ES10001 – Implement IWMS (Space and Maintenance Mgt)
Project Charter

1. Executive Summary

Select and implement an Integrated Workplace Management Solution (IWMS), modules of space and maintenance management, for the University of Houston. Four phases identified. Product evaluation/selection process was the scope of the Planning Phase; selected product was FAMIS. Phase 1 scope is the implementation of the space management module(s). Phase 2 scope is the implementation of the maintenance management module(s). Phase 3 scope is the implementation of maintenance modules (including self-service) for Residential Life and Housing (RLH). Estimate completion for Phases 1-3 is 2011. Budget for Phases 1-2 will be provided by Plant Operations. Phase 3 will be further analyzed and scoped during Phase 2.

2. Project Scope

A. Scope of Work

Planning Phase: Leverage PeopleSoft in preparation for the 2010 Audit and complete technical evaluation of IWMS solutions

a. Focus on data quality for 2010 audit. Plant Operations is updating existing data in preparation for 2010 audit. No changes in the PeopleSoft application were identified by the business owner in preparation for the 2010 audit.
b. FM Systems™ was selected from the functional perspective by the business owner as the IWMS solution to be implemented. Due diligence on FM Systems™ from a technical perspective with emphasis on integration with PeopleSoft, technical architecture, licensing, maintenance, and implementation costs, will be completed by UIT by ***January 2010.***
c. Recognize and optimize the relationship between our current Enterprise Resource Planning environment (ERP aka PeopleSoft) and the IWMS. Our ERP will maintain its role as the authoritative data source for State (CB) and Federal Reporting.

Phase 1 Status: Completed. March 2010. Selected product: FAMIS.

Phase 1: Implement selected IWMS Solution - Space Mgt modules

- Implement FAMIS. The scope of this phase will be the space management module(s) implementation only, including AutoCAD interface and Visual Map Xi3.

Phase 2: Implement selected IWMS Solution - Maintenance Mgt modules

- Implement FAMIS. The scope of this phase will be the maintenance management module(s) implementation including work order module, key control, and inventory control.

Phase 3: Implement/Migrate RLH Work Order System

- Analysis of current RLH Work Order system (TMA) and migration to FAMIS. Further detailed scope will be defined during Phase 2.

B. Other Information (optional)

Identify known scope boundaries, assumptions, constraints, risks, and/or related projects

Scope Boundaries

Implementation of the space management and maintenance management modules for UH Plant Operations. The details about the modules that will be implemented are provided in the SOW document.

Assumptions

- UIT will provide project management expertise
- UIT will provide server, database and application administration
- UIT will provide backup services and Oracle database licenses at no cost
- UIT will have 1 FTE funded by Plant Operations for application management purposes

Risks

A separate risk list will be created as part of this project and published in the project web site

Project Documentation

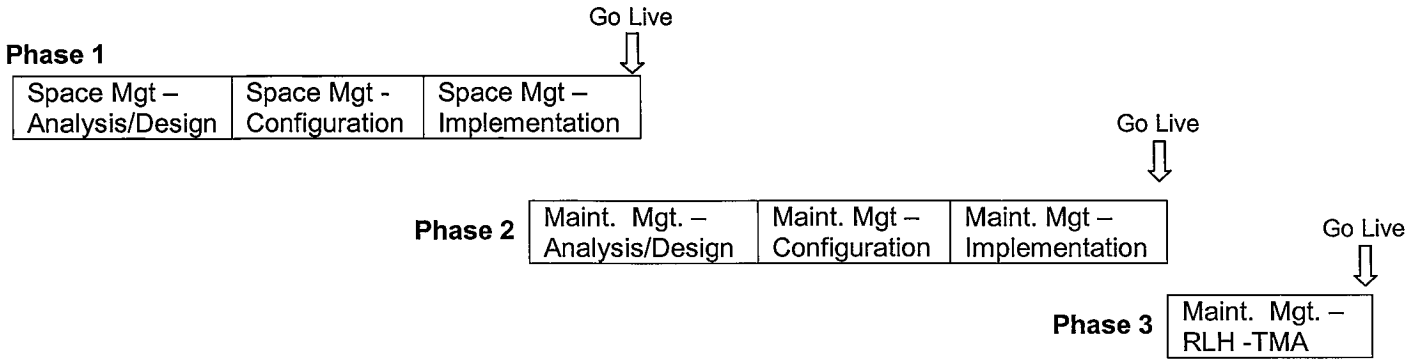
A project web site will be available in SharePoint with all project documentation

C. Major Milestones

Provide a list of the project's major milestones

	Milestone	Completion/ Target Date	Deliverables/Comments
1	Project Kickoff	01/05/2010	Project charter signed 1/6/10
	PLANNING PHASE		
2	Technical Evaluation on FM Systems Completed	01/29/2010	FM:Systems evaluation report with recommendations submitted.
3	Final Technical Evaluation Completed (FM:Systems and FAMIS)	3/29/2010	Final technical evaluation report submitted in March. Recommended product: FAMIS
	PHASE 1		
4	Vendor engaged. Contract signed	July 2010	Scope meeting 4/30/10.
5	Space – Analysis/Design		
6	Space – Configuration		
7	Space – Implementation		
8	*Space - Go Live*	TBD	Date will be further revised/agreed with vendor during planning stage
	PHASE 2		
9	Maintenance – Analysis/Design	TBD	
10	Maintenance – Configuration	TBD	
11	Maintenance - Implementation	TBD	
12	*Maintenance – Go Live*	TBD	
	PHASE 3		
	RLH TMA migration (Work Order)	TBD	To be further analyzed during Phase 2.
13	Lessons Learned Review	TBD	
14	Project Completion	TBD	

Phases 1 and 2 will be executed as follows:



We will follow Accruent's recommended Accelerate™ project management methodology (five-stage approach: plan, design, configure, go-live, optimize) for implementing the IWMS solution within a phased approach.

3. Project Organization

Stakeholders:	Dennis Fouty, AVP/AVP Information Technology and CIO
	Elwyn Lee, VC/VP Student Affairs
	Diane Murphy, Assoc VP, Student Affairs
	Ed Hugetz, Assoc VC/VP, Planning/Univ. Out., Academic Affairs
Business Owners:	Spencer Moore, Facilities Planning and Construction
	Melissa Rockwell, Facilities Management
	Javier Hidalgo, Residential Life and Housing
Project Owner:	Lillian Wanjagi, Facilities Planning and Construction
Project Sponsor:	Arun Jain, UIT Enterprise Systems
Overall Project Manager:	Rita Barrantes, UIT Office of the CIO
UIT Program Manager:	Haseen Mazhar, UIT Enterprise Systems
Vendor Project Manager:	TBD (Accruent)
Technical Team:	
	Eric Block, UIT Enterprise Architecture
	Keith Martin, UIT PeopleSoft Finance
	Mike Lovelady, UIT PeopleSoft Human Resources

