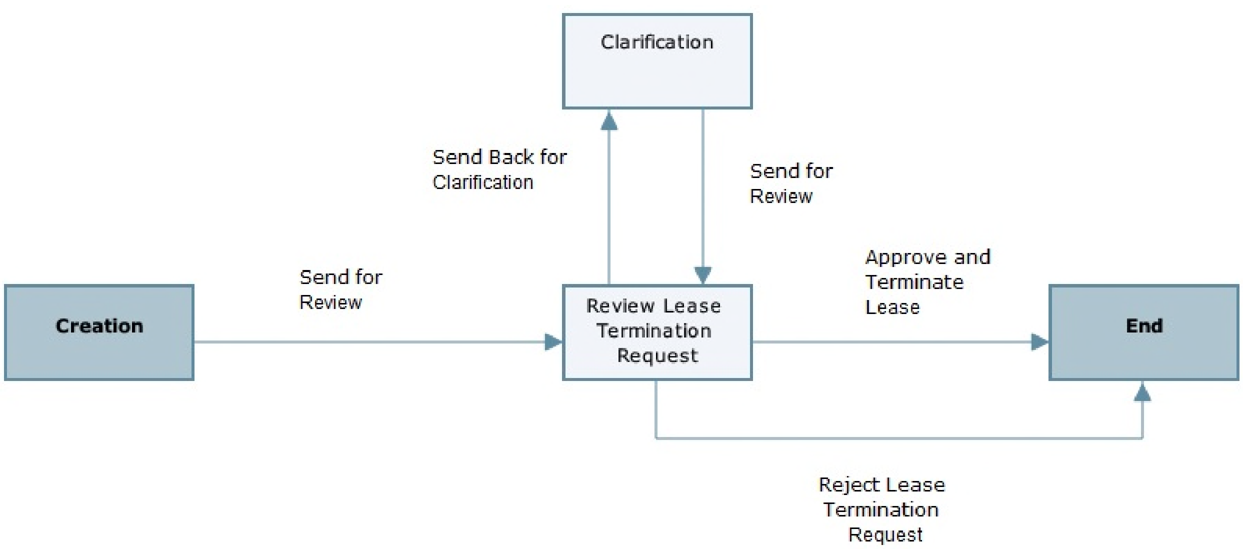
Lease Termination BP - Level

Project/Shell

Lease Termination BP - Type

Simple

Lease Termination BP - Workflow



Lease Termination BP - View

1) Go to the **Home** tab (Home workspace) and switch to **User** mode.
2) In the left Navigator, select **FAM Master Logs**, select **Lease Management**, and then select **Lease Termination**.

Or

Navigate to the Shell and view the BP from the Shell Log.

Lease Termination BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Lease Termination**.

Leases Management User-Defined Reports (UDRs)

The following is a list of the UDRs:

UDR Name	UDR Description	UDR Data Type	UDR Report Type
Lease Abstract Report	NA	Leases	Tabular
Lease by Lease Type	NA	Leases	Tabular
Lease Critical Dates	NA	Leases	Tabular
Lease Payment Details	Lease Payment Details	Lease Payments	Tabular
Lease Payment Summary	Lease Payment Summary	Lease Payments	Tabular
Lease Rent Roll	NA	Leases	Tabular
Rent Variance by Month	NA	Leases	Cross Tab

Real Estate: Transactions Management

Unifier Real Estate Management supports a variety of common real estate transaction types such as site selection and acquisition, dispositions, new lease initiation, subleasing and lease termination, and more. Flexible workflows are used to manage the scope, tasks, and deadlines associated with each transaction. As a result, users can route, review, and approve transactions and track and manage every step of the transaction process. Transaction projects can be created for complex real estate transactions such as new site selection and acquisition or disposition. Scope, schedules, costs, documents, and related due diligence processes (including candidate sites and site comparisons) can all be managed in these transaction projects. Similar to the other Primavera solutions, the application provides task reminders, notifications, document management, messaging, and reporting.

Transaction management enables you to manage:

- Prospective Properties
- Property Acquisitions
- Property Dispositions
- Property Creation
- Transaction Management Business Processes

> **Note**: Information about the Transactions Management Business Processes (BPs) is provided below.

Prospective Properties

Identifying the prospective properties is a process used to capture all the relevant data on properties of interest and under consideration for acquisition, or leasing. The data captured through this process is used in the property acquisition process to select the best property that meets the criteria.

Property Acquisitions

The property acquisitions is a process used for specifying the needs and criteria related to a real estate acquisition transaction. In this process, each criteria is prioritized with a weight value, based on the importance to the acquisition initiative. On the line items, the user selects properties from the prospective properties and rates each property data according to how close it satisfies the acquisition needs and criteria.

The information collected during this process is used to auto-calculate a score for each property under consideration. The score enables the user to make an informed decision about a prospective property.

> **Note**: An additional step is included to help complete the transaction and include the property to the real estate portfolio by automatically creating the property Shell and place it in the proper location in the overall real estate portfolio hierarchy.

Property Dispositions

Property dispositions is a simple process that identifies the property that will be disposed and provides the justification/reason for the disposition. Once approved, the property-ownership status changes to “Disposed”.

The Property Disposition process is used when a property (Building, Land or Linear Asset) is disposed or sold and is no longer party of the portfolio. The process allows the requestor to submit a request and specify which property to be disposed and the reasons. The default workflow allows the request to be reviewed and either approved or rejected. Once approved, the selected property Ownership Status is then changed to “Disposed”.

Property Creation

This process is used to initiate the request for creating the property that was selected to be acquired in the Property Acquisition process.

