

Oracle
Primavera Unifier
Facilities and Asset Management User Guide

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Oracle Primavera Unifier Facilities and Asset Management User Guide

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Introduction

Within the 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 Management (FAM) 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, lease analysis, portfolio management, tax management, lease management, and lease accounting.
- ▶ **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, and site and employee service 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.

FAM 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.

Note:

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

- ▶ Cost control
- ▶ Cost transactions
- ▶ Annual Budget
- ▶ Annual Budget Changes
- ▶ Annual Budget Transfers
- ▶ Master Service Agreements
- ▶ Purchase Orders
- ▶ Purchase Order Amendments
- ▶ Purchase Order Invoices

The **Vendor Management** section explains the following topic, which is common in FAM:

- ▶ Master Service Agreements

In addition, this guide includes the following topics:

- ▶ Organization and Buildings
- ▶ 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

To obtain a configuration package from **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 appears under a general release number, for example, 24.x, 25.x, and so on.

- 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 Read Me file and the configuration package, proceed with importing it to Unifier.

For more information, see **Importing Configuration Packages** in the *Unifier Modules Setup Administration Guide*.

Note: If Support permissions do not allow downloads from the **Patches & Updates** tab, create a Service Request and Support will provide the latest configuration package.

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 15)
- ▶ **Data Structure Setup** (on page 19)
- ▶ **Dashboards** (on page 25)
- ▶ **Groups** (on page 26)
- ▶ **Shell Templates** (on page 27)

Components of FAM

FAM has preconfigured designs for:

- ▶ Business Processes (BPs)
- ▶ Configurable Managers
- ▶ Space Manager

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, RFP sent to Vendors, Contract Award to Vendors, and so forth.

In addition, you receive:

- ▶ Selected platform structure to support the included BPs and shells
- ▶ A suite of BPs that work together to accomplish the tasks
- ▶ Preset company-level and shell-level groups that you can assign users to

Note:

- 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 BPs, Configurable Managers, and Space Manager.
-

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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
- ▶ Document Manager

- ▶ Space Manager
- ▶ Shell Manager
- ▶ User Administration

Note: The following provides details related to Configurable Modules (managers), Document 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 shell-level *Code-based* type manager with the following components:

- ▶ Detail Form
- ▶ Picker
- ▶ **Generic Cost Manager**

The Generic Cost Manager is a shell-level *Generic Cost* type manager with the following components:

- ▶ Detail Form
- ▶ Picker
- ▶ **Material Inventory Manager**

The Material Inventory Manager is a 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 **uDesigner**, and then 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:

▶ **Boundary Area**

The Boundary Area manager is a shell-level Space type manager and contains the following components:

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

▶ **Building Amenity Area**

The Building Amenity Area manager is a shell-level Space type manager and contains the following components:

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

▶ **Building Service Area**

The Building Service Area manager is a shell-level Space type manager and contains the following components:

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

▶ **Leasable Space**

The Leasable Space manager is a shell-level Space type manager and contains the following components:

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

▶ **Level**

The Level manager is a shell level-level type manager and contains the following components:

- ▶ Detail Form
- ▶ Log

▶ **Major Vertical Penetration**

The Major Vertical Penetration manager is a shell-level Space type manager and contains the following components:

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

‣ **Office Space**

The Office Space manager is a shell-level Space type manager and contains the following components:

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

‣ **Other Rentable Exclusion**

The Other Rentable Exclusion manager is a 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 **uDesigner**, and then 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:

‣ **Organization**

The Organization 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)

‣ **Warehouse**

The Warehouse 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 **uDesigner**, and then 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 **uDesigner**, and then 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
- Table Partitions
- 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:

- uf_ls_invsched_LAN
- uf_ls_pay_schedule
- uf_ls_paysched_TEN

Data Cubes

FAM contains the following Data Cubes definitions:

- FAM Asset
- FAM Landlord Lease Schedule
- FAM Lease
- FAM Lease Active
- FAM Leases with Pay Schedule
- FAM Tenant Lease Schedule

FAM Business Process Types

The following BP 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:

- Shell
- Company

The FAM BPs are listed and accessible under the FAM Master Logs node if you have the applicable permissions:

- 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

- ▶ Building Configuration
- ▶ Employee
- ▶ Facility Master Service Agreement
- ▶ Index Rate
- ▶ Lease Contact
- ▶ LEED Certification Levels
- ▶ Occupancy Statuses
- ▶ PM Role

Cost Management

- ▶ Annual Budget
- ▶ Annual Budget Change
- ▶ Annual Budget Transfer
- ▶ Facility PO Amendment
- ▶ Facility PO Invoice
- ▶ Facility Purchase Order
- ▶ Work Order Cost
- ▶ Work Order Invoice

Asset Management

- ▶ Asset
- ▶ Asset Creator
- ▶ Asset Template
- ▶ Meter
- ▶ PM Book

Facilities Help Desk

- ▶ Service Request
- ▶ Space Request

Maintenance Management

- ▶ Corrective Work Order
- ▶ Job Plan
- ▶ PM Book Template
- ▶ Preventive Work Order
- ▶ Work Order Request

Materials Management

- ▶ Initial Inventory
- ▶ Inventory Adjustment
- ▶ Material Receipt
- ▶ Material SKUs Master
- ▶ Material Transfer In
- ▶ Material Transfer Out
- ▶ Material Used

Lease Management

- ▶ CAM Reconciliation
- ▶ Lease
- ▶ Lease Action
- ▶ Lease Amendment
- ▶ Lease Invoice
- ▶ Lease Payment
- ▶ Lease Request
- ▶ Lease Termination

Property Transaction

- ▶ Property Creation
- ▶ Property Disposition
- ▶ Property Selection
- ▶ Prospective Property

Property Data

- ▶ Deed
- ▶ Easement
- ▶ Parcel
- ▶ Property Tax
- ▶ Real Estate Payment

Energy and Sustainability

- ▶ Carbon Footprint
- ▶ Emission
- ▶ Energy Meter
- ▶ LEED Certification
- ▶ LEED Realized Benefit
- ▶ Recycling
- ▶ Waste Generation
- ▶ Water Meter

Condition Assessment

- ▶ Facility Inspection

Space Management

► Space Assignment

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

List of Cost type BPs

BP Name	BP ID	BP Level
Annual Budget	uxufab	Shell
Annual Budget Change	uxufabc	Shell
Annual Budget Transfer	uxufabt	Shell
CAM Reconciliation	uxuflscm	Shell
Facility Master Service Agreement	uxuffmsa	Shell
Facility Purchase Order	uxuffpo	Shell
Facility PO Amendment	uxufpoa	Shell
Facility PO Invoice	uxufinv	Shell
Lease Amendment	uxuflsar	Shell
Lease Invoice	uxuflsi	Shell
Lease Payment	uxuflsp	Shell
Lease	uxufls	Shell
Lease Request	uxuflsrq	Shell
Property Tax	uxufpt	Shell
Real Estate Payment	uxufrep	Shell
Work Order Cost	uxufwoc	Shell
Work Order Invoice	uxufwoi	Shell

Line Type BPs

List of Line Item type BPs

BP Name	BP ID	BP Level
Lease Contact	uxuflsc	Company

BP Name	BP ID	BP Level
Preventive Work Order	uxufpwo	Shell
Facility Inspection	uxuffi	Shell
Water Meter	uxufwm	Shell
Waste Generation	uxufwgn	Shell
Recycling	uxufrcy	Shell
Energy Meter	uxufemt	Shell
Carbon Footprint	uxufcf	Shell
PM Book Template	uxufpmbt	Shell
Property Selection	uxufpa	Shell
Employee	uxufemp	Shell
Asset Template	uxufastt	Shell
Asset	uxufast	Shell
Corrective Work Order	uxufcwo	Shell
Job Plan	uxuf	Shell
Material SKU Master	uxufmsm	Shell
Material Receipt	uxufmatr	Shell
Meter	uxufamtr	Shell
PM Book	uxufpmb	Shell
PM Role	uxufpmr	Shell
Initial Inventory	uxufiinv	Shell
Material Transfer Out	uxufmatt	Shell
Material Transfer In	uxufmati	Shell
Inventory Adjustment	uxufinva	Shell
Material Used	uxufmatu	Shell

Simple Type BPs

List of Simple type BPs

BP Name	BP ID	BP Level
Service Request	uxufsr	Company

BP Name	BP ID	BP Level
Work Order Request	uxufwor	Company
Deed	uxufded	Shell
Easement	uxufesm	Shell
Parcel	uxufpar	Shell
Space Assignment	uxufspa	Shell
Space Request	uxufsr	Company
Property Disposition	uxufpd	Shell
Prospective Property	uxufpp	Shell
Space Occupancy Statuses	uxufsos	Shell or Organization
Emission	uxufem	Shell
LEED Certification Levels	uxufldlv	Shell
LEED Certification	uxufledc	Shell
LEED Realized Benefit	uxulrb	Shell
Lease Action	uxuflsa	Shell
Lease Termination	uxuflst	Shell
Assets Creator	uxufastc	Shell
Index Rate	uxufidx	Shell
Building Configuration	uxufbc	Shell
Organization Configuration	uxufoc	Shell