Jitender Kumar, UIT Database Administrator
Leo Moreno, UIT PeopleSoft Application Developer (Facilities)
Keith Pham/David Frankfort, UIT Server Administrator
TBD, Application Administrator, UIT Enterprise Systems
Sheree Pearce, Plant Operations IT
Khanh Huynh, Plant Operations IT

Functional Team:

Marie Coleman, PeopleSoft Functional Analyst (Facilities)
TBD, IWMS Functional Analyst, Plant Operations IT

4. Summary Budget

Project Costs (Estimates)

Category	Description	Amount
One-Time		
Professional Services		
	Phase 1 (Installation, Consulting, and Training) *Note: $2,800 contingency fees and $13,500 travel expenses included*	$73,700
	Phase 2 (Consulting and Training) *Note: $40,950 contingency fees and $16,200 travel expenses included*	$151,125
	Phase 3 (Consulting only)	$18,900
	Sub-total:	**$243,725**
Software		
	FAMIS Space Mgt (includes AutoCAD interface)	$87,876
	FAMIS Maintenance Mgt (includes Key Control)	$124,884
	FAMIS Inventory Control	$25,816
	20% Discount FAMIS licenses:	(47,715)
	Oracle Applications Licenses[2]	$67,729
	Sub-total:	**$258,590**
Hardware		
	HP Quote: virtual technology	$69,239
	1 terabyte data space (production tier)	$8,000
	Sub-total:	**$77,239**
Recurring		
	FAMIS Annual Maintenance	$38,172
	Oracle Applications Annual Maintenance[1]	$14,900
	Sub-Total	**$53,072**
	Estimated TOTAL:	**$632,626**

Funding: Facilities Management is funding this project utilizing cash reserves that have been set aside for this project/service improvement effort.

[1] Oracle applications licenses provided by Accruent

Important: Scope details, associated costs, and terms of the agreement are specified in the Statement of Work and the Master Agreement.

Approvals

Identify the project charter's approvers.

Business Owner: Spencer Moore (Phase 1)	Date: 6/9/10
Business Owner: Melissa Rockwell (Phase 2)	Date: 6-9-10
Business Owner: Javier Hidalgo (Phase 3)	Date: 6/9/2010
Project Owner: Lillian Wanjagi	Date: 6-9-10
UIT Project Sponsor: Arun Jain	Date: 6/16/10
UIT Program Manager: Haseen Mazhar	Date: 6/16/10.
UIT Project Manager: Rita Barrantes	Date: 6/11/10

FM INTERACT EVALUATION – FUNCTIONAL

A more comprehensive software technology is needed to adequately provide the information needed for quality facilities management. FM Interact provides a substantially broader technology solution to meet many of those information needs than the current system being used for Facilities tracking. The current system, PeopleSoft Student Administration, does not have a separate facilities tracking module or robust facilities tracking delivered functionality but does have a few pages that capture high-level facilities data to meet state reporting requirements. The current system's focus of providing data needed to meet state reporting requirements needs to be paired with a technology that will also provide the data needed for internal management decision making regarding facilities construction, usage and maintenance. Below are some key points of consideration from a functional perspective regarding the brief evaluation of FM Interact as a facilities management technology solution that would be integrated with the current system of record, PeopleSoft SA:

- The functionality chosen to be demoed by the vendor would meet many of the broader needs of the Facilities department to better manage their facilities data.
- Client feedback received concerning the responsiveness of the vendor was good.
- Client feedback concerning system performance for their end users was very good.
- A key business need that was not sufficiently demoed by the vendor and which client feedback was not positive was FM Interact's capability of maintaining changes to data and storing changes as historical records. This is one of the biggest weaknesses identified so far with FM Interact as a technology solution, and it strongly recommended that this gap in business need be resolved with the vendor as soon as possible.
- A benchmarking feature of FM Interact's technology is the concept of what is treated as configuration instead of being treated as customization by the technology. The technology treats many traditional modifications as configuration instead of customization which eliminates traditional issues customizations pose with regard to patches, upgrades, etc. and the technical/functional resources required to maintain the changes. For instance changing the length of a field or making a field read only is considered as a configuration by the vendor and not customization, and according to the vendor those changes would not impact upgrade efforts and no technical oversight would be needed to compare versions. This feature has not been adequately demoed, it is recommended a more thorough evaluation of this feature be performed to better identify if/what customizations would be needed to the delivered technology.
- Client feedback concerning adequate Needs Analysis performed by the vendor was not good. It is strongly recommended that UH performs a rigorous and detailed Needs Analysis (focusing on UH's data requirements instead of the structure of the delivered technology) with the vendor.
- Responses from client feedback appeared to indicate weak testing prior to implementation was performed by both the clients and the vendor which resulted in issues of data integrity and unidentified needed customization. It is strongly recommended UH performs rigorous and detailed testing.
- Although the vendor purports a quick implementation model, it is strongly recommended UH uses a more expanded time frame for implementation. As previously mentioned, client feedback indicated issues with poor Needs Analysis and inadequate testing which may have been related to an aggressive implementation model lacking adequate detail.
- Feedback from one of the clients indicated there were problems addressing user security and getting the vendor in tandem with their security policies. It is recommended the

vendor provides clarification of the software's capability of meeting our security policies for end users use of the software.

- It is strongly recommended that parent hierarchal related data continue to be created as a source record in the system of record, PeopleSoft SA. Data stored in child hierarchal related tables could be entered in the companion system FM Interact once parent records are fed from PeopleSoft SA to FM Interact.
    - It is strongly recommended that for any fields that exist in both the system of record PeopleSoft SA as well exist in FM Interact that data entry into those fields only happen in one system to the exclusion of the other. If a decision is made that for a particular field that FM Interact is the source of entry and the field also exists in PeopleSoft SA, then that field in PeopleSoft SA should be grayed out to prevent data entry in PeopleSoft SA; and if a decision is made that for a particular field that PeopleSoft SA is the source of entry and that field also exists in FM Interact, then that field in FM Interact should be grayed out to prevent data entry in FM Interact.
    - It is equally important to leverage the efficiencies that FM Interact delivers with reducing the need for human data entry, as with its AutoCAD load functionality. It is recommended a more thorough evaluation needs to be made in identifying which records are okay to initially create in FM Interact versus which records should be created in PeopleSoft SA to avoid issues with data integrity, orphaned records, incomplete feeds, broken integration points to other modules and systems depending on data captured in PeopleSoft SA facilities data, etc.
- It is strongly recommended that facilities CB reporting continue to be done out of PeopleSoft SA and not extracted from within FM Interact.
    - A key consideration is a portion of the logic used in extracting the facilities data reported to the state uses data in another non-facilities CB report (courses actually taught in facilities that reporting period) to ensure data integrity.
    - Another key consideration is none of the client feedback received so far provides evidence of adequate state reporting from within FM Interact.