Transactions Management Business Processes (BPs)

Transactions Management Line Item BPs

The following *Line Item type BPs* are available for Transaction Management:

BP Name	BP ID	BP Level
Property Acquisitions	upra	Project/Shell

Transactions Management Simple Type BPs

The following *Simple type BPs* are available for Transaction Management:

BP Name	BP ID	BP Level
Prospective Properties	upp	Project/Shell
Property Dispositions	upd	Project/Shell
Property Creator	upc	Project/Shell

Prospective Properties Business Process

Prospective Properties BP - Purpose

To capture data used in the property acquisition process to select the best property that meets the criteria.

Prospective Properties BP - Level

Project/Shell

Prospective Properties BP - Type

Simple

Prospective Properties BP - Workflow

Prospective Properties BP is a non-workflow BP.

Record Statuses

- Considered
- Acquired
- Available

Groups Associated with this BP

Corporate Real Estate and Real Estate Managers can create and edit this BP.

Prospective Properties BP - Create

To create a Prospective Properties BP:

1) From the User mode, navigate to the **All Properties** node.
2) In the left Navigator, select **Transactional Management**, and then select **Prospective Properties**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

Property Acquisitions Business Process

Property Acquisitions BP - Purpose

To collect information and auto-calculate a score for each property under consideration.

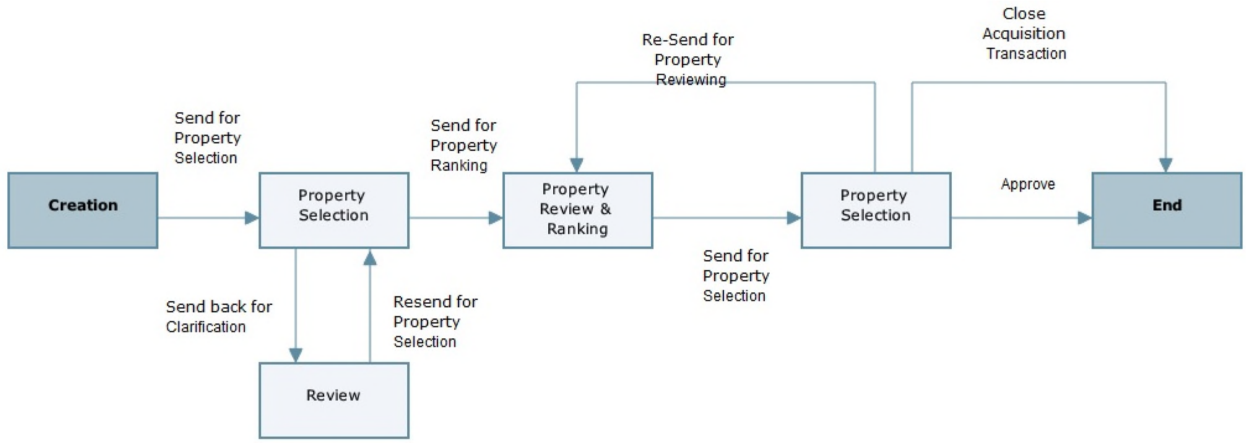
Property Acquisitions BP - Level

Project/Shell

Property Acquisitions BP - Type

Line Item

Property Acquisitions BP - Workflow



Record Statuses

- Pending
- Approved
- Canceled
- Rejected

Groups Associated with this BP

Creation, Property Selection, Property Review & Ranking, Property Selection, and review Steps: Corporate Real Estate, Corporate Real Estate Finance, Finance, Real Estate Managers.

Property Acquisitions BP - Create

To create a Property Acquisitions BP:

1) From the **User** mode, navigate to the **All Properties** node.
2) In the left Navigator, select **Transactional Management**, and then select **Property Acquisitions**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) From the **Workflow Actions** drop-down menu, select **Send for Property Selection**.

Property Dispositions Business Process

Property Dispositions BP - Purpose

To identify the property that will be disposed and provides the justification/reason for the disposition.