Shell Creation Type BPs

List of Shell Creation type BPs

BP Name	BP ID	BP Level
Property Creation	uxufpcr	Shell

Dashboards

FAM contains the following dashboards:

Facility and Asset Management

Dashboard or Sub-Dashboard Name	Shell Template Location	Template Name
Assets tab <ul style="list-style-type: none">▶ Asset Class▶ Asset Purchase Price▶ Asset Work Orders▶ Asset Total Cost	Go to Templates , select Shells , and then select Buildings .	Oracle Building Template FAM

Lease Management

Dashboard or Sub-Dashboard Name	Shell Template Location	Template Name
Leases tab <ul style="list-style-type: none">▶ Lease by Class – Monthly Rents▶ Active Lease Annual Rent▶ Lease Amendments▶ Active Primary of Sub-lease Lease Payment Schedule <ul style="list-style-type: none">▶ Lifetime Tenant Payments▶ Total Tenant Payments▶ Lifetime Landlord Income▶ Total Invoiced	Go to Templates , select Shells , and then select Buildings .	Oracle Building Template FAM

Groups

FAM contains the following groups:

- ▶ Company-level Groups
 - ▶ Company Administrators
 - ▶ Facilities Help Desk
 - ▶ Portal Users
 - ▶ Vendor Coordinators
 - ▶ Vendors
- ▶ Shell-level Groups
 - ▶ All Internal Users
 - ▶ Facility Administrators

- Facilities Help Desk
- Facility Managers
- Finance
- Inventory Managers
- Property Managers
- Shop Supervisors
- Space Planners
- Technicians
- Vendors

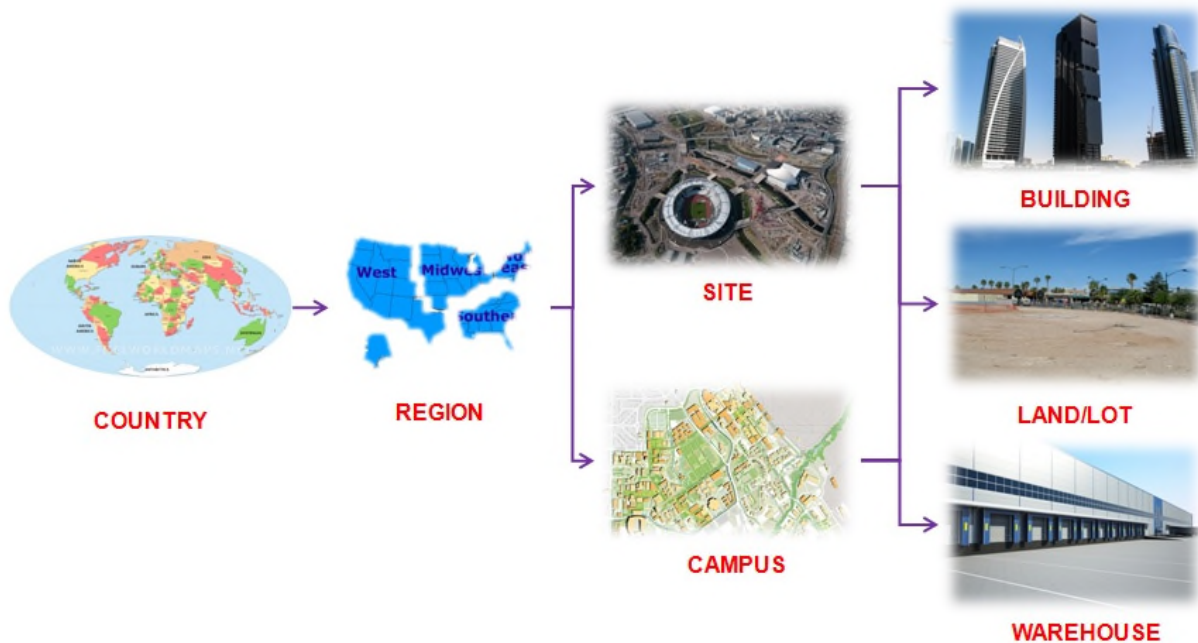
Shell Templates

FAM contains the following Shell Templates:

Shell Name	Shell Type
Oracle Building Template FAM	Buildings Shell type
ORACLE WAREHOUSE	Warehouse Shell type

Structure of FAM

Hierarchy Example



Structure for FAM

The structure for FAM consists of the following parts according to specific hierarchy needs:

- ▶ Organization
- ▶ Region/District
- ▶ Site/Campus
- ▶ Buildings
- ▶ Warehouse

Note:

- With the exception of the **Organization** tab, all other tabs (shells) must be created by you. You have the option to name the tabs according to your business needs. As 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 shell, based on the deployment of your user mode navigators.
-

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 FAM also includes Home and Company Workspace, which are discussed in the following sections.

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Home

The Home workspace enables you to review the following information:

- ▶ 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):

Note:

- 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 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
- ▶ E-Signatures
- ▶ Drafts
- ▶ Mailbox
 - ▶ Inbox
 - ▶ Notifications
 - ▶ Sent Items
- ▶ 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 BP records, across the entire portfolio:

- ▶ Annual Budget
- ▶ Annual Budget Change
- ▶ Annual Budget Transfer
- ▶ Asset
- ▶ Asset Creator
- ▶ Building Configuration
- ▶ CAM Reconciliation
- ▶ Carbon Footprint
- ▶ Corrective Work Order
- ▶ Deed
- ▶ Easement
- ▶ Emission
- ▶ Energy Meter
- ▶ Facility Inspection
- ▶ Facility Master Service Agreement
- ▶ Facility PO Amendment
- ▶ Facility PO Invoice
- ▶ Facility Purchase Order
- ▶ Initial Inventory
- ▶ Inventory Adjustment
- ▶ LEED Certification
- ▶ LEED Realized Benefit
- ▶ Lease
- ▶ Lease Action
- ▶ Lease Amendment
- ▶ Lease Invoice
- ▶ Lease Payment
- ▶ Lease Request
- ▶ Lease Termination
- ▶ Material Receipt
- ▶ Material Transfer In
- ▶ Material Transfer Out
- ▶ Material Used
- ▶ Meter
- ▶ PM Book
- ▶ Parcel
- ▶ Preventive Work Order

- ▶ Property Tax
- ▶ Real Estate Payment
- ▶ Recycling
- ▶ Waste Generation
- ▶ Water Meter
- ▶ Work Order Cost
- ▶ Work Order Invoice

Company Workspace

Company Workspace tab (Admin mode)

When you go to the **Company Workspace** tab and click your company name, the system displays the company landing page, which includes the **Company Information** page. On the **Company Information** page, you can view information such as the full and short name of the company, the applicable Uniform Resource Locators (URLs), the Base Currency, and various addresses.

The left Navigator contains the following nodes. For more information about these nodes and the various modules and submodules, see the *Unifier General Administration Guide*.

- ▶ Company Settings
- ▶ User Administration
- ▶ General Administration
- ▶ Data Structure Setup
- ▶ uDesigner
- ▶ Configuration
- ▶ Visualizations
- ▶ Integrations
- ▶ Standards & Libraries
- ▶ Configuration Package Management
- ▶ System Information
- ▶ Templates
- ▶ Company Workspace
- ▶ Company Sponsored Shells

Company Workspace (User mode)

When you switch to **User** mode, the right pane contains the following tabs:

- ▶ **General**
- ▶ **Summary**

The **General** tab is divided into two sections:

- ▶ The left section displays the following information:
 - ▶ Company name and image (if it exists in the **Company Information** page).
 - ▶ **Description**
 - ▶ **Administrator**

- ▶ **Home URL**

- ▶ **Help URL**

- ▶ **Addresses**

Other locations, if available, appear as grouping nodes in expanded mode below the first address, and the map picker displays the pin markers for all other locations.

- ▶ The right section displays the following information in multiple blocks:

- ▶ **Tasks**

- ▶ **Notifications**

- ▶ Company Workspace records: **Workflow Business Processes**

The Workflow BPs are all the workflow records for the user who has signed in. If the user who has signed in does not have access to any of the Workflow BPs at the Company Workspace level, the panes display a pertinent message. You can click the BP name to navigate to the respective BP log.

- ▶ Company Workspace records: **Non-Workflow Business Processes**

The Non-Workflow BPs are all the non-workflow records for the user who has signed in. If the user who has signed in does not have access to any of the Non-Workflow BPs at the Company Workspace level, the panes display a pertinent message. You can click the BP name to navigate to the respective BP log.

The **Summary** tab contains summary information displayed within custom or summary blocks. Similar to the **General** tab, you can add, edit, or delete custom and standard blocks.

The left Navigator in the Company Workspace tab (**User** mode) contains the following nodes, modules, and submodules.