University of Houston

ID	Task Name	Duration	Start	Finish	Predecessors	Resource Names
1	**Phase I FAMIS Space Implementation)**	**118 days**	**Fri 10/1/10**	**Fri 3/25/11**		
2	**1.0 PLANNING**	**11 days**	**Fri 10/15/10**	**Fri 10/29/10**		
3	Project Planning & Scheduling	11 days	Fri 10/15/10	Fri 10/29/10		
4	Kick-off Project with Client	1 day	Mon 10/25/10	Mon 10/25/10		
5	**2.0 DESIGN**	**48 days**	**Fri 10/1/10**	**Thu 12/9/10**		
6	Conduct Project Team Immersion Training	2 days	Tue 10/26/10	Wed 10/27/10	4	ACC
7	Additional day of immersion training (CR#1)	1 day	Tue 11/9/10	Tue 11/9/10		
8	Conduct Business Process Modeling Workshop	2 days	Wed 11/10/10	Thu 11/11/10	6	ACC
9	Document Space Configurations	4 days	Fri 11/12/10	Wed 11/17/10	8	ACC
10	**2.4 Establish Client Infrastructure**	**33 days**	**Fri 10/1/10**	**Tue 11/16/10**		
11	Acquire Hardware	11 days	Fri 10/1/10	Fri 10/15/10		UH
12	Setup infrastructure for TEST and PROD enviros	9 days	Wed 10/20/10	Mon 11/1/10		UH
13	Install Software and Establish Client Environments	10 days	Tue 11/2/10	Mon 11/15/10	12	EC
14	Validate Installation	1 day	Tue 11/16/10	Tue 11/16/10	13	EC,ACC
15	**2.5 Analyze Existing Data**	**15 days**	**Wed 11/17/10**	**Thu 12/9/10**		
16	Conduct analysis of data to be migrated to FAMIS	5 days	Wed 11/17/10	Tue 11/23/10	10	ACC,UH
17	Conduct analysis for intergation of legacy with FAMIS	5 days	Wed 11/24/10	Thu 12/2/10	16	UH
18	Finalize analysis for migration and data integrations	5 days	Fri 12/3/10	Thu 12/9/10	17	
19	**3.0 CONFIGURE**	**59 days**	**Fri 12/10/10**	**Thu 3/10/11**		
20	Data Collection per templates provided	15 days	Fri 12/10/10	Fri 1/7/11	18	UH
21	LDAP configurations	3 days	Fri 12/10/10	Tue 12/14/10	18	ACC,EC
22	**3.1 Configure FAMIS system**	**11 days**	**Mon 1/10/11**	**Mon 1/24/11**	**18**	
23	FAMIS Space Management	2 days	Mon 1/10/11	Tue 1/11/11	20	ACC
24	FAMIS AutoCAD Interface	2 days	Wed 1/12/11	Thu 1/13/11	23	ACC
25	Configure AutoCAD desktop with Oracle & SDF Generator	4 days	Fri 1/14/11	Wed 1/19/11	24	ACC
26	Visual Map	1 day	Thu 1/20/11	Thu 1/20/11	25	ACC
27	Visual Space Planning	1 day	Thu 1/20/11	Thu 1/20/11	25	ACC
28	Space Survey	2 days	Fri 1/21/11	Mon 1/24/11	27	ACC
29	**3.2 User Configurations**	5 days	Mon 12/20/10	Mon 1/3/11	21FS+3 days	ACC
30	**3.3 Develop Conversions and Integrations**	30 days	Fri 12/10/10	Fri 1/28/11	18	ACC
31	**3.4 Data Load I**	**13 days**	**Tue 1/25/11**	**Thu 2/10/11**	**28**	
32	Data loads per templates provided	10 days	Tue 1/25/11	Mon 2/7/11		ACC
33	Review Data loads	2 days	Tue 2/8/11	Wed 2/9/11	32	UH

Project: ACC_UH_FAMISImplementat
Date: Fri 3/17/17

Task	External Milestone	Manual Summary Rollup	
Split	Inactive Task	Manual Summary	
Milestone	Inactive Milestone	Start-only	
Summary	Inactive Summary	Finish-only	
Project Summary	Manual Task	Progress	
External Tasks	Duration-only	Deadline	

ID	Task Name	Duration	Start	Finish	Predecessors	Resource Names
34	Approve data loads	1 day	Thu 2/10/11	Thu 2/10/11	33	
35	**3.5 CAD Drawing Preparation**	30 days	Thu 1/20/11	Wed 3/2/11	25	ACC
36	**3.6 Conduct CRP / UAT**	**12 days**	**Fri 2/11/11**	**Mon 2/28/11**		
37	Prepare for CRP / UAT / Data Validation	1 day	Fri 2/11/11	Fri 2/11/11	34	ACC,UH
38	Conduct CRP + User Acceptance Testing	2 days	Mon 2/21/11	Tue 2/22/11	37FS+5 days	ACC,UH
39	Close CRP Issues	4 days	Wed 2/23/11	Mon 2/28/11	38	ACC
40	**3.7 Data Load II**	**2 days**	**Thu 3/3/11**	**Fri 3/4/11**		
41	Data Load II	1 day	Thu 3/3/11	Thu 3/3/11	39FS+2 days	ACC
42	Snapshot TEST data for PROD	1 day	Fri 3/4/11	Fri 3/4/11	41	EC
43	**3.8 Conduct Training**	**6 days**	**Thu 3/3/11**	**Thu 3/10/11**		
44	Conduct Train-the-Trainer	4 days	Thu 3/3/11	Tue 3/8/11	39FS+2 days	ACC
45	Conduct Administrator Training	2 days	Wed 3/9/11	Thu 3/10/11	44	ACC
46	**4.0 GO LIVE**	**19 days**	**Tue 3/1/11**	**Fri 3/25/11**		
47	**4.1 Develop Go Live Plan**	**1 day**	**Tue 3/1/11**	**Tue 3/1/11**	**39**	
48	Identify Production Cutover and Contingency Plan	1 day	Tue 3/1/11	Tue 3/1/11		UH
49	4.2 Conduct Readiness Assessment	1 day	Fri 3/11/11	Fri 3/11/11	45	
50	4.3 Prepare Production Environment	1 day	Mon 3/14/11	Mon 3/14/11	49	
51	4.4 Verify Product Environment Readiness	1 day	Tue 3/15/11	Tue 3/15/11	50	
52	4.5 Communicate Production environment is Live	1 day	Wed 3/16/11	Wed 3/16/11	51	
53	4.6 Begin Live Processing	1 day	Thu 3/17/11	Thu 3/17/11	52	UH
54	4.7 Sign-off On Go Live	1 day	Tue 3/22/11	Tue 3/22/11	53FS+2 days	UH
55	**4.8 Support Cut-Over**	**2 days**	**Wed 3/23/11**	**Thu 3/24/11**		
56	Internal Transition to Support Services	1 day	Wed 3/23/11	Wed 3/23/11	54	UH
57	Transition Client to Accruent Support Services	1 day	Thu 3/24/11	Thu 3/24/11	56	ACC
58	Evaluate and Close Phase I	1 day	Fri 3/25/11	Fri 3/25/11	57	
59						
60	**Phase II - Maintenance Management Implementaion**	**240 days**	**Tue 1/11/11**	**Mon 12/12/11**		
61	**1.0 PLANNING**	30 days	Tue 1/11/11	Mon 2/21/11		
62	**2.0 DESIGN**	120 days	Tue 2/22/11	Mon 8/8/11	61	
63	**3.0 Configure**	60 days	Tue 8/9/11	Mon 10/31/11	62	
64	**4.0 GO LIVE**	30 days	Tue 11/1/11	Mon 12/12/11	63	
65	**Phase II - Maintenance Management Data Conversion (TMA System)**	**1 day**	**Fri 9/24/10**	**Fri 9/24/10**		
66	**1.0 PLANNING**	1 day	Fri 9/24/10	Fri 9/24/10		

