



Infor EAM - Facility Management

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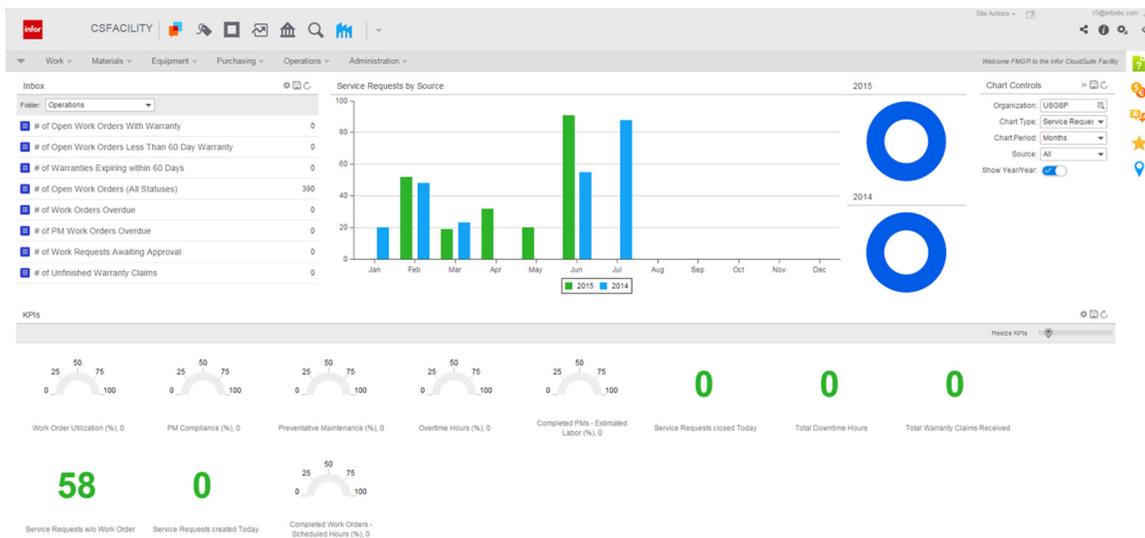
Introduction

What if...

You could better control the operating and workforce expenses of maintaining your facilities, equipment, and grounds—while also improving the services that you offer to your tenants?

You could deploy that system with a low total cost of ownership and minimal upfront investment—delivering a return that could be measured in months, not years?

You could create a shared knowledge resource of information about your facilities that your stakeholders could use to collaborate at any phase of the lifecycle?



Keep your facilities healthy with Infor Facilities Management

Maintaining your organization's facilities today and into the future is a big job. Not only must you effectively manage the health and maintenance of your facilities, grounds, and assets, but you also must address the increasingly important role that energy demand management, LEED Certification, sustainability, and environmental stewardship play in your success. Factor in the specific requirements of facility managers, service providers, building owners, and building tenants—and you have a set of complex business requirements that cry out for a technology solution to help you manage them all.

With maintenance and labor costs on the rise, it is more important than ever to have efficient, scalable technology that's up to the challenge. But finding a way to modernize your business quickly, easily, and cost-effectively hasn't been an easy thing to do. Meet Infor EAM - Facilities Management, a ready-to-run solution built specifically for buildings of all types, from public or commercial and industrial spaces to offices and multi-unit residential buildings. This solution provides deep, proven capabilities in key areas such as revenue optimization, property management, asset management and sustainability, building information modeling (BIM), business intelligence, space optimization, social business collaboration, and mobility—all delivered within an integrated framework.

Maximize profitability in an increasingly complex market

Organizations like yours are under increasing pressure to deliver results while cutting your facilities management costs.

Consider the facts:

- The facilities management industry is expected to be worth \$43.69 billion by 2019, with infrastructure development and IT advancements driving this growth.¹
- The next generation of facilities management workers will place a higher value on technology tools that allow for social collaboration, analysis of Big Data patterns, and energy sustainability.²

Delivering support and maintenance as you control costs and meet the expectations of your various stakeholders creates a complex environment with significant challenges. Infor EAM-Facility Management can provide you with the visibility to manage your facility and assets as you continue to deliver quality services to your tenants and customers.