- ▶ Summary
- ▶ Tasks
- ▶ E-Signatures
- ▶ Notifications
- ▶ Drafts
- ▶ General
- ▶ Cost Manager
 - ▶ Cash Flow
 - ▶ Cost Sheet
 - ▶ Funding
- ▶ Document Manager
 - ▶ Company Documents
 - ▶ Recycle Bin
 - ▶ Unpublished Documents
- ▶ Company Logs
 - ▶ User Requests
 - ▶ Vendor
- ▶ Facilities Help Desk
 - ▶ Service Request

- ▶ Space Request
- ▶ Work Order Request
- ▶ Company Lists and Pickers
 - ▶ Folder Template
 - ▶ Index Rate
 - ▶ Lease Contact
- ▶ Reports
 - ▶ User-Defined

Organization

Organization is at the top of the hierarchy for organizing your real estate portfolio. The Organization Shell is a part of Company Sponsored Shells. The **Shell Manager** (on page 18) section provides more details about the Organization Shell. The Organization tab may have been renamed to match your company name.

Organization tab (User mode)

You can use the **Organization** tab (**User** mode) to manage the properties by way of the following nodes, modules, sub-modules, and 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.

- ▶ Tasks
- ▶ Drafts
- ▶ Directory
- ▶ Mailbox
 - ▶ Inbox
 - ▶ Notifications
 - ▶ E-Signatures
 - ▶ Sent Items
 - ▶ Drafts
 - ▶ Deleted Items
- ▶ Project Mailbox
 - ▶ Alerts
- ▶ Information
 - ▶ General
- ▶ Document Manager & Submittals
 - ▶ Documents
 - ▶ Unpublished Documents
 - ▶ Recycle Bin
 - ▶ Bluebeam Studio Sessions

- ▶ Material Management
 - ▶ Material SKUs Master
- ▶ Employee Management (Org)
 - ▶ Employees
- ▶ Maintenance Management (Org)
 - ▶ PM Role
- ▶ Property Transactions
 - ▶ Prospective Property
 - ▶ Property Selection
 - ▶ Property Creation
 - ▶ Property Disposition
- ▶ FAM Templates (Org)
 - ▶ Asset Template
 - ▶ Job Plan
 - ▶ PM Book Template
 - ▶ LEED Certification Levels
 - ▶ Cost Manager (FAM)
- ▶ Move Add Change (MAC)
 - ▶ Space Assignment
- ▶ Reports
 - ▶ User-Defined

Organization tab (Admin mode)

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

- ▶ Member Companies
- ▶ Access Control
- ▶ User Administration
 - ▶ Users
 - ▶ Groups
 - ▶ Task Reassignment
 - Active User Tasks
 - Inactive User Tasks
- ▶ Setup
 - ▶ Business Process
 - ▶ Business Process Updates
 - ▶ Activity Sheets
 - ▶ Dashboards
 - ▶ Gates
 - ▶ Planning Manager

- ▶ Material Inventory Manager

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 18) 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 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.

- ▶ Tasks
- ▶ Drafts
- ▶ Directory
- ▶ Alerts
- ▶ Mailbox
 - ▶ Inbox
 - ▶ Notifications
 - ▶ E-Signatures
 - ▶ Sent Items
 - ▶ Drafts
 - ▶ Deleted Items
- ▶ Project Mailbox
 - ▶ Inbox
 - ▶ Unpublished Attachments
 - ▶ Alerts
- ▶ Information
 - ▶ General
- ▶ Document Manager & Submittals
 - ▶ Documents
 - ▶ Unpublished Documents
 - ▶ Recycle Bin
 - ▶ Bluebeam Studio Sessions
- ▶ Cost Manager (FAM)
 - ▶ Cost Manager (FAM)
 - ▶ Budget
 - Annual Budget
 - Annual Budget Change

- Annual Budget Transfer
- ▶ Lease
 - Lease Invoice
 - Lease Payment
- ▶ Property
 - Property Tax
 - Real Estate Payment
- ▶ Purchase Order
 - Facility Purchase Order
 - Facility PO Amendment
 - Facility PO Invoice
- ▶ Work Order
 - Work Order Invoice
 - Work Order Cost
- ▶ Assets
 - ▶ Asset Creator
 - ▶ Asset
 - ▶ Meter
 - ▶ PM Book
- ▶ Facility Condition Assessment
 - ▶ FCA Manager
 - ▶ Facility Inspection
- ▶ Lease
 - ▶ Lease Request
 - ▶ Lease
 - ▶ Lease Amendment
 - ▶ Lease Termination
 - ▶ Lease Action
 - ▶ CAM Reconciliation
- ▶ Maintenance Management
 - ▶ Corrective Work Orders
 - ▶ Preventive Work Orders
- ▶ Real Estate Data
 - ▶ Deed
 - ▶ Easement
 - ▶ Parcel
- ▶ Space
 - ▶ Level
 - ▶ Levels Sheet

- ▶ Stack Plans
- ▶ Boundary Area
- ▶ Major Vertical Penetration
- ▶ Other Rentable Exclusion
- ▶ Office Space
- ▶ Leasable Space
- ▶ Building Amenity Area
- ▶ Building Service Area
- ▶ Sustainability
 - ▶ LEED Certification
 - ▶ LEED Realized Benefit
- ▶ Utilities
 - ▶ Emission
 - ▶ Recycling
 - ▶ Energy Meter
 - ▶ Water Meter
 - ▶ Carbon Footprint
 - ▶ Waste Generation
- ▶ Reports
 - ▶ User-Defined

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 BPs:

- ▶ Member Companies
- ▶ Access Control
- ▶ User Administration
 - ▶ Users
 - ▶ Groups
 - ▶ Task Reassignment
 - Active User Tasks
 - Inactive User Tasks
- ▶ Setup
 - ▶ Business Process
 - ▶ Business Process Updates
 - ▶ Dashboards
 - ▶ Gates
 - ▶ Planning Manager
 - ▶ Material Inventory Manager

Warehouse

Warehouses can be added at any level in the shell hierarchy. The Warehouse Shell is a part of Company Sponsored Shells. The **Shell Manager** (on page 18) section provides more details about Warehouse manager.

Warehouse tab (User mode)

You can use the Warehouse tab (User mode) to manage warehouse locations by way of the following nodes, modules, sub-modules, and 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.

- ▶ Tasks
- ▶ Drafts
- ▶ Directory
- ▶ Mailbox
 - ▶ Inbox
 - ▶ Notifications
 - ▶ E-Signatures
 - ▶ Sent Items
 - ▶ Drafts
 - ▶ Deleted Items
- ▶ Project Mailbox
 - ▶ Alerts
- ▶ Information
 - ▶ General
- ▶ Document Manager & Submittals
 - ▶ Documents
 - ▶ Unpublished Documents
 - ▶ Recycle Bin
- ▶ Material Management
 - ▶ Material Inventory Manager
 - ▶ Sheets
 - ▶ Initial Inventory
 - ▶ Inventory Adjustment
 - ▶ Material Receipt
 - ▶ Material Transfer In
 - ▶ Material Transfer Out
 - ▶ Material Used
- ▶ Reports
 - ▶ User-Defined

Warehouse tab (Admin mode)

You can use the Warehouse tab (Admin mode) to manage warehouse locations by way of the following nodes, modules, sub-modules, and BPs:

- ▶ Member Companies
- ▶ Access Control
- ▶ User Administration
 - ▶ Users
 - ▶ Groups
 - ▶ Task Reassignment
 - Active User Tasks
 - Inactive User Tasks
- ▶ Setup
 - ▶ Business Process
 - ▶ Business Process Updates
 - ▶ Dashboards
 - ▶ Gates
 - ▶ Planning Manager
 - ▶ Material Inventory 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 (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 Organization Single Record Business Process (BP). (See **Modifying the Organization 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.

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Modifying the Organization Single Record

Use the Organization Single Record Business Process (BP) to select the default values for Organization-level processes.

To select the Organization Single Record:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **General**.
- 3) From the **General** log, select **Organization Configuration** and click **Open**.
- 4) Click **Edit**.
- 5) Fill out publish paths and other default values for Organization-level processes.
For more information, use the tooltips on the form.
- 6) Click **Submit**.

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 BPs.

To select the space occupancy statuses:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **General**.
- 3) From the **General** log, select **Space Occupancy Statuses** and click **Open**.
- 4) Click **Edit**, and use the table below to select default values.
- 5) Click **Submit**.

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
Status	Active

Modifying the Building Configuration Single Record

Use the Building Configuration Single Record Business Process (BP) to select the default values for Building- and Warehouse-level processes.

To select the Building Configuration Single Record:

- 1) Go to the **Company Workspace** tab and switch to **User** mode.
- 2) In the left Navigator, select **Templates**, select **Shells**, select **Buildings**, select **Oracle Building Template FAM**, select **Information**, and then select **General**.
- 3) From the **General** log, select **Building Configuration** and click **Open**.
- 4) Click **Edit**.
- 5) Fill out publish paths and other default values for Building- and Warehouse-level processes. For more information, use the tooltips on the form.
- 6) Click **Submit**.