Property Dispositions BP - Level

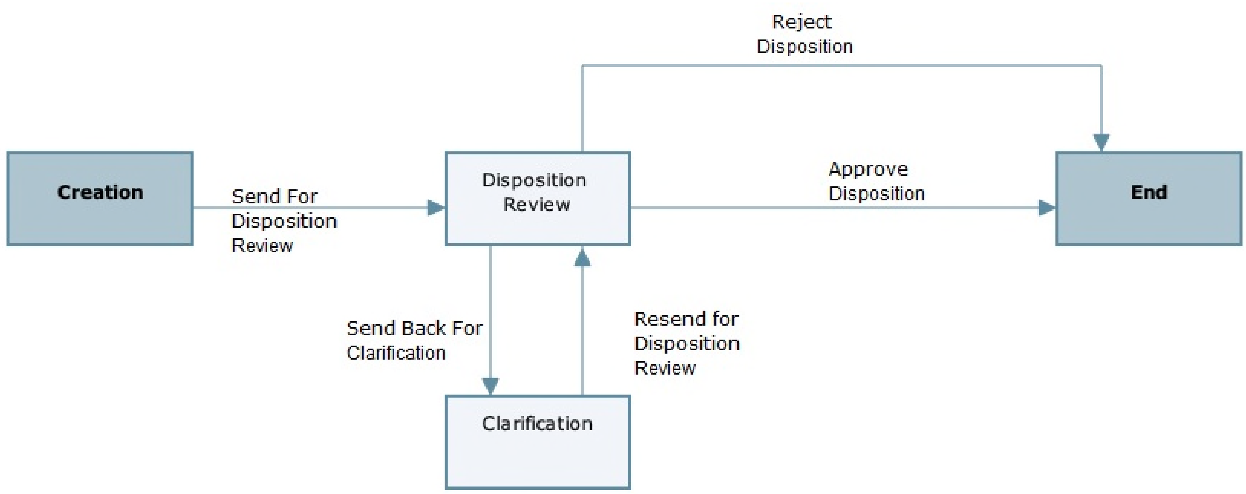
Project/Shell

Property Dispositions BP - Type

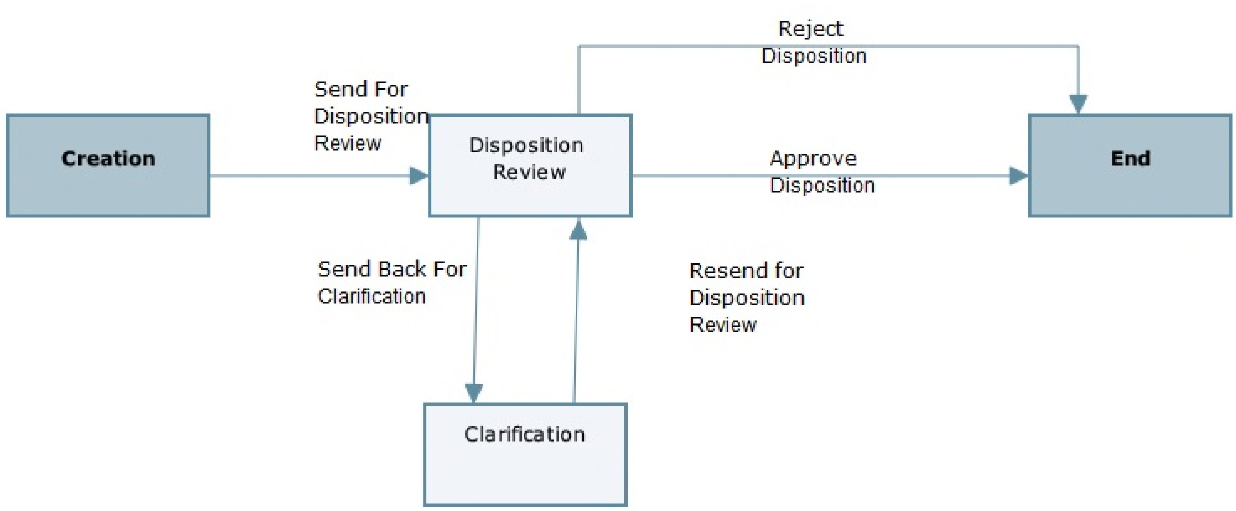
Simple

Property Dispositions BP - Workflow

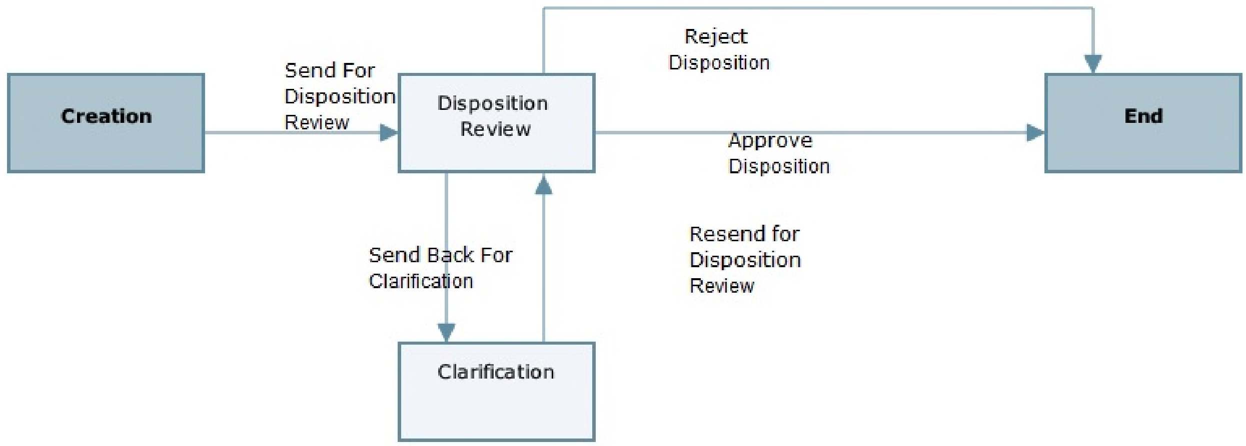
Building Disposition



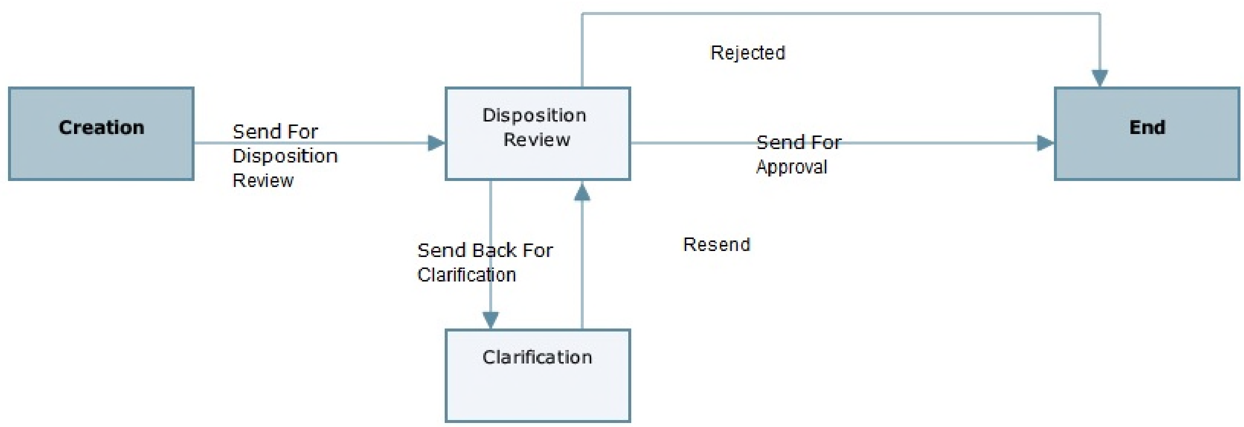
Land Disposition



Linear Asset Disposition



PD Workflow set up



Record Statuses

- Pending
- Approved
- Rejected
- Canceled
- On-hold

Groups Associated with this BP

Creation, Disposition Review, Clarification Steps: Corporate Real Estate, Corporate Real Estate Finance, Finance, Real Estate Managers.