Industry-specific software

This mature solution for facilities management offers proven functionality that is informed by 30 years of experience across multiple vertical industries.

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1. ¹ Marketsandmarkets.com, "Facility Management Market by Solutions (CAFM, IWMS, CMMS, BIM, IWMS) & Services—Worldwide Market Forecasts and Analysis (2014–2019)," May 2014.
 2. ² International Facility Management Association (IFMA), "Facility Management Trend Report: Emerging Opportunities for Industry Leaders," 2014.

Modernize, simplify, and save

So you can deliver quality service to your tenants and customers, Infor EAM- Facilities Management includes the highly flexible, robust functionality we already offer on-premise:

- Property management functions to identify, track, locate, and analyze the physical assets in your facilities, including their location, cost history, warranties, claims, meters, and documents
- Incident management tools, with comprehensive work order functions for preventative maintenance and easy-to-use scheduling tools
- Document management capabilities for records retention, compliance with service level agreements, labor regulations, financials, accounting, and human resources
- Integrated tools to connect and optimize your systems, facilities, workforce, and tenants
- Embedded, advanced analytics with specific reports for operations and forecasting performance
- Workflows, alerts, role-based dashboards, and collaboration tools to boost productivity
- Infor 10x technology—including an elegant interface that's so easy to use, very little training is required
- Full integration with 4D building information modeling to visualize operations, maintenance, and construction projects, including equipment data, data sheets, specifications, warranties, and linked documents and drawings

Take a closer look at the components

For buildings of all types, Infor EAM - Facilities Management keeps every function running with maximum efficiency, allowing you to focus on meeting all of your tenants' and customers' expectations.

Facility management delivers insights into the operations of your facilities, grounds, and equipment, giving you the tools you need to make your tenant and constituent relationships as strong and profitable as possible.

Revenue optimization automatically calculates demand forecasts for each future use of your facilities and recommends the appropriate selling strategies to maximize your yield and profit.

Asset management creates, manages, and tracks work orders and service requests to ensure you exceed expectations. Mobile access helps ensure that you'll expedite service.

Social business collaboration delivers dynamic communication across the enterprise between systems, departments, and people, including social networking with building owners, facilities managers, service provider call center staff, and tenants.

In-context analytics with built-in reporting tools allow your managers and executives to easily access and consume relevant data and measure forecast performance in a meaningful context.

Building information modeling (BIM) helps you to create preventive maintenance schedules, record product warranties, establish asset sustainability and facility baselines, forecast facility operational costs, and access initial layout designs for space management.

With Infor EAM - Facilities Management, you get innovative technology that can help you maximize revenue opportunities and reach higher profitability, whether you are a facility manager, service provider, or building owner.



Configurations

In a facility environment the typical equipment relates to the structure itself, i.e. a building, a floor in that building and a room on that floor. Other typical facility equipment might be HVAC related. Think of the chiller, the boiler or an air handler. To better support the management of this equipment several screens have been pre-configured in Infor EAM.

Feel free to add additional screens to this configuration or add and remove attributes from these screens as required. This is a configuration, nothing is written in stone.

As part of this configuration the following assumptions have been made:

1. Organization – ISO 3166 2 digit Country code, followed by the IATA airport code. For example USGSP.
2. Department – Not considered relevant for the configuration and is therefore hidden from most screens. But nothing will go wrong if you reintroduce Department, in case you need it. Remember, this is a configuration that may be extended or modified, as nothing is written in stone.

Equipment Screen Configurations

The following equipment screens have been configured. All these are clones based on the standard equipment screens.

- Campuses – Use the Campus screen to define a campus that represent a group of related buildings.
- Buildings – Within a Campus you can define buildings. When you define the building make sure you also identify the parent Campus on the Structure tab.
- Floors – Within a building define the floors.
- Rooms – Within a floor define the rooms.
- Boilers
- Chillers
- Cooling Towers
- Pumps
- Air Handling Equipment
- Packaged Units
- Exterior Lighting
- Computers
- Vehicles
- Fire extinguishers

Note that the standard Assets, Positions and Systems screens will filter out, using Security Filters, all equipment for which specific screen configurations have been created. For example boilers will not appear on these screens, but only on the Boilers screen.