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 BPs to match corporate workflow.
- ▶ Manage a single property or 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 (BOMA) standards for Net Leasable Space calculations.
- ▶ 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 receipts
- ▶ Material transfers
- ▶ Material adjustments
- ▶ Space management
- ▶ Stack Plan diagrams
- ▶ Facility inspections and condition assessment
- ▶ Templates for fast setup and deployment
- ▶ Advanced reporting and dashboards
- ▶ Detailed audit log

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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 populates 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 Template**.

After the asset creation is submitted, the actual Asset record is autocreated 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 Template

The Asset Template is 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, the Asset Template is used by the Asset Creator process.

Assets by Type

You can organize assets by type, manufacturer, or other attributes in the Assets Log.

Note: Predefined log views can be set up and shared by the administrator, or users may define their own log views.

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 Inspection Lead Time is an additional field that enables you to specify the number of days before the warranty expires.

Asset Meters

Asset meters are 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 triggers 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
Asset	uxufast	Shell
Asset Creator	uxufastc	Shell

BP Name	BP ID	BP Level
Asset Template	uxufastt	Shell
Meters	uxufamtr	Shell

Asset Business Process

Purpose

Use the Asset BP to record attributes of a physical asset. Sub-components and related gauges and meters are recorded on line items. Corrective and Preventive work order history tabs are available.

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

Level

Shell

Type

Line Item

Workflow


The Asset BP is a non-workflow BP.

Record Statuses

- ▶ Commissioning
- ▶ Disposed
- ▶ In_Service
- ▶ Installed
- ▶ On_Site
- ▶ Under_Maintenance

Create

To create an Asset BP:

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

Asset Creator Business Process

Purpose

The Asset Creator process simplifies and automates the creation of asset records and all related objects. During asset creation process, the user populates 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 autocreated 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).

Level

Shell

Type

Simple

Record Statuses

Completed

Groups Associated with this BP

Facility Administrators can create assets.

Workflow

The Asset Creator BP has a workflow that goes directly from Creation to End. Additional steps may be added for collaboration or approval by an administrator in uDesigner.

Create

To create an Asset Creator BP:

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

Asset Template Business Process**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.

Level

Shell

Type

Line Item

Record Statuses

- ▶ Active
- ▶ Inactive

Groups Associated with this BP

Facility Administrators can create and edit asset templates.

Workflow

The Asset Template is a non-workflow BP.

Create

To create an Asset Template BP:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **FAM Templates (Org)**, and then select **Asset Template**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
- 5) Select the **Gauges and Meters** and **Components** tabs.
 - a. Click **Add**.
 - b. Enter the required information.
- 6) To save the asset template, click **Submit**.

Meter Business Process

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 triggers work orders automatically and based on the latest meter reading.

Level

Shell

Type

Line Item

Record Statuses

- ▶ Active
- ▶ Inactive

Groups Associated with this BP


Facility Administrators can create and edit meters.

Workflow

The Meter BP is a non-workflow BP.

View

To view Meter records:

- 1) Go to the shell tab (for example, Building) where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Assets**, and then select **Meter**.
- 3) In the BP log, select the record you want to view and click  > **Open**.

Note: When an Asset has a status of In_Service, a Meter record is generated by a Gauges and Meters line item on the Asset. The Asset line item includes a link to the associated Meter.

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 Unifier Accelerator with Facilities and Asset Management include 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 receipts, material transfers, material adjustments, and so on.

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, mobile application, or via automated e-mails.

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 Transfers
- ▶ Material Receipt
- ▶ Material Used

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

Service Requests

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

The 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.

Select fields are updated by the Work Order Request and Corrective Work Order resulting from a Service Request so that Portal Users can monitor the progress of a reported issue.

Work Order Requests

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

Members of the Facilities Help Desk group can review the Work Order Request generated from the Service Request 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 location 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 Orders 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 templates for the list of tasks and materials 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.

Preventive Maintenance (PM) Books

PM Books hold details on specific maintenance activities, such as when and how Preventive Work Orders (PWOs) 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 acts as the library of all material used for material inventory and maintenance management. The Material SKU Master provides the details for each type of material or 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 Manager is a list of materials at a particular location or 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 received, when material is consumed by work orders, and when manual inventory transfers and adjustments are made.

Materials Receipt

The Material Receipt process is used to confirm the delivery and receipt of materials that have been ordered from a vendor.

After the material received is approved, the Material Inventory quantities and average unit price are 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 Order (CWO)	uxufcwo	Shell
Preventive Work Order (PWO)	uxufpwo	Shell
Job Plan	uxufjopl	Shell
Material SKUs Master	uxufmsm	Shell
PM Book Template Note: PM stands for Preventive Maintenance.	uxufpmbt	Shell
PM Book Note: PM stands for Preventive Maintenance.	uufpmb	Shell
Initial Inventory	uxufiinv	Shell
Inventory Adjustment	uxufinva	Shell
Material Receipt	uxufmatr	Shell
Material Transfer In	uxufmati	Shell
Material Transfer out	uxufmatt	Shell
Material Used	uxufmatu	Shell

Maintenance Management Simple Type BPs

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

BP Name	BP ID	BP Level
Service Request	uxufsr	Company
Work Order Request	uxufwor	Company

Corrective Work Order (CWO) Business Process

Purpose

Corrective Work Order (CWO) BPs 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 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 or problem. CWOs are routed to the different parties involved via a default (yet configurable) BP workflow as shown below. Assigned technicians are required to complete the list of tasks performed, actual time spent on each task, and list of materials used and quantities used to complete the tasks.

Level

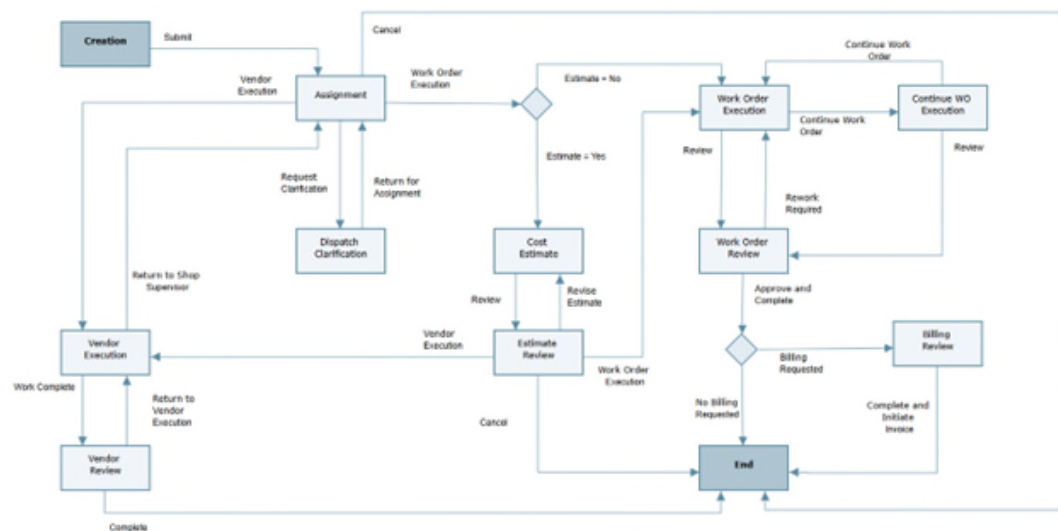
Shell

Type

Line Item


Workflow

Figure 1: This is an image of the business process workflow.



View

To create a Corrective Work Orders BP:

- 1) Go to the shell tab (for example, Building) 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 Order**.
- 3) In the BP log, select the record you want to view and click  > **Open**.

Preventive Work Orders (PWO) Business Process

Purpose

Preventative Work Orders (PWO) 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 and materials.

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

Level

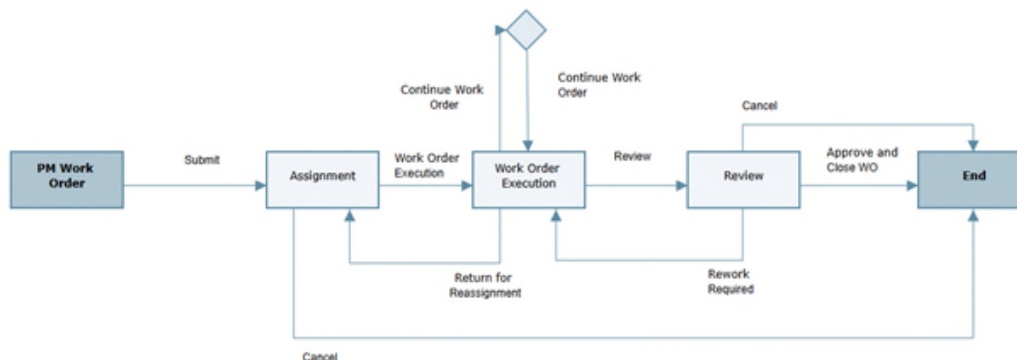
Shell

Type

Line Item


Workflow

Figure 2: This is an image of the business process workflow.



View

To view a Preventive Work Orders (PWO) BP:

- 1) Go to the shell tab (for example, Building) 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 Order**.
- 3) In the BP log, select the record you want to view and click  > **Open**.

Initial Inventory Business Process

Purpose

Use the Initial Inventory BP to update a Warehouse Inventory Manager with the initial material quantity and cost.