Property Dispositions BP - Create

To create a Property Dispositions BP:

1) From the User mode, navigate to the **All Properties** node.
2) In the left Navigator, select **Transactional Management**, and then select **Property Dispositions**.
3) From the BP log:

   In **Standard View:**

   a. Click **Create**.
   b. From the **Select Business Process Origin** drop-down list, ensure that your project is selected.
   c. From the **Select Business Process** drop-down list, ensure that the BP you want to create is selected.
   d. From the **Select Workflow** drop-down list, select from one of the following workflows: **Building Disposition**, **Linear Asset Disposition**, or **Land Disposition**.
   e. Click **Create**.

   In **Classic View**:

   f. From the toolbar, click **New**.
   g. From the **Workflow** drop-down list, select from one of the following workflows: **Building Disposition**, **Linear Asset Disposition**, or **Land Disposition**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) From the **Workflow Actions** drop-down menu, select **Send For Disposition Review**.

Property Creation Request Business Process

Property Creation Request BP - Purpose

The Property Creation Requests process is used to initiate the creation of a new shell (Building or Land) as a result of Real Estate Property Acquisition approved transaction. The Property Creation Request is typically assigned to a user or a group responsible for the creation of new shells in the portfolio.

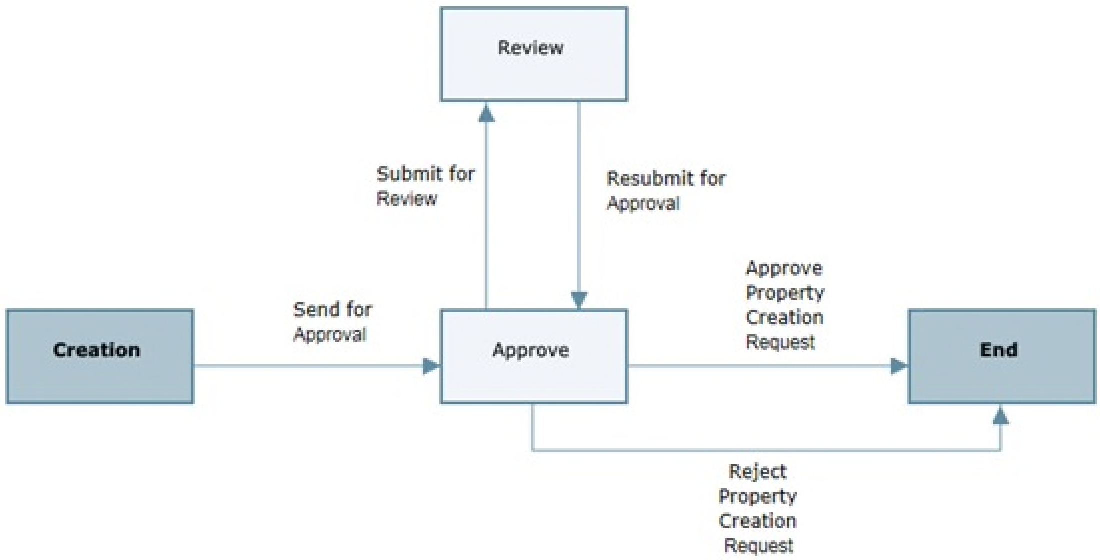
Property Creation Request BP - Level

Shell

Property Creation Request BP - Type

Project/Shell Creation

Property Creation Request BP - Workflow



Record Statuses

- Approved
- In_review
- Rejected

Groups Associated with this BP

Creation, Approve, and review Steps: Corporate Real Estate, Corporate Real Estate Finance, Finance, Real Estate Managers.

Property Creation Request BP - Create

To create a Property Creation request BP:

1) From the User mode, navigate to the **All Properties** node.
2) In the left Navigator, select **Transactional Management**, and then select **Property Creation Request**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) From the **Workflow Actions** drop-down menu, select **Send For Approval**.

Transactions Management User-Defined Reports (UDRs)

The following is a list of the UDRs:

UDR Name	UDR Description	UDR Data Type	UDR Report Type
Property Acquisition Details	Property Acquisition Details	Property Acquisition	Tabular
Property Dispositions	Property Dispositions	Property Dispositions	Tabular
Prospective Properties	Prospective Properties	Prospective Properties	Tabular

Transactions Management Custom Reports

The following is a list of Custom Reports:

Custom Report Name	Location
Property Acquisition Report	All Properties (Shell)

Real Estate: Real Estate Data Management

Real Estate Data management enables you to record, organize, and manage various real estate data for record keeping and easy search and retrieve. Real Estate Data management manages the following:

- Parcels
- Deeds
- Titles
- Insurance
- Easements
- Property Taxes
- RE Payments
- Permits

Real Estate Data management enables you to manage:

- Property Titles
- Certificate of Insurance
- Deeds
- Easements
- Parcels
- Permits
- Property Taxes
- Real Estate Payments

Note: Information about the Real Estate Data Management Business Processes (BPs) is provided below.

Property Titles

Property Titles process is used to capture data related to real estate property titles such as Property Name, Address, Date Title Executed, and so forth.

Certificate of Insurance

Certificate of Insurance process is used to capture data related to insurance certificates such as Policy Number, Date of Issue, Name of Insured person/entity, Waiver Clauses, Insurance Coverage amounts, and so forth.