Facility coding structure:

- Organization: USGSP
- Campus: USGSP-C01
- Building: USGSP-C01-B01
- Floor: USGSP-C01-B01-F01
- Room: USGSP-C01-B01-F01-R101

Coding structure for fixed equipment (equipment that does not move) will follow the same pattern as that used for Buildings, Floors and Rooms. For example:

- Chiller: USGSP-C01-B01-F01-CHILLER01
- Boiler: USGSP-C01-B01-F01-BOILER01

Coding structure for assets that do move should not follow this pattern however. Coding structure for these assets should be unique across organizations. These assets should also be created in the * Organization.

Non-Equipment Screen Configurations

The following additional screens have been configured.

- Asset Inspection Checklist – Create an inspection, and record the results of that inspection, for an asset. When the inspection is complete click on Move to Complete.
- Review Asset Checklist – Depending on the Task Plan and the Equipment selected on the Asset Inspection Checklist, when you click “Move to Complete” the inspection is either completed, or requires a review still. If a review is required, you can do that on this screen. Note: The switch between complete and review required, can be defined on the Field Filter Setup screen.
- Utilities – Define utilities for which you want to record and track utility bills. Make sure the UOM is entered for all utility records.
- Utility Bill – Enter the utility bill. Use the header to record the utility supplier and then on the Utility Bill Details tab enter the Utility Bill Source, i.e. the Building or asset the bill is for, the Utility, the period the bill covers and the usage and invoice amount. When completed set the header status such that the bill is ready for the utility bill audit.
- Asset Repair Work Request – Use this screen to enter a work request for an equipment. This could be a request for a breakdown repair, but it could also be a request for modification or improvement.

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- Self Service Asset Request – Reservation request for an asset. Request a vehicle that is needed for a road trip for one week next month, or request a projector that you need for a presentation next week.
 - Approve Asset Reservation Request – Reservation requests for an asset can be approved or rejected on this screen.
 - Asset Reservation – Handle the issue and return transactions for reserved assets. Ad-hoc issues are also supported in case of an emergency where the reservation process (request and request approval) was not followed.
 - Work Orders – Use this screen to create and manage work orders.
 - Call Center – The call center screen collects service requests coming from the Customer Service Request portal, but helpdesk personnel can also directly enter requests on this screen based on a customer interaction on the phone or via email.

Important: The call center is setup to use the Service Delivery Matrix. That means a Service Problem Code and Provider can only be entered after an Equipment is entered. Make sure this equipment has a Service Delivery Matrix attached. Either directly to itself or indirectly via a parent / child relationship. Without a Service Delivery Matrix the lookups will still remain blank.

Security Configurations

For the different responsibilities typically found in a facility management environment, menus that give access to Infor EAM screens, are pre-configured. The following responsibilities (user groups in Infor EAM) are pre-configured.

- Asset Reservation Manager (ARMG)
- Call Center Manager (CMGR)
- Call Center Personnel (CPER)
- Contractor (CNTR)
- Facility Executive (FEXC)
- Facility Inspector (FINP)
- Facility Manager (FMGR)
- MRO Buyer (MBUY)
- Space Planner (SPLN)
- Store Room Personnel (SR0M)
- Technician (TECH)
- Utility Specialist (USPL)

Configuration Data

Configuration Data is supplied in the form of excel documents. Great care is taken in compiling the data in these spreadsheets. The data supports a variety of work flow processes and configurations. As such we strongly recommend uploading the data without any alterations. However, if changes need to be made, do so before you upload and be aware of the impact of these changes on the workflow aspects and the pre-configured flexible business rules.