Level

Shell

Type


Line Item

Record Statuses

- ▶ Approved
- ▶ Canceled
- ▶ Rejected
- ▶ Review
- ▶ Revision

View

To view an Initial Inventory BP:

- 1) Go to the shell tab (for example, Warehouse) where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Material Management**, and then select **Initial Inventory**.
- 3) In the BP log, select the record you want to view and click  > **Open**.

Inventory Adjustment Business Process

Purpose

Use the Inventory Adjustment BP to reconcile expected inventory with actual count.

Level

Shell

Type


Line Item

Record Statuses

- ▶ Approved
- ▶ Canceled
- ▶ Rejected
- ▶ Review
- ▶ Revision

View

To view an Inventory Adjustment BP:

- 1) Go to the shell tab (for example, Warehouse) where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Material Management**, and then select **Inventory Adjustment**.
- 3) In the BP log, select the record you want to view and click  > **Open**.

Material Receipt Business Process

Purpose

Use the Material Receipt BP to update a Warehouse Inventory Manager with material received without a Purchase Order in the system.

Level

Shell

Type


Line Item

Record Statuses

- ▶ Approved
- ▶ Canceled
- ▶ Rejected
- ▶ Review
- ▶ Revision

View

To view a Material Receipt BP:

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

Material Transfer In Business Process

Purpose

The Material Transfer In BP is generated when material is transferred into the warehouse.

Level

Shell

Type


Line Item

Record Statuses

- ▶ Approved
- ▶ Canceled
- ▶ Rejected
- ▶ Review
- ▶ Revision

View

To view a Material Transfer In BP:

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

Material Transfer Out Business Process

Purpose

Use the Material Transfer Out BP to transfer material from one Warehouse to another.

Level

Shell

Type


Line Item

Record Statuses

- ▶ Approved
- ▶ Canceled
- ▶ Rejected
- ▶ Review
- ▶ Revision

View

To view a Material Transfer Out BP:

- 1) Go to the shell tab (for example, Warehouse) where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Material Management**, and then select **Material Transfer Out**.
- 3) In the BP log, select the record you want to view and click  > **Open**.

Material Used Business Process

Purpose

The Material Used BP is generated when material is used for a Corrective or Preventive work order. This record updates the Inventory Manager.

Level

Shell

Type


Line Item

Record Statuses

- ▶ Approved
- ▶ Canceled
- ▶ Rejected
- ▶ Review
- ▶ Revision

View

To view a Material Used 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 Used**.
- 3) In the BP log, select the record you want to view and click  > **Open**.

Job Plan Business Process

Purpose

Use the Job Plan BP as a template for labor and tasks, materials and tools required for maintenance work on a related asset or facility.

Workflow

The Job Plans BP is a non-workflow BP.

Create

To create job plans:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **FAM Templates (Org)**, and then select **Job Plan**.
- 3) In the BP log, click **Create**.
- 4) Select the **Tasks & Labor**, **Materials**, **Components**, and **Other Costs** tabs.
 - a. Click **Add**.
 - b. Enter the required information.
- 5) To save the Job Plan, click **Submit**.

Material SKUs Master Business Process

Purpose

The Material SKU Master is the library of all stocked material used for material inventory and maintenance management.

Level

Shell

Type

Line Item

Workflow

The Material SKUs Master BP is a non-workflow BP.

View

To view the Material SKUs Master BP:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **Material Management**, and then select **Material SKUs Master**.

PM Book Template Business Process

Purpose

Use the PM Book Template BP to create PM Books appropriate for associated Assets.

Level

Shell

Type

Line Item

Workflow

The PM Book Template BP is a non-workflow BP.

Create

To create a PM Book template:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **FAM Templates (Org)**, and then select **PM Book Template**.
- 3) In the BP log, click **Create**.
Complete the form.
- 4) Select the **Scheduled PM**, **Gauge Triggered PM**, and **Meter Triggered PM** tabs.
 - a. Click **Add**.
 - b. Enter the required information.
- 5) To save the PM Book Template, click **Submit**.

PM Book Business Process

Purpose

Use the PM Book BP to manage specific maintenance activities for preventive work orders, including a related job plan, the work order generation schedule, and associated meters and gauges.

Level

Shell

Type

Line Item


Workflow

The PM Books BP is a non-workflow BP.

View

To view a PM Book BP:

- 1) Go to the shell tab (for example, Building) where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Assets**, and then select **PM Book**.

- 3) In the BP log, select the record you want to view and click  > **Open**.

Service Request Business Process

Purpose

Use the Service Request BP to request maintenance activity on a facility or asset and monitor progress on the resulting Work Order.

Level

Company

Type

Simple

Workflow

The Service Requests BP is a non-workflow BP.

View

The 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.

Create

To create a Service 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 **Service Request**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
- 5) Click **Submit**.

Work Order Request Business Process

Purpose

The Work Order Request BP is autogenerated by a Service Request for consideration to create a Corrective Work Order. A Work Order Request may also be created manually by an internal user.

Level

Company

Type

Simple

Record Statuses

- ▶ CWO_Submitted
- ▶ Duplicate
- ▶ Pending
- ▶ Rejected

View

To view a Work Order Request BP:

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

Facilities: Space Management

Building owners and investors want to ensure spaces are managed well and tenants are charged a fair rate based on amenities available to them.

The Space Management feature is aligned with the Building Owners and Managers Association (BOMA) 17 standards. BOMA standards have space designations — some of which are measured and some of which are calculated. For example, the overall area of a floor can be measured using the floor dimensions and so can the sizes of specific offices. Corridor, landing, and other spaces can then be easily calculated.

Space Planning Classifications

The Space Planning feature consists of the following space types in alignment with BOMA 17.

- 1) **Level Name:** The floor of a building
- 2) **Boundary Area (PMS2):** The boundary of rentable space, typically defined by exterior walls or other physical boundaries.
- 3) **Major Vertical Penetration:** A floor opening that serves vertical building systems or vertical occupant circulation functions.
- 4) **Other Rentable Exclusion:** Spaces that are not part of the rentable areas and are not included in the calculation of rent or other lease related expenses. Examples: mechanical rooms, structural elements.
- 5) **Rentable Exclusion:** Calculated. *(Major Vertical Penetration + Other Rentable Exclusion)*
- 6) **Floor Rentable Area:** Calculated. *(Boundary Area – Rentable Exclusion)*
- 7) **Office Space:** Space for internal employees designated by the Assignment BP. Owners not occupying the space will have only leasable Occupant Area.
- 8) **Leasable Space:** Space within a building that can be leased by a tenant for their exclusive use.
- 9) **Occupant Area:** Calculated. *(Office Space + Leasable Space)*
- 10) **Building Amenity Area:** Space within a building intended to enhance the experience of the building's occupants. Not part of any tenant's exclusive space.
- 11) **Floor Usable Area:** Calculated. *(Occupant Area + Building Amenity Area)*

- 12) **Building Service Area:** Spaces dedicated to the operation, maintenance and support of building systems, equipment and infrastructure that are excluded from leasable space. Examples: mechanical rooms, janitorial areas, security rooms.
- 13) **Floor Service Area:** Calculated. *(Floor Rentable Area + Floor Usable Area + Building Service Area)*
- 14) **Floor R/U Ratio:** Calculated. *(Floor Usable Area + Floor Common Area) / Floor Usable Area*
- 15) **Building Allocation Ratio:** Calculated. *Total Floor Rentable Area / (Total Floor Rentable Area – Total Building Amenity Area – Total Building Service Area)*

The Space Manager feature provides a flexible and configurable solution to create, classify, and organize building floors and spaces by types as listed above.

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

The configurable Stacking Plans capability provides a visual representation of an entire facility or building, broken down by floor or level, to show how much space is used, by using various parameters, such as Department, Vacancy, Type, and so on.

Space management enables you to manage:

- ▶ Space Planning Classifications
- ▶ Stacking Plans
- ▶ Space Requests & Assignments

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

Stack Plans

A stack 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 or occupied), departments or companies occupying the floor, and so on. As a default, the solution comes with a preconfigured stack plan for space by type.

Space Requests & Assignments

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

Space Requests can include the desired space type, size, location, building, and so forth. Once submitted, a Space Assignment is autogenerated in the Organization tab. Once reviewed, a space can then be assigned to the requester. The Office Area space type is available for assignment and reservation.

Space Management Business Processes (BPs)

Space Management Simple Type BPs

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

BP Name	BP ID	BP Level
Space Assignment	uxufspa	Shell
Space Request	uxufsrq	Company

Space Assignment Business Process

Purpose

Use the Space Assignment BP to assign an employee to a space. This record may be autogenerated by an approved Space Request.

Level

Shell

Type

Simple

Record Statuses

- ▶ Assigned
- ▶ Canceled
- ▶ Pending
- ▶ Rejected

Groups Associated with this BP

Facility Managers, Facility Administrators, and Property Managers

Create

To work with a Space Assignment BP:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **Move Add Change (MAC)**, and then select **Space Assignment**.
- 3) Select the space assignment BP record to open.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) From the **Workflow Actions** menu, select **Send**.