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Task	External Milestone	Manual Summary Rollup	
Split	Inactive Task	Manual Summary	
Milestone	Inactive Milestone	Start-only	
Summary	Inactive Summary	Finish-only	
Project Summary	Manual Task	Progress	
External Tasks	Duration-only	Deadline	

ID	Task Name	Duration	Start	Finish	Predecessors	Resource Names
67	**2.0 DESIGN**	1 day	Fri 9/24/10	Fri 9/24/10		
68	**3.0 Configure**	1 day	Fri 9/24/10	Fri 9/24/10		
69	**4.0 GO LIVE**	1 day	Fri 9/24/10	Fri 9/24/10		

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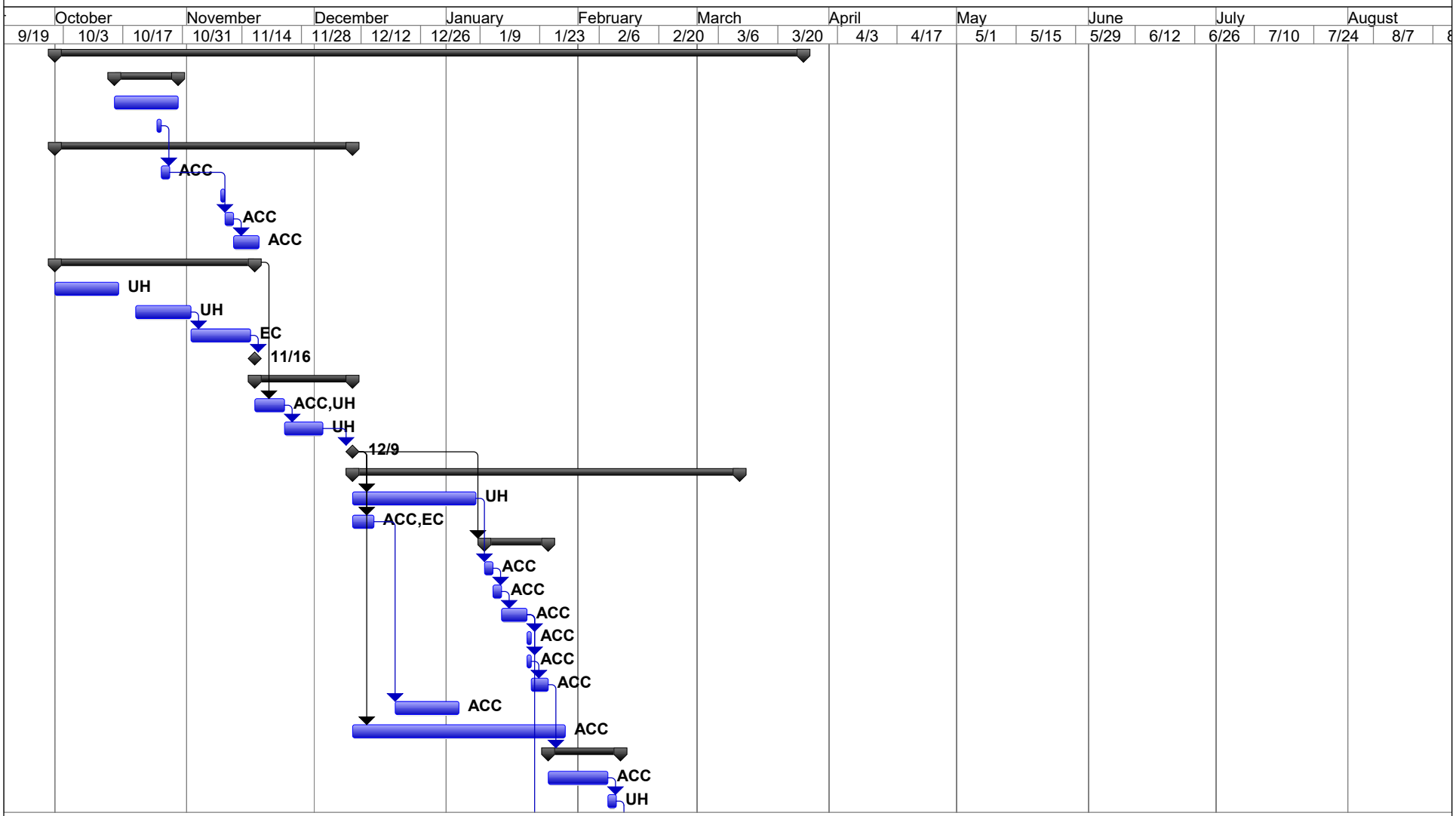

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Task		External Milestone		Manual Summary Rollup	
Split		Inactive Task		Manual Summary	
Milestone		Inactive Milestone		Start-only	
Summary		Inactive Summary		Finish-only	
Project Summary		Manual Task		Progress	
External Tasks		Duration-only		Deadline	

Overall Functionality

The FAMIS to PeopleSoft Interface shall be executed on a nightly basis in order to keep the space data synchronized between the two systems. An initial data load of the space information including sites, buildings/facilities, floors, rooms and allocation data was initially loaded into Famis. Famis will be the system of record from that point forward. All subsequent updates to the space data shall be performed in FAMIS and then updated in PeopleSoft via the Famis-to-PeopleSoft Interface.

been developed to read the building and room data files and update the appropriate peoplesoft tables that are used to produce the CB reports. The process to generate these two files will be run at 6:00 pm every nite and the two sqr programs that read these files will be set up to run at 10:00 pm by plant ops. Reports are generated by these sqr programs to detail updates made and errors encountered during the run. All PS records will be updated with the current system date for those rooms that have changes.