Deeds

Deeds process is used to capture data related to real property deeds such as Deed Title, related parcel, Grantors' and Grantees' Names and mailing addresses, Deed Type, transfer Date, and so forth.

Easements

Easements process is used to capture data related to a property such as Easement Type, Considerations, and so forth.

Parcels

Parcels process is used to capture property parcel data such as Parcel Number, Notes, Parcel Size, Legal Description, Parcel Map/Image, Parcel Category and type, Zoning, and so forth.

Permits

Permits process is used to document and track property such as Permit Type, Issue Date, Permit expiration date, and so forth.

Property Taxes

Property Taxes process is used to capture real estate property tax payments including Tax Type, Amount, Parcel Number, Address, Payee Name, and so forth.

Real Estate Payments

Real Estate Payment is a generic process used to initiate and approve generic payment requests for real estate expenditures.

Real Estate Data Management Business Processes (BPs)

Real Estate Data Management Cost Type BPs

The following *Cost type BPs* are available for Real Estate Data Management:

BP Name	BP ID	BP Level
Property Taxes	uxpt	Project/Shell
Real Estate Payments	uxrp	Project/Shell

Real Estate Data Management Simple Type BPs

The following *Simple type BPs* are available for Real Estate Data Management:

BP Name	BP ID	BP Level
Certificate of Insurance	uxcoi	Project/Shell
Deeds	uxdeds	Project/Shell
Easements	uxem	Project/Shell
Parcels	uxpar	Project/Shell
Permits	uxpe	Project/Shell
Titles	uxtit	Project/Shell

The BPs listed above are available in the Master Log of the Home tab (Home workspace) to enable you to conduct global searches across the entire portfolio. For example, you can search for a particular Deed record, or a Title record, in the entire portfolio.

Note: You can modify the metadata on these BPs to address specific needs.

Certificate of Insurance Business Process

Certificate of Insurance BP - Purpose

Certificate of Insurance process is used to capture data related to insurance certificates such as Policy Number, Date of Issue, Name of Insured person/entity, Waiver Clauses, Insurance Coverage amounts, and so forth.

Certificate of Insurance BP - Level

Project/Shell

Certificate of Insurance BP - Type

Simple

Certificate of Insurance BP - Workflow

Certificate of Insurance BP is a non-workflow BP.

Record Statuses

- Active
- Inactive
- Canceled
- Pending

Groups Associated with this BP

Corporate Real Estate, Property Managers, Facility Managers, and Real Estate Managers can create and edit this BP.

Certificate of Insurance BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Certificate of Insurance**.

Certificate of Insurance BP - Create

To create a Certificate of Insurance BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Real Estate Data Management**, and then select **Certificate of Insurance**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

Deeds Business Process

Deeds BP - Purpose

Deeds process is used to capture data related to real property deeds such as Deed Title, related parcel, Grantors' and Grantees' Names and mailing addresses, Deed Type, transfer Date, and so forth.

Deeds BP - Level

Project/Shell

Deeds BP - Type

Simple

Deeds BP - Workflow

Deeds BP is a non-workflow BP.

Record Statuses

- Active
- Inactive

Groups Associated with this BP

Corporate Real Estate, Property Managers, Facility Managers, and Real Estate Managers can create and edit this BP.

Deeds BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Deeds**.

Deeds BP - Create

To create a Deeds BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Real Estate Data Management**, and then select **Deeds**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

Easements Business Process

Easements BP - Level

Easements process is used to capture data related to a property such as Easement Type, Considerations, and so forth.

Easements BP - Level

Project/Shell

Easements BP - Type

Simple

Easements BP - Workflow

Easements BP is a non-workflow BP.

Record Statuses

- Pending
- Active
- Inactive

Groups Associated with this BP

Corporate Real Estate, Property Managers, Facility Managers, and Real Estate Managers can create and edit this BP.

Easements BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Easements**.

Easements BP - Create

To create an Easements BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Real Estate Data Management**, and then select **Easements**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

Parcels Business Process

Parcels BP - Purpose

Parcels process is used to capture property parcel data such as Parcel Number, Notes, Parcel Size, Legal Description, Parcel Map/Image, Parcel Category and type, Zoning, and so forth.

Parcels BP - Level

Project/Shell

Parcels BP - Type

Simple

Parcels BP - Workflow

Parcels BP is a non-workflow BP.

Record Statuses

- Active

- Inactive

Groups Associated with this BP

Corporate Real Estate, Property Managers, Facility Managers, and Real Estate Managers can create and edit this BP.

Titles BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Titles**.

Parcels BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Parcels**.

Parcels BP - Create

To create a Parcels BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Real Estate Data Management**, and then select **Parcels**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

Permits Business Process

Permits BP - Purpose

Permits process is used to document and track property such as Permit Type, Issue Date, Permit expiration date, and so forth.

Permits BP - Level

Project/Shell

Permits BP - Type

Simple

Permits BP - Workflow

Permits BP is a non-workflow BP.

Record Statuses

- Pending
- Approved
- Rejected

Groups Associated with this BP

Corporate Real Estate, Property Managers, Facility Managers, and Real Estate Managers can create and edit this BP.

Permits BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Permits**.

Permits BP - Create

To create a Permits BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Real Estate Data Management**, and then select **Permits**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

Property Taxes Business Process

Property Taxes BP - Purpose

Property Taxes process is used to capture real estate property tax payments including Tax Type, Amount, Parcel Number, Address, Payee Name, and so forth.