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 so on). 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 features 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 facility condition index (FCI).

The facility inspection process provides the technician and 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. Other code structures may be configured by a Unifier Administrator.

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 Assessment (FCA) Manager

The Facility Condition Assessment (FCA) Manager houses the data attained from facilities inspection and calculates the FCI for each facility individually, or for all facilities together.

Condition Assessment Business Processes (BPs)

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

BP Name	BP ID	BP Level
Facility Inspection	uxuffi	Shell

The following *Manager* is available for Condition Assessment Management:

BP Name	BP ID	BP Level
FCA Manager	uxuffca	Code-based

Real Estate Management

The Real Estate Management component 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 BPs to match corporate standards and processes.
- ▶ Organize your portfolio based on business practices—by region, by type, and so on.
- ▶ Manage a single property or facility or an entire portfolio.
- ▶ Gain visibility into all real estate information across the entire portfolio.
- ▶ Track strategic transactions, such as site or property acquisitions, dispositions, lease renewals, and so on.
- ▶ Manage market transaction types, such as acquisitions, dispositions, and financing.

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 payments 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

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Real Estate: Lease 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 so on. 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.

The Lease Management functionality is integrated with the Space Management functionality for leasing of spaces within a building or property.

Common Use Cases

The following are common scenarios for using the Lease Management functionality:

- ▶ An owner purchases a property for investment and rents out tenant spaces within the property to various businesses.
- ▶ An investor leases a property, makes some improvements and sub leases spaces to various tenants.
- ▶ A business purchases a property for its own offices

List of Business Processes

The following Lease business processes (BPs) are included in the Lease Management feature. Additional processes can be configured based on client requirements.

- ▶ Lease Request
- ▶ Lease
- ▶ Lease Contact
- ▶ CAM (Common Area Maintenance) Reconciliation
- ▶ Lease Action
- ▶ Lease Amendment
- ▶ Lease Invoice
- ▶ Lease Payment
- ▶ Lease Termination

Lease Request

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

Lease

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 related to a commercial lease, but are 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 or 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.

Someone may lease an entire building or tenant spaces within a building.

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.

The lease process automates the monthly payment and billing process through system autogenerated Lease Payment and Lease Invoice BPs.

The Key Dates detail tab in the Lease BP supports the ability to automate action items and assignments on critical events, such as Lease Renewals, Option Exercise Dates, and so forth.

Lease Contact

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

CAM Reconciliation

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

For Landlords, it serves as a way to determine whether tenants still owe any additional CAM charges. 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 invoicing the tenants.

Lease Action

Lease Action is a BP record that is autogenerated from the Lease record for Critical Dates that require an action or task and follow up from someone assigned this action.

Lease Amendment

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

A Lease Amendment is initiated from within the original Lease record. Once initiated, a Lease Amendment record is autogenerated and routed for review and approval. Once approved, the process does two things:

- ▶ The status of the original Lease record changes to “Amended”
- ▶ Another Lease record is created, which contains the amended or modified data.

The newly created lease record is marked as Active, and the Amendment Number field is updated. The Primary Lease Number remains the same.

Lease Invoice

A Lease Invoice is 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 includes a reference to the Lease record that generated it, and line items are automatically populated with the relevant charge type and amount. The Lease Invoice is then routed for review and approval.

Lease Payment

A Lease Payment record is 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. The Lease Payment is then routed for review and approval.

Lease BP Payment Schedule

Changes to Lease Payment Terms are 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
04/01/2025	04/30/2025	04/01/2025	GTO	\$1,000.00	\$1,000.00	
05/01/2025	05/31/2025	05/01/2025	GTO	\$1,000.00	\$1,000.00	
06/01/2025	06/30/2025	06/01/2025	GTO	\$1,000.00	\$1,000.00	
07/01/2025	07/31/2025	07/01/2025	GTO	\$1,000.00	\$1,000.00	
08/01/2025	08/31/2025	08/01/2025	GTO	\$1,000.00	\$1,000.00	
09/01/2025	09/30/2025	09/01/2025	GTO	\$1,000.00	\$1,000.00	
10/01/2025	10/31/2025	10/01/2025	GTO	\$1,000.00	\$1,000.00	
11/01/2025	11/30/2025	11/01/2025	GTO	\$1,000.00	\$1,000.00	
12/01/2025	12/31/2025	12/01/2025	GTO	\$1,000.00	\$1,000.00	
01/01/2026	01/31/2026	01/01/2026	GTO	\$1,000.00	\$1,000.00	
02/01/2026	02/28/2026	02/01/2026	GTO	\$1,000.00	\$1,000.00	
03/01/2026	03/31/2026	03/01/2026	GTO	\$1,100.00	\$1,100.00	First year escalation
04/01/2026	04/30/2026	04/01/2026	GTO	\$1,100.00	\$1,100.00	
05/01/2026	05/31/2026	05/01/2026	GTO	\$1,100.00	\$1,100.00	
06/01/2026	06/30/2026	06/01/2026	GTO	\$1,100.00	\$1,100.00	
07/01/2026	07/31/2026	07/01/2026	GTO	\$1,100.00	\$1,100.00	
08/01/2026	08/31/2026	08/01/2026	GTO	\$1,100.00	\$1,100.00	
09/01/2026	09/30/2026	09/01/2026	GTO	\$1,100.00	\$1,100.00	
10/01/2026	10/31/2026	10/01/2026	GTO	\$1,100.00	\$1,100.00	
11/01/2026	11/30/2026	11/01/2026	GTO	\$1,100.00	\$1,100.00	
12/01/2026	12/31/2026	12/01/2026	GTO	\$1,100.00	\$1,100.00	
01/01/2027	01/31/2027	01/01/2027	GTO	\$1,100.00	\$1,100.00	
02/01/2027	02/28/2027	02/01/2027	GTO	\$1,100.00	\$1,100.00	
03/01/2027	03/31/2027	03/01/2027	GTO	\$1,210.00	\$1,210.00	Second year

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
						escalation
04/01/2027	04/30/2027	04/01/2027	GTO	\$1,210.00	\$1,210.00	
05/01/2027	05/31/2027	05/01/2027	GTO	\$1,210.00	\$1,210.00	
06/01/2027	06/30/2027	06/01/2027	GTO	\$1,210.00	\$1,210.00	
07/01/2027	07/31/2027	07/01/2027	GTO	\$1,210.00	\$1,210.00	
08/01/2027	08/31/2027	08/01/2027	GTO	\$1,210.00	\$1,210.00	
09/01/2027	09/30/2027	09/01/2027	GTO	\$1,210.00	\$1,210.00	
10/01/2027	10/31/2027	10/01/2027	GTO	\$1,210.00	\$1,210.00	
11/01/2027	11/30/2027	11/01/2027	GTO	\$1,210.00	\$1,210.00	<i>Index Rate switched or rate changed (27 November 2023)</i>
12/01/2027	12/31/2027	12/01/2027	GTO	\$1,210.00	\$1,210.00	
01/01/2028	01/31/2028	01/01/2028	GTO	\$1,210.00	\$1,210.00	
02/01/2028	02/29/2028	02/01/2028	GTO	\$1,210.00	\$1,210.00	
03/01/2028	03/31/2028	03/01/2028	GTO	\$1,331.00	\$1,452.00	Third year escalation
04/01/2028	04/30/2028	04/01/2028	GTO	\$1,331.00	\$1,452.00	
05/01/2028	05/31/2028	05/01/2028	GTO	\$1,331.00	\$1,452.00	
06/01/2028	06/30/2028	06/01/2028	GTO	\$1,331.00	\$1,452.00	
07/01/2028	07/31/2028	07/01/2028	GTO	\$1,331.00	\$1,452.00	
08/01/2028	08/31/2028	08/01/2028	GTO	\$1,331.00	\$1,452.00	
09/01/2028	09/30/2028	09/01/2028	GTO	\$1,331.00	\$1,452.00	
10/01/2028	10/31/2028	10/01/2028	GTO	\$1,331.00	\$1,452.00	
11/01/2028	11/30/2028	11/01/2028	GTO	\$1,331.00	\$1,452.00	
12/01/2028	12/31/2028	12/01/2028	GTO	\$1,331.00	\$1,452.00	
01/01/2029	01/31/2029	01/01/2029	GTO	\$1,331.00	\$1,452.00	