Building Fields from Extract File	Famis Table.field	PS Table.field	Validation For PS
Bldg_code	fam_facility_alias.alias_code	ps_uhs_bldg_tbl.bldg_cd	must be numeric and 10 digits or less
Status	fam_facility.status (1st char only)	ps_uhs_bldg_tbl.eff_status	A' or 'I'
setid	fam_site.site_code	ps_uhs_bldg_tbl.setid	
condition_code	fam_facility.custom01 (1st char only)	ps_uhs_bldg_tbl.uhs_condition_code	ps_uhs_ppacbbcd
ownership_code	fam_ownership.ownership_code	ps_uhs_bldg_tbl.uhs_ownership_code	ps_uhs_ppacbbo
uhs_location	fam_facility.custom02	ps_uhs_bldg_tbl.location	ps_location_tbl
cb_location_cd	fam_facility.custom03	ps_uhs_bldg_tbl.uhs_cb_location_cd	ps_uhs_ppacbbl
building_type	fam_facility.facility_type	ps_uhs_bldg_tbl.building_type	ps_uhs_ppacbbt
constructn_type	fam_facility.custom07	ps_uhs_bldg_tbl.cnstructn_type	
init_occupy_yr	fam_facility.custom06	ps_uhs_bldg_tbl.uhs_init_occupy_yr	
num_of_floors	fam_facility.custom04	ps_uhs_bldg_tbl.uhs_num_of_floors	
num_of_rooms	fam_facility.custom05	ps_uhs_bldg_tbl.uhs_num_of_rooms	
gross_sqr_feet	fam_facility.gross_area	ps_uhs_bldg_tbl.uhs_tot_gros_sq_ft	
tot_usable_area	fam_facility.usable_area	ps_uhs_bldg_tbl.uhs_tot_usabl_area	
tot_assgn_area	fam_facility.area_1	ps_uhs_bldg_tbl.uhs_tot_assgn_area	
Edu_gen_area	fam_facility.area_2	ps_uhs_bldg_tbl.uhs_edu_gen_area	
effective_date		ps_uh_bldg_tbl.effdt	current system_date
latitude	fam_facility.custom18	ps_bldg_tbl.scc_latitude	
longitude	fam_facility.custom19	ps_bldg_tbl.scc_longitude	

Building Fields from Extract File	Famis Table.field		PS Table.field	Validation For PS
Setid	fam_site.site_code			must be numeric and 10 digits or less
Facility_id	Concatenate building and room for PS			A' or 'I'
Building	famis_room.building			remove leading 0
Room	famis_room.room		ps_uhcb_facility.uhcb_room	ps_uhs_ppacbbcd
uhcb_facility_type	famis_room.extra_col1		ps_uhcb_facility.uhcb_facility_type ps_facility_tbl.facility_type(short_descr)	ps_uhs_faciltyp_vw - get short descr
uhs_facility_type	famis_room.extra_col2		ps_uhcb_facility.uhs_facility_type	ps_uhs_facility_ty
floor_number	famis_room.floor		ps_uhcb_facility.floor_number	ps_uhs_ppacbbl
length	usable_area / 10 for PS requirement		ps_uhcb_facility.length	ps_uhs_ppacbbt
width	default at 10 for PS requirement		ps_uhcb_facility.width	
usable_area	famis_room_alloc.sqr_feet		ps_uhcb_facility.usable_area	
assgnbl_area	famis_room.atttribute3		ps_uhcb_facility.assgnbl_area	
gen_educ_area	famis_room.attribute4		ps_uhcb_facility.gen_educ_area	
eff_status	famis_room.status		ps_facility_tbl.eff_status	A' or 'I'
bldg_cd	fam_facility_allias.alias.code		ps_facility_tbl.bldg_cd	
descrshort	famis_room.alt_room_name		ps_facility_tbl.descrshort	
descr	famis_room.description		ps_facility_tbl.descr	
facility_group	famis_room.attribute9		ps_facility_tbl.facility_group	
location	fam_facility.custom02		ps_facility_tbl.location	
capacity	famis_room.capacity		ps_facility_tbl.room_capacity	
facility_conflict	famis_room.attribute10		ps_facility_tbl.facility_conflict	
ext_sa_facility_id	famis_room.attribute11		ps_facility_tbl.ext_sa_facility_id	current system_date
functional_use_source	famis_room_alloc.functional_use_source = 'R'oom Alloc	famis_room_alloc.functional_use_source = 'G' roup alloc		
function	famis_room_alloc_function.function_code	famis_room_alloc_group.attribute_2	ps_uhcb_dept_faclt.uhcb_dept_use	ps_uhs_ppacbru
cip_code	famis_room_alloc_function.attribute_1	famis_room_alloc_group.attribute_1	ps_uhcb_dept_faclt.cip_code	ps_uhs_cipfclty_vw
Dpt_id	famis_room_alloc_function.attribute_2	famis_room_alloc_group.group_id	ps_uhcb_dept_faclt.deptid	ps_dept_tbl
Percent	famis_room_alloc_function.percent	famis_room_alloc_group.percent	ps_uhcb_dept_faclt.percentage	