The following data is provided:

- Properties – One property is loaded to support a flexible business rule (see later in this document) that synchronizes service problem codes with service codes. Without this property the flexible business rule will fail.
- Customers – One customer is loaded to support a flexible business rule that synchronizes contact information with callers for the Customer Service Request portal. Without this customer the flexible business rule will fail.
- Customer Properties – Links the customer and the property from the previous steps.
- System Codes – Loads work order status codes, work order priorities and work order types. Additionally it loads fuel types (support for greenhouse gas calculations), vehicle types, call center status and a call center contact source codes.
- Trades – Loads trades.
- Assets – The equipment loaded is actually a system is loaded to support a flexible business rule that synchronizes service problem codes with service codes. Without this system the flexible business rule will fail.
- Status Authorizations – Several status authorizations (from status – to status) are loaded to support the workflow configurations.
- Queries – Queries are loaded to support inbox items, KPIs and charts for the Start Center.
- Inbox Items – Loads the pre-configured inbox items for the Start Center.
- Key Performance Indicators – Loads the pre-configured KPIs for the Start Center.
- Charts – Loads the pre-configured charts for the Start Center.
- Fuels – Fuels to calculate greenhouse gas emissions based on entered utility bills.

- Commodities – Commodities for utility bills. These will appear on the Utilities screen.
- Commodity Fuels – Fuels for the relevant commodities and their respective CO2 emissions to calculate greenhouse gas emissions. Fuels tab of the Utilities screen.
- Greenhouse Gases – List of greenhouse gases and their CO2 equivalence (CO2e) ratio.

Flexible Business Rules

Several Flexible Business Rules are provided for a variety of reasons, but mostly to support workflow processes and ease of use. As mentioned earlier, great care is also taken in compiling these flexible business rules. As such we strongly recommend using them without alterations. However, if changes need to be made to a business rule, because configuration data was altered or because the work flow does not fit, do so with great care.

The following flexible business rules are provided.

- When a new user is created copy inbox, KPI and chart data to the user's Start Center based on the selected User Group of that user.
 - Table R5USERS
 - Insert trigger
 - Sequence 10
- Create Provider when a Supplier is created. In future versions of Infor EAM the provider will cease to exist and the supplier will take on the provider role. This business rule will automatically create the provider if a supplier is inserted.
 - Table R5COMPANIES
 - Insert trigger
 - Sequence 10
- Keep Provider and Supplier in sync with each other. This will automatically update the provider if a supplier is updated.
 - Table R5COMPANIES
 - Update trigger
 - Sequence 10
- Copy Contact Information to Callers. Since we are using the Customer Service Request portal (caller login) we need to synchronize the entered Contact Information so that the contact can login to the Customer Service Request portal.

Note: To keep these entities synchronized in the future the system will also set a custom field value on Contact Information and store the reference to the Caller. All Callers are associated to one and the same pre-configured customer (CC001).

 - Table R5CONTACTINFO
 - Insert trigger
 - Sequence 10
- Keep Caller and Contact Information in sync with each other. This will automatically update the caller if a contact is updated.
 - Table R5CONTACTINFO
 - Update trigger

- Sequence 10
- Create Service Code when a Service Problem Code is created. A service code is required since we are using the Customer Service Request portal. For the required fields on the service codes screen, Property is populated with CMP001 and System with SC001.
 - Table R5SERVICEPROBLEMCODES
 - Insert trigger
 - Sequence 10
- Keep Service Code and Service Problem Code in sync with each other. This will automatically update the service code if a service problem code is updated.
 - Table R5SERVICEPROBLEMCODES
 - Update trigger
 - Sequence 10
- Create Call Center record when service request is created from the Customer Service Request portal.
 - Table R5SERVICEREQUESTS
 - Insert trigger
 - Sequence 10
- Call Center record with an estimated cost over 3000 will require the Equipment to be entered.
 - Table R5CONTACTRECORDS
 - Insert and Update trigger
 - Sequence 10
- Copy Auto Create WO and Estimated Costs from the selected Service Code to the Call Center record. The Auto Create WO flag if selected will trigger the work order creation automatically. This trigger will only work during insert however.
 - Table R5CONTACTRECORDS
 - Insert and Update trigger
 - Sequence 20
- Create capital planning request if Estimated Costs on the Call Center record \geq 3000.
 - Table R5CONTACTRECORDS
 - Insert and Update trigger
 - Sequence 30
- Close or cancel the originating service request when the call center record is closed or cancelled.
 - Table R5CONTACTRECORDS
 - Update trigger
 - Sequence 40