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
02/01/2029	02/28/2029	02/01/2029	GTO	\$1,331.00	\$1,452.00	
03/01/2029	03/31/2029	03/01/2029	GTO	\$1,464.10	\$1,742.40	Fourth year escalation
04/01/2029	04/30/2029	04/01/2029	GTO	\$1,464.10	\$1,742.40	
05/01/2029	05/31/2029	05/01/2029	GTO	\$1,464.10	\$1,742.40	
06/01/2029	06/30/2029	06/01/2029	GTO	\$1,464.10	\$1,742.40	
07/01/2029	07/31/2029	07/01/2029	GTO	\$1,464.10	\$1,742.40	
08/01/2029	08/31/2029	08/01/2029	GTO	\$1,464.10	\$1,742.40	
09/01/2029	09/30/2029	09/01/2029	GTO	\$1,464.10	\$1,742.40	
10/01/2029	10/31/2029	10/01/2029	GTO	\$1,464.10	\$1,742.40	
11/01/2029	11/30/2029	11/01/2029	GTO	\$1,464.10	\$1,742.40	
12/01/2029	12/31/2029	12/01/2029	GTO	\$1,464.10	\$1,742.40	
01/01/2030	01/31/2030	01/01/2030	GTO	\$1,464.10	\$1,742.40	
02/01/2030	02/28/2030	02/01/2030	GTO	\$1,464.10	\$1,742.40	
03/01/2030	03/31/2030	03/01/2030	GTO	\$1,610.51	\$2,090.88	Fifth year escalation
04/01/2030	04/30/2030	04/01/2030	GTO	\$1,610.51	\$2,090.88	
05/01/2030	05/31/2030	05/01/2030	GTO	\$1,610.51	\$2,090.88	
06/01/2030	06/30/2030	06/01/2030	GTO	\$1,610.51	\$2,090.88	
07/01/2030	07/31/2030	07/01/2030	GTO	\$1,610.51	\$2,090.88	
08/01/2030	08/31/2030	08/01/2030	GTO	\$1,610.51	\$2,090.88	
09/01/2030	09/30/2030	09/01/2030	GTO	\$1,610.51	\$2,090.88	
10/01/2030	10/31/2030	10/01/2030	GTO	\$1,610.51	\$2,090.88	
11/01/2030	11/30/2030	11/01/2030	GTO	\$1,610.51	\$2,090.88	
12/01/2030	12/31/2030	12/01/2030	GTO	\$1,610.51	\$2,090.88	
01/01/2031	01/31/2031	01/01/2031	GTO	\$1,610.51	\$2,090.88	
02/01/2031	02/28/2031	02/01/2031	GTO	\$1,610.51	\$2,090.88	

Lease Termination

The 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:

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

Lease Management Business Processes (BPs)

Lease Management Cost Type BPs

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

BP Name	BP ID	BP Level
Lease Request	uxuflsrq	Shell
Lease	uxufls	Shell
Lease Amendment	uxuflsar	Shell
Lease Invoice	uxuflsi	Shell
Lease Payment	uxuflsp	Shell
CAM Reconciliation	uxuflscm	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 Contact	uxuflsc	Company

Leases Management Simple Type BPs

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

BP Name	BP ID	BP Level
Lease Action	uxuflsa	Shell
Lease Termination	uxuflst	Shell

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 Summary	NA	Lease	Tabular

Real Estate: Transaction 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 so on. 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. 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 Selection
- ▶ Property Disposition
- ▶ Property Creation

Note: Information about the Property Transaction Management business processes (BPs) is provided below.

Prospective Property

Identifying 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 selection process to select the best property that meets the criteria.

Property Selection

Property selection is a process used for specifying the needs and criteria related to a real estate acquisition transaction. In this process, each criterion 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 according to acquisition needs and criteria.

The information collected during this process is used to automatically 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 process is included to complete the transaction and include the property in the real estate portfolio by automatically creating the property and placing it in the proper location in the overall real estate portfolio hierarchy.

Property Disposition

The Property Disposition process is used when a property is disposed or sold and is no longer part of the portfolio. The process allows the requestor to submit a request and specify the 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/Sold.”

Property Creation

Use the Property Creation BP to create a new property. This record may be autogenerated by an approved Property Acquisition record.

Property Transaction Business Processes (BPs)

Property Transaction Line Item BPs

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

BP Name	BP ID	BP Level
Property Selection	uxufpa	Shell

Property Transaction Simple Type BPs

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

BP Name	BP ID	BP Level
Prospective Property	uxufpp	Shell
Property Disposition	uxufpd	Shell
Property Creation	uxufpcr	Shell

Prospective Property Business Process

Purpose

Use the Prospective Property BP to capture details of a property that could be considered for acquisition.

Level

Shell

Type

Simple

Workflow

The Prospective Property BP is a non-workflow BP.

Record Statuses

- ▶ Considered
- ▶ Acquired
- ▶ Available

Groups Associated with this BP

Facility Administrators, Facility Managers, and Property Managers

Create

To create a Prospective Property BP:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **Property Transactions**, and then select **Prospective Property**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) Click **Submit**.

Property Selection Business Process

Purpose

Use the Property Selection BP to collect information and automatically calculate a score for each property under consideration.

Level

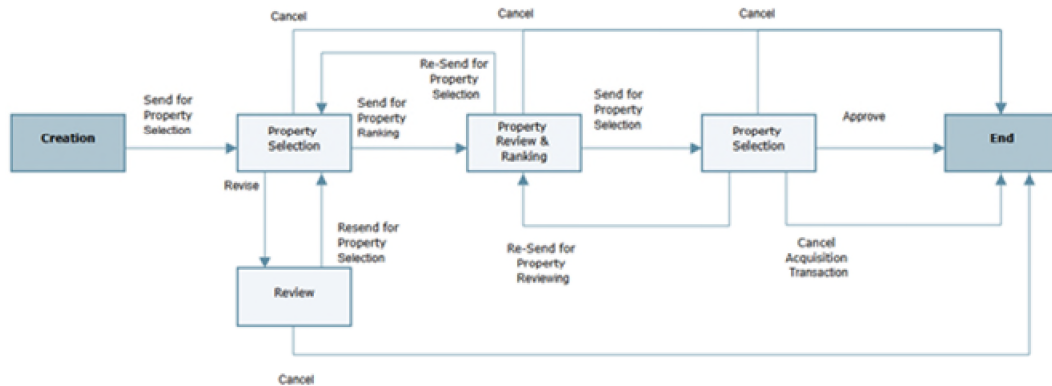
Shell

Type

Line Item

Workflow

Figure 3: This is an image of the business process workflow.



Record Statuses

- ▶ Pending
- ▶ Approved
- ▶ Canceled
- ▶ Rejected

Groups Associated with this BP

Property Managers

Create

To create a Property Selection BP:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **Property Transactions**, and then select **Property Selection**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) From the **Workflow Actions** menu, select **Send for Property Selection**.

Property Disposition Business Process

Purpose

Use the Property Disposition BP to manage property disposition.

Level

Shell

Type

Simple

Record Statuses

- ▶ Pending

- ▶ Approved
- ▶ Rejected
- ▶ Canceled
- ▶ On-hold

Groups Associated with this BP

Property Managers, Facility Managers, Facility Administrators

Create

To create a Property Dispositions BP:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **Property Transactions**, and then select **Property Disposition**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) From the **Workflow Actions** menu, select **Submit** or **Approve without Review**.

Property Creation Business Process

Purpose

The Property Creation BP is used to initiate the creation of a new Building shell as a result of a Property Selection approved transaction. The Property Creation BP is typically assigned to a user or a group responsible for the creation of new shells in the portfolio.

Level

Shell

Type

Shell Creation

Record Statuses

- ▶ Approved
- ▶ In_Review
- ▶ Rejected
- ▶ Canceled
- ▶ Sent_for_Revision
- ▶ Pending_Approval

Groups Associated with this BP

Facility Administrators, Facility Managers, Property Managers

Create

Property Creation records are typically autocreated by a Property Selection BP. A Property Creation may be created manually.

To create a Property Creation BP:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **Property Transactions**, and then select **Property Creation**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) From the **Workflow Actions** menu, select **Submit** or **Approve without Review**.

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:

- ▶ Parcel
- ▶ Deed
- ▶ Easement
- ▶ Property Tax
- ▶ Real Estate Payment

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.

Deed

Use the Deed BP 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

Use the Easement BP to capture data related to property easements, such as Easement Type, Considerations, and so forth.

Parcels

Use the Parcel BP to capture data related to property parcels, such as Parcel Number, Parcel Size, Legal Description, Parcel Map/Image, Parcel Category and type, Zoning, and so forth.

Property Tax

Use the Property Tax BP to track property tax payments, including Tax Type, Amount, Parcel Number, Address, Payee Name, and so forth. Transactions are captured on line items.

Real Estate Payment

Use the Real Estate Payment BP to generate property-related payments not associated to a Lease or Facility Purchase Order. Line items track allocation and payment details.

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 Tax	uxufpt	Shell
Real Estate Payment	uxufrep	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
Deeds	uxufded	Shell
Easement	uxufesm	Shell
Parcel	uxufpar	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 Easement record in the entire portfolio.

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

Deed Business Process

Purpose

Use the Deed BP 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.

Level

Shell

Type

Simple

Workflow

The Deed BP is a non-workflow BP.

Record Statuses

- ▶ Active
- ▶ Inactive

Groups Associated with this BP

Property Managers and Facility Administrators can create and edit this BP.

Create

To create a Deed BP:

- 1) Go to the shell tab (for example, Building) where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Real Estate Data**, and then select **Deed**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) Click **Submit**.

Easement Business Process

Purpose

Use the Easement BP to capture data related to property easements, such as Easement Type, Considerations, and so forth.