path_label_pgtab	PORTAL_URI_SEG2	FIELD NUM	LBLTEXT	LABEL_ID	FIELDNAME	RECNAME	FIELD USE
> Root > Set Up SACR > Foundation Tables > Facilities > Building Table > Building Table	BLDG_TBL	1	Building Table	BUILDING TABLE	DEF_ST_AD_SU_LBL	DERIVED_AS_LBL	1027
		2	Building	BLDG_CD	BLDG_CD	BLDG_TBL	1
		4	Effective Date	EFFDT	EFFDT	BLDG_TBL	0
		5	Status	EFF_STATUS	EFF_STATUS	BLDG_TBL	0
		6	Description	DESCR	DESCR	BLDG_TBL	0
		7	Short Description	DESCRSHORT	DESCRSHORT	BLDG_TBL	0
> Root > Set Up SACR > Foundation Tables > Facilities > Facility Table > Facility	FACILITY_TBL	1	SetID	SETID	SETID	FACILITY_TBL	1
		3	Facility ID	FACILITY_ID	FACILITY_ID	FACILITY_TBL	1
		4	Effective Date	EFFDT	EFFDT	FACILITY_TBL	1
		5	Description		DESCR	FACILITY_TBL	5
		6	Status	EFF_STATUS	EFF_STATUS	FACILITY_TBL	1035
		7	Status Descr		XLATSHORTNAME	PSXLATITEM	21
		8	Building	BLDG_CD	BLDG_CD	FACILITY_TBL	1039
		9	Building Descr		DESCRSHORT	BLDG_TBL	21
		10	Room	ROOM	ROOM	FACILITY_TBL	1
		11	Capacity	ROOM_CAPACITY	ROOM_CAPACITY	FACILITY_TBL	1
		13	Room Characteristic	ROOM_CHRSTC	ROOM_CHRSTC	FACILITY_CHRSTC	8
		14	Description		DESCR	ROOM_CHRSTC_TBL	17
		15	Quantity	ROOM_CHRSTC_QUANT	ROOM_CHRSTC_QUANTI	FACILITY_CHRSTC	0
		17	Facility Black-Out Nbr	FACIL_BLACKOUT_NBR	FACIL_BLACKOUT_NBR	FACIL_BLACK_OUT	0
		18	Start Time	START_TIME	START_TIME	FACIL_BLACK_OUT	0
		19	End Time	END_TIME	END_TIME	FACIL_BLACK_OUT	0
		27	Monday		MON	FACIL_BLACK_OUT	0
		28	Tuesday		TUES	FACIL_BLACK_OUT	0
		29	Wednesday		WED	FACIL_BLACK_OUT	0
		30	Thursday		THURS	FACIL_BLACK_OUT	0
		31	Friday		FRI	FACIL_BLACK_OUT	0
		32	Saturday		SAT	FACIL_BLACK_OUT	0
		33	Sunday		SUN	FACIL_BLACK_OUT	0
> Root > Set Up SACR > Foundation Tables > Facilities > Facility Table > Facility Component	FACILITY_TBL	1	SetID	SETID	SETID	FACILITY_TBL	1
		3	Facility ID	FACILITY_ID	FACILITY_ID	FACILITY_TBL	1
		4	Effective Date	EFFDT	EFFDT	FACILITY_TBL	1
		5	Description		DESCR	FACILITY_TBL	5
		6	Status	EFF_STATUS	EFF_STATUS	FACILITY_TBL	1035
		7	Status Descr		XLATSHORTNAME	PSXLATITEM	21
		8	Building	BLDG_CD	BLDG_CD	FACILITY_TBL	1039
		9	Building Descr		DESCRSHORT	BLDG_TBL	21
		10	Room	ROOM	ROOM	FACILITY_TBL	1
		11	Capacity	ROOM_CAPACITY	ROOM_CAPACITY	FACILITY_TBL	1
		13	Facility Group		FACILITY_GROUP	DERIVED_CS	3
		14	Component Facility ID	CMPNT_FACILITY_ID	CMPNT_FACILITY_ID	FACILITY_CMPNT	8
		15	Building	BLDG_CD	BLDG_CD	FACILITY_TBL	1055
		16	Room	ROOM	ROOM	FACILITY_TBL	21
		17	Description		DESCR	FACILITY_TBL	21
		18	Room Capacity		ROOM_CAPACITY	DERIVED_CS	3
		19	Building Descr		DESCRSHORT	BLDG_TBL	21
		20	Capacity	ROOM_CAPACITY	ROOM_CAPACITY	FACILITY_TBL	21
		22	Main Facility ID	MAINFACILITYID	FACILITY_ID	FACIL_CMPNT4_VW	1
		23	Building	BLDG_CD	BLDG_CD	FACIL_CMPNT4_VW	1035
		24	Effective Date	EFFDT	EFFDT	FACIL_CMPNT4_VW	1
		25	Capacity	ROOM_CAPACITY	ROOM_CAPACITY	FACIL_CMPNT4_VW	1
		26	Room	ROOM	ROOM	FACIL_CMPNT4_VW	1
		27	Building Descr		DESCRSHORT	BLDG_TBL	21
		28	Work Component Facility ID		CMPNT_FACILITY_ID	FACIL_CMPNT4_VW	3
> Root > Set Up SACR > Foundation Tables > Facilities > Facility Table > Facility Table	FACILITY_TBL	1	SetID	SETID	SETID	FACILITY_TBL	1
		2	Read Data Flag		READ_DATA	DERIVED_CS	3
		4	Facility ID	FACILITY_ID	FACILITY_ID	FACILITY_TBL	1
		5	Effective Date	EFFDT	EFFDT	FACILITY_TBL	0

path_label_pgtab	PORTAL_URI_SEG2	FIELD NUM	LBLTEXT	LABEL_ID	FIELDNAME	RECNAME	FIELD USE
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		8	**Short Description**	DESCRSHORT	**DESCRSHORT**	FACILITY_TBL	0
		9	**Facility Group**	FACILITY_GROUP	**FACILITY_GROUP**	FACILITY_TBL	1
		10	**Building**	BLDG_CD	**BLDG_CD**	FACILITY_TBL	8
		11	**Description**		**DESCR**	BLDG_TBL	17
		12	**Room**	ROOM	**ROOM**	FACILITY_TBL	0
		13	**Capacity**	ROOM_CAPACITY	**ROOM_CAPACITY**	FACILITY_TBL	0
		14	**Location Code**	LOCATION	**LOCATION**	FACILITY_TBL	8
		15	**Description**	DESCR	**DESCR**	HCR_LOCATION_I	21
		16	**Facility Type**	FACILITY_TYPE	**FACILITY_TYPE**	FACILITY_TBL	0
		17	**Partition**	FACILITY_PARTITION	**FACILITY_PARTITION**	FACILITY_TBL	0
		18	**Academic Organization**	ACAD_ORG	**ACAD_ORG**	FACILITY_TBL	0
		19	**General Assignment**	GENERL_ASSIGN	**GENERL_ASSIGN**	FACILITY_TBL	0
		20	**Minimum Utilization Percent**	MIN_UTLZN_PCT	**MIN_UTLZN_PCT**	FACILITY_TBL	0
		21	**Check for Facility Conflict**	FACILITY_CONFLICT	**FACILITY_CONFLICT**	FACILITY_TBL	0
		23	**Capacity**		**CMPNT_FACILITY_ID**	FACILITY_CMPNT	7
		24	**Room Capacity**		**ROOM_CAPACITY**	DERIVED_CS	3
		26	**Facility_VW Room**		**ROOM**	FACILITY_VW	3
		28	**Work Component Facility ID**		**CMPNT_FACILITY_ID**	FACIL_CMPNT4_VW	3
> Root > Set Up SACR > Foundation Tables > Facilities > Facility Table > UH CB Facility	FACILITY_TBL	1	**SetID**	SETID	**SETID**	FACILITY_TBL	1
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		4	**Effective Date**	EFFDT	**EFFDT**	FACILITY_TBL	1
		5	**Description**		**DESCR**	FACILITY_TBL	5
		6	**Status**	EFF_STATUS	**EFF_STATUS**	FACILITY_TBL	1035
		7	**Status Descr**		**XLATSHORTNAME**	PSXLATITEM	21
		8	**Building**	BLDG_CD	**BLDG_CD**	FACILITY_TBL	1039
		9	**Building Descr**		**DESCRSHORT**	BLDG_TBL	21
		10	**Room**	ROOM	**ROOM**	FACILITY_TBL	1
		11	**Capacity**	ROOM_CAPACITY	**ROOM_CAPACITY**	FACILITY_TBL	1
		12	**CB Status**	UHCB_STATUS	**UHCB_STATUS**	UHCB_DERIVED	1
		14	**CB Room**	UHCB_ROOM	**UHCB_ROOM**	UHCB_FACILITY	0
		15	**CB Facility Type**	UHCB_FACILITY_TYPE	**UHCB_FACILITY_TYPE**	UHCB_FACILITY	8
		16	**Translate Short Name**	XLATSHORTNAME	**XLATSHORTNAME**	PSXLATITEM	17
		17	**UH Facility Type**	UH_FACILITY_TYPE	**UHS_FACILITY_TYPE**	UHCB_FACILITY	0
		19	**CB Department**	DEPTID	**DEPTID**	UHCB_FAC_DEPTS	0
		20	**CB Use**	CB_DEPT_USE	**UHCB_DEPT_USE**	UHCB_FAC_DEPTS	0
		21	**Percentage**	PERCENTAGE	**PERCENTAGE**	UHCB_FAC_DEPTS	0
		23	**UH Department**	DEPTID	**DEPTID**	UHS_FAC_DEPTS	0
		24	**UH Use**	DEPT_USE	**UHS_DEPT_USE**	UHS_FAC_DEPTS	0
		25	**Percentage**	PERCENTAGE	**PERCENTAGE**	UHS_FAC_DEPTS	0
		27	**CIP Code**	CIP_CODE	**CIP_CODE**	UHCB_DEPT_FACLT	8
		28	**Description**	DESCR40	**DESCR40**	UHS_CIPFCLTY_VW	17
		29	**CB Use Cd**	CB_DEPT_USE	**UHCB_DEPT_USE**	UHCB_DEPT_FACLT	0
		30	**UH Department**	DEPTID	**DEPTID**	UHCB_DEPT_FACLT	8
		31	**Description**	DESCR	**DESCR**	DEPT_TBL	17
		32	**Department Use**	DEPT_USE	**UHS_DEPT_USE**	UHCB_DEPT_FACLT	0
		33	**Percentage**	PERCENTAGE	**PERCENTAGE**	UHCB_DEPT_FACLT	0
		34	**CIP Code**	CIP_CODE	**CIP_CODE**	UHS_DEPTCIP_TBL	19
		36	**Floor Number**	FLOOR_NUMBER	**UHS_FLOOR_NUMBER**	UHCB_FACILITY	0
		37	**Usable Area**	USABLE_AREA	**UHS_USABLE_AREA**	UHCB_FACILITY	1
		38	**Main Length**	LENGTH	**UHS_LENGTH**	UHCB_FACILITY	0
		39	**Assignable Area**	ASSIGNABLE_AREA	**UHS_ASSGNBL_AREA**	UHCB_FACILITY	1
		40	**Main Width**	WIDTH	**UHS_WIDTH**	UHCB_FACILITY	0
		41	**Education & General Area**	GEN_EDUC_AREA	**UHS_GEN_EDUC_AREA**	UHCB_FACILITY	1
		42	**Calculate Square Footage**	UHCB_BUTTON_2	**UHCB_BUTTON_2**	UHCB_DERIVED	0
		44	**Alcove Number**	SEQNO	**SEQNO**	UHS_ALCV_DMNSNS	0
		45	**Length**	LENGTH	**UHS_LENGTH**	UHS_ALCV_DMNSNS	0
		46	**Width**	WIDTH	**UHS_WIDTH**	UHS_ALCV_DMNSNS	0