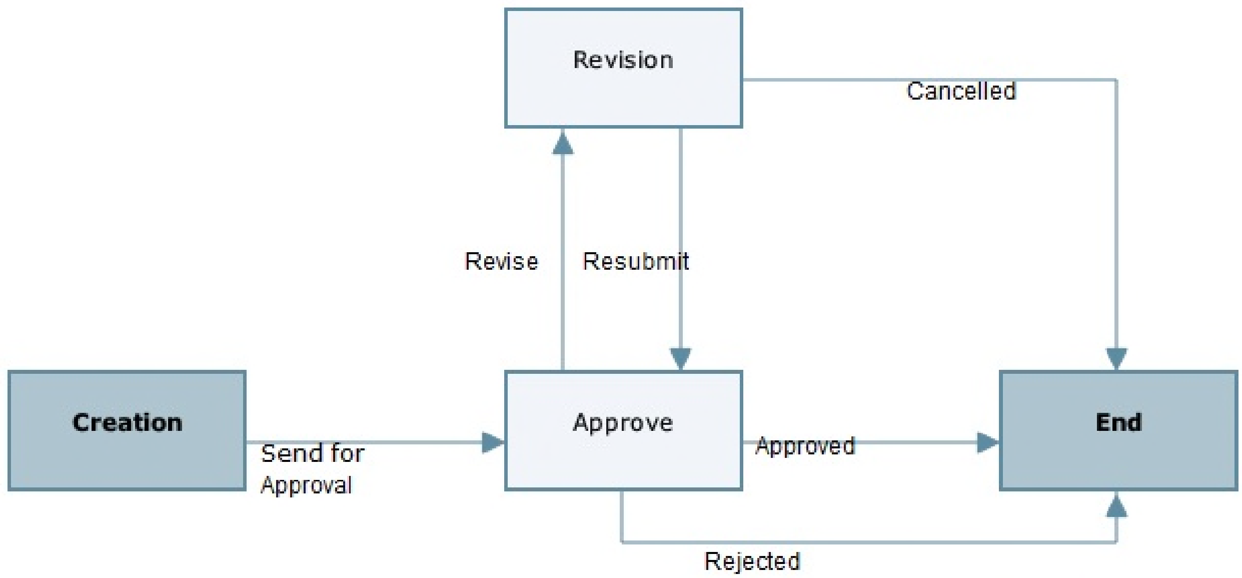
Property Taxes BP - Level

Project/Shell

Property Taxes BP - Type

Cost

Property Taxes BP - Workflow



Record Statuses

- Pending
- Approved
- Rejected
- Canceled

Groups Associated with this BP

Finance, Property Managers, and Real Estate Managers can create, edit, and approve this BP.

Property Taxes BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Property Taxes**.

Property Taxes BP - Create

To create a Property Taxes BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Real Estate Data Management**, and then select **Property Taxes**.
3) In the BP log, click **Create**.
4) From the **Workflow Actions** drop-down menu, select **Send For Approval**.

Real Estate Payments Business Process

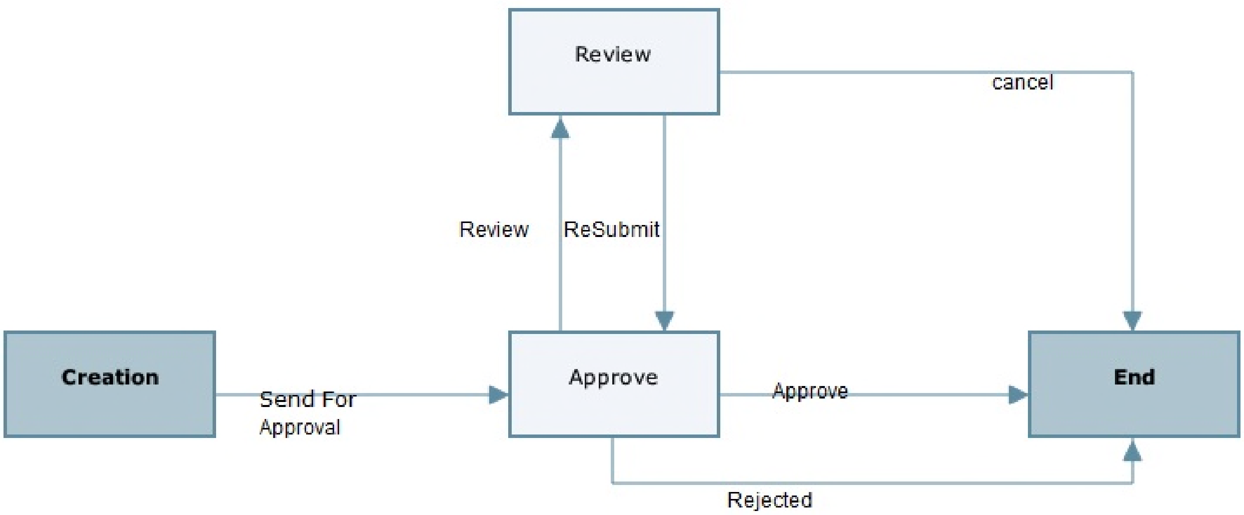
Real Estate Payments BP - Level

Project/Shell

Real Estate Payments BP - Type

Cost

Real Estate Payments BP - Workflow



Record Statuses

- Pending
- Approved
- Rejected
- Withdrawn
- Canceled

Groups Associated with this BP

Finance, Property Managers, and Real Estate Managers can create, edit, and approve this BP.

Real Estate Payments BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Real Estate Payments**.

Real Estate Payments BP - Create

To create a Real Estate Payments BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Real Estate Data Management**, and then select **Real Estate Payments**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) From the **Workflow Actions** drop-down menu, select **Send For Approval**.

Titles Business Process

Titles BP - Purpose

Property Titles process is used to capture data related to real estate property titles such as Property Name, Address, Date Title Executed, and so forth.

Titles BP - Level

Shell

Titles BP - Type

Simple

Titles BP - Workflow

Titles BP is a non-workflow BP.