Level

Shell

Type

Simple

Workflow

The Easement BP is a non-workflow BP.

Record Statuses

- ▶ Pending

- ▶ Active
- ▶ Inactive

Groups Associated with this BP

Property Managers and Facility Administrators can create and edit this BP.

Create

To create an Easement BP:

- 1) Go to the shell tab where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Real Estate Data**, and then select **Easement**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) Click **Submit**.

Parcel Business Process

Purpose

Use the Parcel BP to capture data related to property parcels, such as Parcel Number, Parcel Size, Legal Description, Parcel Map/Image, Parcel Category and type, Zoning, and so forth.

Level

Shell

Type

Simple

Workflow

The Parcel BP is a non-workflow BP.

Record Statuses

- ▶ Active
- ▶ Inactive

Groups Associated with this BP

Property Managers and Facility Administrators can create and edit this BP.

Create

To create a Parcel BP:

- 1) Go to the shell tab where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Real Estate Data**, and then select **Parcel**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.

- 5) Click **Submit**.

Property Tax Business Process

Purpose

Use the Property Tax BP to track property tax payments, including Tax Type, Amount, Parcel Number, Address, Payee Name, and so forth. Transactions are captured on line items.

Level

Shell

Type

Cost

Record Statuses

- ▶ Pending
- ▶ Approved
- ▶ Rejected
- ▶ Canceled

Groups Associated with this BP

Property Managers, Facility Managers, and Facility Administrators can create, edit, and approve this BP.

Create

To create a Property Tax BP:

- 1) Go to the shell tab where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Cost Manager**, select **Property**, and then select **Property Tax**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) From the **Workflow Actions** menu, select **Send**.

Real Estate Payment Business Process

Purpose

Use the Real Estate Payment BP to generate property-related payments not associated to a Lease or Facility Purchase Order. Line items track allocation and payment details.

Level

Shell

Type

Cost

Record Statuses

- ▶ Pending
- ▶ Approved
- ▶ Rejected
- ▶ Withdrawn
- ▶ Canceled

Groups Associated with this BP

Property Managers and Facility Managers can create, edit, and approve this 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 **Cost Manager**, select **Property**, and then select **Real Estate Payment**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) From the **Workflow Actions** menu, select **Send**.

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

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

Carbon Footprint

Use the Carbon Footprint BP to capture basic information used to calculate the total carbon footprint and associated cost for a facility. Detailed energy utilization by type and date range is captured on line items.

Emission

Use the Emission BP to capture emissions data related to a facility, such as emission type, meter name, date range and total quantity.

Utilities Management

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

Energy Meter

Use the Energy Meter BP to capture data related to an energy meter. Related meter readings are captured on line items.

Water Meter

Use the Water Meter BP to capture data related to a water meter. Related meter readings are captured on line items.

LEED Certification

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 perform 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 Benefit

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

Recycling

Use the Recycling BP to capture data related to recycling, such as the material type being recycled, date range, quantity of recycled material, and estimated value and amount. Specific quantities are tracked on line items.

Waste Generation

Use the Waste Generation BP to capture data related to waste generation, such as Waste Type, quantity, data range, and estimated value of the waste generation. Specific quantities are tracked on line items.

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	uxufcf	Shell
Recycling	uxufrcy	Shell
Waste Generation	uxufwgn	Shell
Energy Meter	uxufemt	Shell
Water Meter	uxufwm	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	uxufem	Shell
LEED Certification Levels	uxufldlv	Shell
LEED Certifications	uxufledc	Shell
LEED Realized Benefits	uxulrb	Shell

Carbon Footprint Business Process

Purpose

Use the Carbon Footprint BP to capture basic information used to calculate the total carbon footprint and associated cost for a facility. Detailed energy utilization by type and date range is captured on line items.

Level

Shell

Type

Line Item

Workflow

The Carbon Footprint BP is a non-workflow BP.

Record Statuses

- ▶ Pending
- ▶ Completed

Groups Associated with this BP

Property Managers and Facility Managers can create and edit this BP.

Create

To create a Carbon Footprint BP:

- 1) Go to the shell tab where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Utilities**, and then select **Carbon Footprint**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) Click **Submit**.

Emission Business Process**Purpose**

Use the Emission BP to capture emissions data related to a facility, such as emission type, meter name, date range, and total quantity.

Level

Shell

Type

Simple

Workflow

The Emissions BP is a non-workflow BP.

Record Statuses

- ▶ Reviewed
- ▶ In_Review
- ▶ Canceled

Groups Associated with this BP

Facility Administrators, Property Managers, and Facility Managers can create and edit this BP.

Create

To create an Emission BP:

- 1) Go to the shell tab where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Utilities**, and then select **Emission**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) Click **Submit**.

Energy Meter Business Process

Purpose

Use the Energy Meter BP to capture data related to an energy meter. Related meter readings are captured on line items.

Type

Line Item

Workflow

The Energy Meter BP is a non-workflow BP.

Record Statuses

- ▶ Reviewed
- ▶ In_Review
- ▶ Canceled

Groups Associated with this BP

Facility Administrators, Property Managers, and Facility Managers can create and edit this BP.

Create

To create an Energy Meter 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**, and then select **Energy Meter**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) Click **Submit**.

Recycling Business Process

Purpose

Use the Recycling BP to capture data related to recycling, such as the material type being recycled, date range, quantity of recycled material, and estimated value and amount. Specific quantities are tracked on line items.

Level

Shell

Type

Line Item

Workflow

The Recycling BP is a non-workflow BP.

Record Statuses

- ▶ Canceled
- ▶ In_Review
- ▶ Reviewed

Groups Associated with this BP

Facility Administrators, Property Managers, and Facility Managers can create and edit this 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**, and then select **Recycling**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) Click **Submit**.

Water Meter Business Process**Purpose**

Use the Water Meter BP to capture data related to a water meter. Related meter readings are captured on line items.

Level

Shell

Type

Line Item

Workflow

The Water Meter BP is a non-workflow BP.

Record Statuses

- ▶ Canceled
- ▶ In_Review
- ▶ Reviewed

Groups Associated with this BP

Facility Administrators, Facility Managers, Property Managers, Shop Supervisors, and Technicians can create and edit this BP.

Create

To create a Water Meter BP:

- 1) Go to the shell tab where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Utilities**, and then select **Water Meter**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) Click **Submit**.

Waste Generation Business Process

Purpose

Use the Waste Generation BP to capture data related to waste generation, such as Waste Type, quantity, data range, and estimated value of the waste generation. Specific quantities are tracked on line items.

Level

Shell

Type

Line Item

Workflow

The Waste Generation BP is a non-workflow BP.

Record Statuses

- ▶ Canceled
- ▶ In_Review
- ▶ Reviewed

Groups Associated with this BP

Facility Administrators, Property Managers, and Facility Managers can create and edit this 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**, and then select **Waste Generation**.
- 3) In the BP log, click **Create**.

- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) Click **Submit**.

LEED Certification Business Process

Purpose

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

Level

Shell

Type

Simple

Workflow

The LEED Certification BP is a non-workflow BP.

Record Statuses

- ▶ Active
- ▶ Inactive

Groups Associated with this BP

Facility Managers and Property Managers can create and edit this BP.

Create

To create a LEED Certifications BP:

- 1) Go to the shell tab where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Sustainability**, and then select **LEED Certification**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) Click **Submit**.

LEED Certification Levels Business Process

Purpose

Use the LEED Certification Levels BP to define upper and lower points for LEED levels.

Level

Shell

Type

Simple

Workflow

The LEED Certification Levels BP is a non-workflow BP.

Record Statuses

- ▶ Active
- ▶ Inactive

Create

To create a LEED Certification Levels BP:

- 1) Go to the **Organization** tab and switch to **User** mode.
- 2) In the left Navigator, select **FAM Templates**, and then select **LEED Certification Levels**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.
- 5) Click **Submit**.

LEED Realized Benefit Business Process

Purpose

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

Level

Shell

Type

Simple

Workflow

The LEED Realized Benefit BP is a non-workflow BP.

Record Statuses

- ▶ Active
- ▶ Inactive

Groups Associated with this BP

Facility Administrators and Property Managers can create and edit this BP.

Create

To create a LEED Realized Benefit BP:

- 1) Go to the shell tab where you want to create the record and switch to **User** mode.
- 2) In the left Navigator, select **Sustainability**, and then select **LEED Realized Benefit**.
- 3) In the BP log, click **Create**.
- 4) Complete the form.
The required fields are marked with a red asterisk.

5) Click **Submit**.

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.

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.

Cost management supports:

- ▶ Cost control
- ▶ Cost transactions
- ▶ Support enterprise integration
- ▶ Annual Budget
- ▶ Annual Budget Changes
- ▶ Annual Budget Transfers
- ▶ Facility Master Service Agreements
- ▶ Purchase Orders
- ▶ Purchase Order (PO) Amendments
- ▶ Purchase Order Invoices
- ▶ Work Order Invoices
- ▶ Work Order Cost

Vendor Management

The Vendor Management enables you to manage the following Business Process (BP):

- ▶ Vendor Detailed Records