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		3	Facility ID	FACILITY_ID	FACILITY_ID	FACILITY_TBL	1
		4	Effective Date	EFFDT	EFFDT	FACILITY_TBL	1
		5	Description		DESCR	FACILITY_TBL	5
		6	Status	EFF_STATUS	EFF_STATUS	FACILITY_TBL	1035
		7	Status Descr		XLATSHORTNAME	PSXLATITEM	21
		8	Building	BLDG_CD	BLDG_CD	FACILITY_TBL	1039
		9	Building Descr		DESCRSHORT	BLDG_TBL	21
		10	Room	ROOM	ROOM	FACILITY_TBL	1
		11	Capacity	ROOM_CAPACITY	ROOM_CAPACITY	FACILITY_TBL	1
		13	Floor Number	FLOOR_NUMBER	UHS_FLOOR_NUMBER	UHCB_FACILITY	1
		14	Usable Area	USABLE_AREA	UHS_USABLE_AREA	UHCB_FACILITY	1
		15	Main Length	LENGTH	UHS_LENGTH	UHCB_FACILITY	1
		16	Assignable Area	ASSIGNABLE_AREA	UHS_ASSGNBL_AREA	UHCB_FACILITY	1
		17	Main Width	WIDTH	UHS_WIDTH	UHCB_FACILITY	1
		18	Education & General Area	GEN_EDUC_AREA	UHS_GEN_EDUC_AREA	UHCB_FACILITY	1
		20	Alcove Number	SEQNO	SEQNO	UHS_ALCV_DMNSNS	0
		21	Length	LENGTH	UHS_LENGTH	UHS_ALCV_DMNSNS	0
		22	Width	WIDTH	UHS_WIDTH	UHS_ALCV_DMNSNS	0
> Root > Set Up SACR > Foundation Tables > Facilities > Room Characteristics Table > Room Characteristics Table	ROOM_CHRSTC_TBL	1	Room Characteristics Table	ROOM CHRSTCS TBL	ROOM_CHRSTCS_TBL	DERIVED_AS_LBL	1027
		3	Room Characteristic	ROOM_CHRSTC	ROOM_CHRSTC	ROOM_CHRSTC_TBL	1
		4	Effective Date	EFFDT	EFFDT	ROOM_CHRSTC_TBL	0
		5	Status	EFF_STATUS	EFF_STATUS	ROOM_CHRSTC_TBL	0
		6	Description	DESCR	DESCR	ROOM_CHRSTC_TBL	0
		7	Short Description	DESCRSHORT	DESCRSHORT	ROOM_CHRSTC_TBL	0
Grand Total							

UNIVERSITY of HOUSTON

PLANT OPERATIONS

IWMS FAMIS IMPLEMENTATION

ADMINISTRATION AND FINANCE

October 25, 2010

AGENDA

UNIVERSITY of HOUSTON
PLANT OPERATIONS

- **Opening** 2:00 – 2:05pm
- **Facilities Planning and Construction – Business Needs** 2:05 – 2:20pm

  Spencer Moore, Exec. Director, Facilities Planning
- **Facilities Management – Business Needs** 2:20 – 2:35pm

  Melissa Rockwell, Exec. Director, Facilities Management
- **Project Organization Structure and Major Milestones** 2:35 – 2:50pm

  Rita Barrantes, Assoc. to CIO and UIT Project Mgr
- **Break** 2:50 – 3:00pm
- **FAMIS – Project Team Kickoff** 3:00 – 4:00pm

  Steve Drueke, Accruent Project Manager

SOFTWARE SELECTION

- Evaluation September 2009 – March 2010
- Decision for **one fully-integrated Enterprise Facility Management** system vs. multiple systems because of significant cost savings, increased efficiency, and improved control.
- A seamless integration to **PeopleSoft** was a mandatory requirement in the selection criteria
- FAMIS selected to meet both SPACE management and FACILITY management needs, including **Environmental Health and Safety** (EHS) and **Residential Life and Housing** (RLH)