Record Statuses

- Active
- Inactive

Groups Associated with this BP

Corporate Real Estate, Property Managers, Facility Managers, and Real Estate Managers can create and edit this BP.

Titles BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Titles**.

Titles BP - Create

To create a Titles BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Real Estate Data Management**, and then select **Titles**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

Real Estate Data Management User-Defined Reports (UDRs)

The following is a list of the UDRs:

UDR Name	UDR Description	UDR Data Type	UDR Report Type
Certificate of Insurance	Certificate of Insurance	Certificate of Insurance	Tabular
Deed Records Summary	Real Estate Data Management (Deeds)	Deeds	Tabular
Easement Records Summary	Real Estate Data Management (Easements)	Easements	Tabular
Parcel Records Summary	Real Estate Data Management (Parcels)	Parcels	Tabular
Permit Records Summary	Real Estate Data Management (Permits)	Permits	Tabular
Property Taxes	Property Taxes	Property Taxes	Tabular
Real Estate Payments	Real Estate Payments	Real Estate Payments	Tabular
Title Records Summary	Real Estate Data Management (Titles)	Titles	Tabular

Real Estate: Utilities and Sustainability Management

Utilities and Sustainability management enables you to manage:

- Carbon Footprint
- Emissions
- Energy (Electric and Gas)
- LEED Certifications

- LEED Realized Benefits
- Recycling
- Waste Generation
- Energy Management Business Processes

Note: Information about the Utilities and Sustainability Management Business Processes (BPs) is provided below.

Carbon Footprint

Carbon Footprint process is used to capture basic information that can be used to calculate the total carbon footprint and associated cost for a facility. The details form line items allows you to capture detailed energy utilization data by type and date range.

Emissions

Emissions process is used to capture emissions related data for a facility such as emission type, meter name, date range and total quantity.

Utilities Management

The Utilities Management covers the utilities- and energy-related processes such as the electric, water, gas, and so forth.

LEED Certifications

The LEED Certification process is used by organizations to perform a self-check and validation on the level of LEED Certification and earned points they may qualify for. The process form is divided into several sections and a series of questions for each section to help dynamically calculate the earned LEED points and performs a LEED level validation. The sections include questions in the following categories: Sustainable Sites, Water Efficiency, Energy and Atmosphere, Materials and Resources, Indoor Environmental Quality, Innovations in Operations, Regional Priority Credits.

LEED Realized Benefits

This process is used to quantify the realized benefits of implementing a sustainability upgrade or renovation project/initiative. The process provides data points for LEED Category, Savings (5 Yr. NPV), CO2 reductions, Water Use Reductions, Energy Consumption Reductions, and so forth.

Recycling

This Recycling process is used to capture the data related to the material type being recycles, date range, quantity of recycled material and estimated value/amount.

Waste Generation

The Waste Generation process provide the ability to capture the data related to Waste Type, quantity, data range and estimated value of the waste generation.

Utilities and Sustainability Management Business Processes (BPs)

Utilities and Sustainability Line Item Type BPs

The following *Line Item type BPs* are available for Utilities and Sustainability Management:

BP Name	BP ID	BP Level
Carbon Footprint	ucf	Project/Shell
Recycling	urcy	Project/Shell
Waste Generation	uwg	Project/Shell

Utilities and Sustainability Simple Type BPs

The following *Simple type BPs* are available for Utilities and Sustainability Management:

BP Name	BP ID	BP Level
Emissions	uem	Project/Shell
LEED Certification Levels	uleedlvl	Project/Shell
LEED Certifications	ulledc	Project/Shell
LEED Realized Benefits	uleedr	Project/Shell

Carbon Footprint Business Process

Carbon Footprint BP - Purpose

Carbon Footprint process is used to capture basic information that can be used to calculate the total carbon footprint and associated cost for a facility. The details form line items allows you to capture detailed energy utilization data by type and date range.

Carbon Footprint BP - Level

Project/Shell

Carbon Footprint BP - Type

Line Item

Carbon Footprint BP - Workflow

Carbon Footprint BP is a non-workflow BP.

Record Statuses

- Pending
- Approved

Groups Associated with this BP

Building Managers, Facilities Environment Managers, Facility Managers, and HSE Managers can create and edit this BP.

Carbon Footprint BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Carbon Footprint**.

Carbon Footprint BP - Create

To create a Carbon Footprint BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Utilities Management**, and then select **Carbon Footprint**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

Emissions Business Process

Emissions BP - Purpose

Emissions process is used to capture emissions related data for a facility such as emission type, meter name, date range and total quantity.

Emissions BP - Level

Project/Shell

Emissions BP - Type

Simple

Emissions BP - Workflow

Emissions BP is a non-workflow BP.

Record Statuses

- Rejected

- Pending
- Approved

Groups Associated with this BP

Building Managers, Facilities Environment Managers, Facility Managers, and HSE Managers can create and edit this BP.

Emissions BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Emissions**.

Emissions BP - Create

To create an Emissions BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Utilities Management**, and then select **Emissions**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

Recycling Business Process

Recycling BP - Purpose

This Recycling process is used to capture the data related to the material type being recycles, date range, quantity of recycled material and estimated value/amount.

Recycling BP - Level

Project/Shell

Recycling BP - Type

Line Item

Recycling BP - Workflow

Recycling BP is a non-workflow BP.

Record Statuses

- Canceled
- In_review
- Reviewed

Groups Associated with this BP

Building Managers, Facilities Environment Managers, Facility Managers, and HSE Managers can create and edit this BP.

Recycling BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Recycling**.

Recycling BP - Create

To create a Recycling BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Utilities Management**, and then select **Recycling**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

Waste Generation Business Process

Waste Generation BP - Purpose

The Waste Generation process provide the ability to capture the data related to Waste Type, quantity, data range and estimated value of the waste generation.

Waste Generation BP - Level

Project/Shell

Waste Generation BP - Type

Line

Waste Generation BP - Workflow

Waste Generation is a non-workflow BP.

Record Statuses

- Canceled
- In_review
- Reviewed

Groups Associated with this BP

Building Managers, Facilities Environment Managers, Facility Managers, and HSE Managers can create and edit this BP.

Waste Generation BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **Waste Generation**.

Waste Generation BP - Create

To create a Waste Generation BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Utilities Management**, and then select **Waste Generation**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

LEED Certifications Business Process

LEED Certifications BP - Purpose

The LEED Certification process is used by organizations to perform a self-check and validation on the level of LEED Certification and earned points they may qualify for.

LEED Certifications BP - Level

Project/Shell

LEED Certifications BP - Type

Simple

LEED Certifications BP - Workflow

LEED Certification BP is a non-workflow BP.

Record Statuses

- Active
- Inactive

Groups Associated with this BP

Building Managers, Facilities Environment Managers, Facility Managers, and HSE Managers can create and edit this BP.

LEED Certifications BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.

2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **LEED Certifications**.

LEED Certifications BP - Create

To create a LEED Certifications BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Sustainability Management**, and then select **LEED Certifications**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.
5) Select **Finish Editing**.

LEED Certification Levels Business Process

LEED Certification Levels BP - Purpose

The LEED Certification process is used by organizations to perform a self-check and validation on the level of LEED Certification and earned points they may qualify for.

LEED Certification Levels BP - Level

Project/Shell

LEED Certification Levels BP - Type

Simple

LEED Certification Levels BP - Workflow

LEED Certification Levels BP is a non-workflow BP.

Record Statuses

- Active
- Inactive

LEED Certification Levels BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.

4) In the left Navigator, select **Setup**, select **Business Process**, and then select **LEED Certifications**.

LEED Realized Benefits Business Process

LEED Realized Benefits BP - Purpose

The process provides data points for LEED Category, Savings (5 Yr. NPV), CO2 reductions, Water Use Reductions, Energy Consumption Reductions, and so forth.

LEED Realized Benefits BP - Level

Project/Shell

LEED Realized Benefits BP - Type

Simple

LEED Realized Benefits BP - Workflow

LEED Realized Benefits BP is a non-workflow BP.

Record Statuses

- Active
- Inactive

Groups Associated with this BP

Building Managers, Facilities Environment Managers, Facility Managers, and HSE Managers can create and edit this BP.

LEED Realized Benefits BP - Template

1) Go to the **Company Workspace** tab and switch to **Admin** mode.
2) In the left Navigator, select **Templates**, select **Shells**, and then select **Buildings**.
3) Open the **MASTER OFFICE BUILDING TEMPLATE**.
4) In the left Navigator, select **Setup**, select **Business Process**, and then select **LEED Realized Benefits**.

LEED Realized Benefits BP - Create

To create a LEED Realized Benefits BP:

1) Go to the shell tab (for example: Building or Campus) where you want to create the record and switch to **User** mode.
2) In the left Navigator, select **Sustainability Management**, and then select **LEED Realized Benefits**.
3) In the BP log, click **Create**.
4) Complete the form. The required fields are in red and marked with an asterisk.

5) Select **Finish Editing**.

Utilities and Sustainability Management User-Defined Reports (UDRs)

The following is a list of the UDRs:

UDR Name	UDR Description	UDR Data Type	UDR Report Type
Carbon Footprint	Utilities Management	Carbon Footprint	Tabular
Emissions	Utilities Management	Emissions	Tabular
Energy Meter	Utilities Management	Energy Meter	Tabular
LEED Certifications	Sustainability Management	LEED Certifications	Tabular
LEED Realized Benefits	Sustainability Management	LEED Realized Benefits	Tabular
Recycling	Utilities Management	Recycling	Tabular
Waste Generation	Utilities Management	Waste Generation	Tabular
Water Meter	Utilities Management	Water Meter	Tabular

Cost Management

The Cost management solution enables you to receive real-time (fully integrated) Cost Controls.

Cost management support includes a pre-defined Cost Account Codes for Revenue, Expense and Liability accounts, and it allows you to modify and develop templates for future use. Cost management also uses dashboards and variance reports to provide you with information pertaining to all cost events and transactions.

As a part of enterprise integration, Cost management enables you to set annual budgets for buildings, facilities, sites, regions, or the entire real estate portfolio.

The Cost management supports:

- Cost control
- Cost transactions
- Support enterprise integration
- Annual Budget
- Budget Changes
- Budget Transfers
- Master Service Agreements
- Facility Requests For Bid
- Purchase Orders
- Purchase Order (PO) Amendments
- Invoices-General Spends
- Invoices-Generic

In This Section

Cost Management User-Defined Reports (UDRs)

The following is a list of the UDRs:

UDR Name	UDR Description	UDR Data Type	UDR Report Type
Invoices Generic-FM Summary Report	Cost Management	Invoices-Generic-FM	Tabular
Invoices General Spends-FM Summary Report	Cost Management	Invoices General Spends-FM	Tabular
FAM Purchase Order Summary	FAM Purchase Order Summary	Purchase Orders-FM	Tabular

UDR Name	UDR Description	UDR Data Type	UDR Report Type
Master Service Agreements Summary Report	NA	Master Service Agreements	Tabular
Rent Variance by Month	NA	Leases	Cross Tab

Vendor Management

The Vendor Management enables you to manage the following Business Processes (BPs):

- Vendor Detailed Records
- Vendor Pre-qualification Process
- Vendor Evaluation Process
- Master Service Agreements
- Facilities Bid Management