SPACE MANAGEMENT

UNIVERSITY of HOUSTON
PLANT OPERATIONS

BUSINESS NEEDS

- Compliance with CB facilities reporting requirements
- Compliance with Circular A-21 Requirements for the facilities portion of the Facilities & Administrative (F&A) Indirect Cost recovery
- IRS reporting requirements for private and public use of facilities that are bonded with interest-free bonds
- Accurate and detailed facilities data needed for internal decision making – occupancy, move management, etc.
- Integration with **PeopleSoft** for Class scheduling

SPACE MANAGEMENT

UNIVERSITY of HOUSTON
PLANT OPERATIONS

The FAMIS Space Module will:

- Utilize an annual **web based space survey** to update facilities data. Provide an online interface for maintaining accurate levels of room data using both space audits and space update request.
- Provide **accurate drawings and detailed space reports** accessible to all college business administrators and designated space representatives for each college/division and department.
- Allow designated space representatives to **view and update space data** as changes occur .
- **Track changes** associated with all room information updates including occupants, grants, program codes, etc

SPACE MANAGEMENT

UNIVERSITY of HOUSTON
PLANT OPERATIONS

INDIRECT COST RECOVERY

- The University of Houston's current combined F&A Rate is 50%
  - Facilities component - 24%
  - Administrative component - 26%.
- The annual space allocation survey results are crucial in preparing an accurate and defendable F&A Rate Proposal.

FAMIS will allow us to:

- Distinguish and track separately, the space assigned specifically to a department conducting research down to the occupant level or grant level.
- Support different space allocation rules e.g. by grant, researcher, room type, program, etc.

INDIRECT COST RECOVERY

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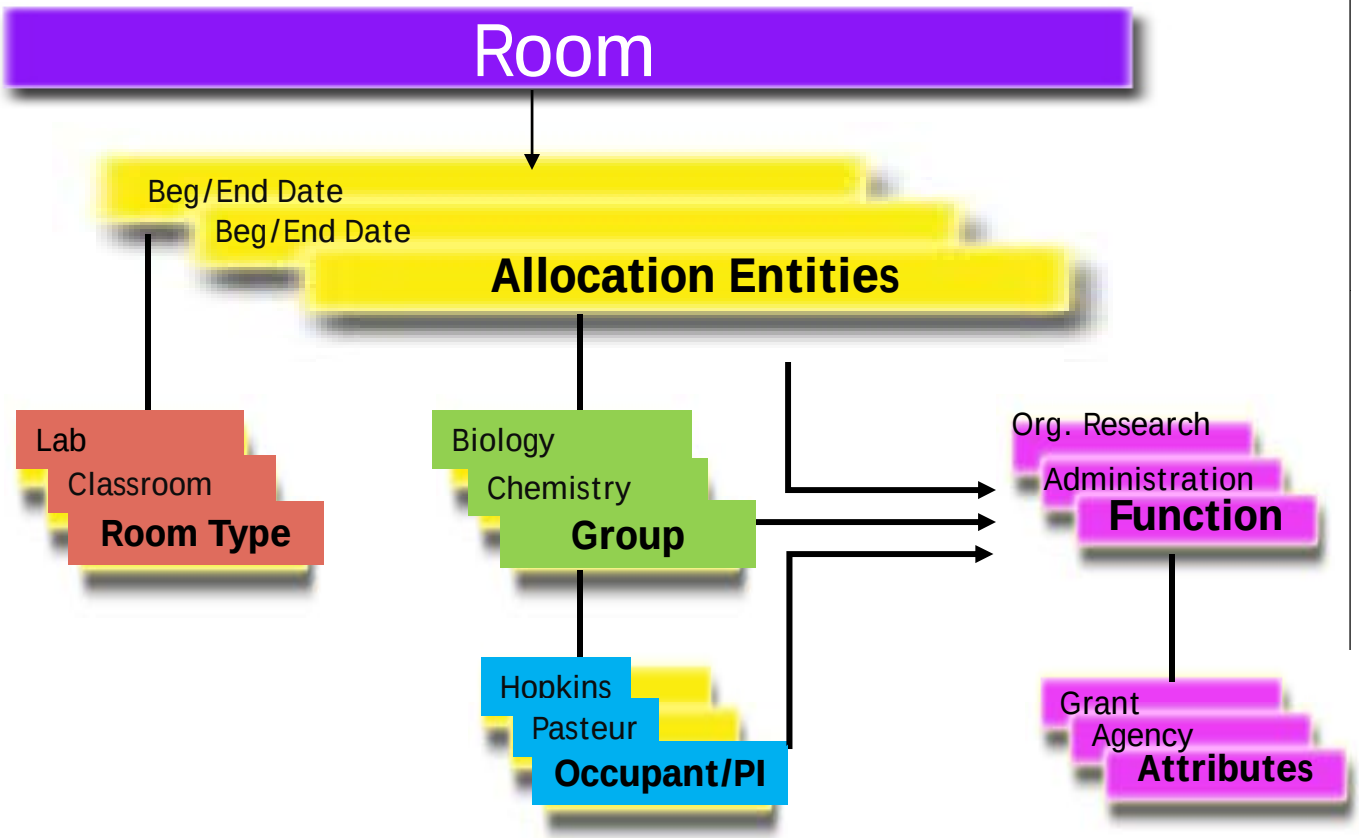
PLANT OPERATIONS

- Multiple Approaches
- Prorated Assignment
  - Room Type
  - Occupying Group
  - Occupant
  - Functional Use
- Prorated Usage
  - Room
  - Dept/Group
  - Occupant
- Assignable Cost Level
  - Room Type



FACILITY MANAGEMENT

UNIVERSITY of HOUSTON
PLANT OPERATIONS

BUSINESS NEEDS

- A web-enabled work-order system that will allow a more efficient process of reporting and follow-up of work-orders.
- Information for facilities managers to become more proactive instead of reactive to facilities' requirements and enable better decision making.
  - Tracking and management of planned work
  - Backlog
  - Reports and Productivity Tracking by Service Area
  - Joint system with Residential Life Work Management
  - Programmed Maintenance program development for warranty management

FACILITY MANAGEMENT

UNIVERSITY of HOUSTON
PLANT OPERATIONS

Other Business Benefits of Updated and Efficient Work Order System

- Efficient and streamlined processes - using standardized data that is shared across the university.
  - Key resource for Building Coordinator Program and Facility Wide Reporting
- Improve safety and environmental planning capabilities, reducing risk from accident and regulatory compliance violations.
- Data standardization across the university and the elimination of redundant information held by multiple organizations in various degrees of quality and accuracy.
- Fast and accurate reporting on critical facilities information.
- EHS will be utilizing system and phasing and sharing of work orders will benefit customers and improve services including research support

FACILITY MANAGEMENT

UNIVERSITY of HOUSTON
PLANT OPERATIONS

The FACILITY MANAGEMENT Modules include

- Physical plant work order management
- Preventive maintenance
- Maintenance projects
- Resource scheduling/labor tracking
- Inventory control
- Purchasing
- Self-service request management
- Key control
- Asset Inventory

FACILITY MANAGEMENT

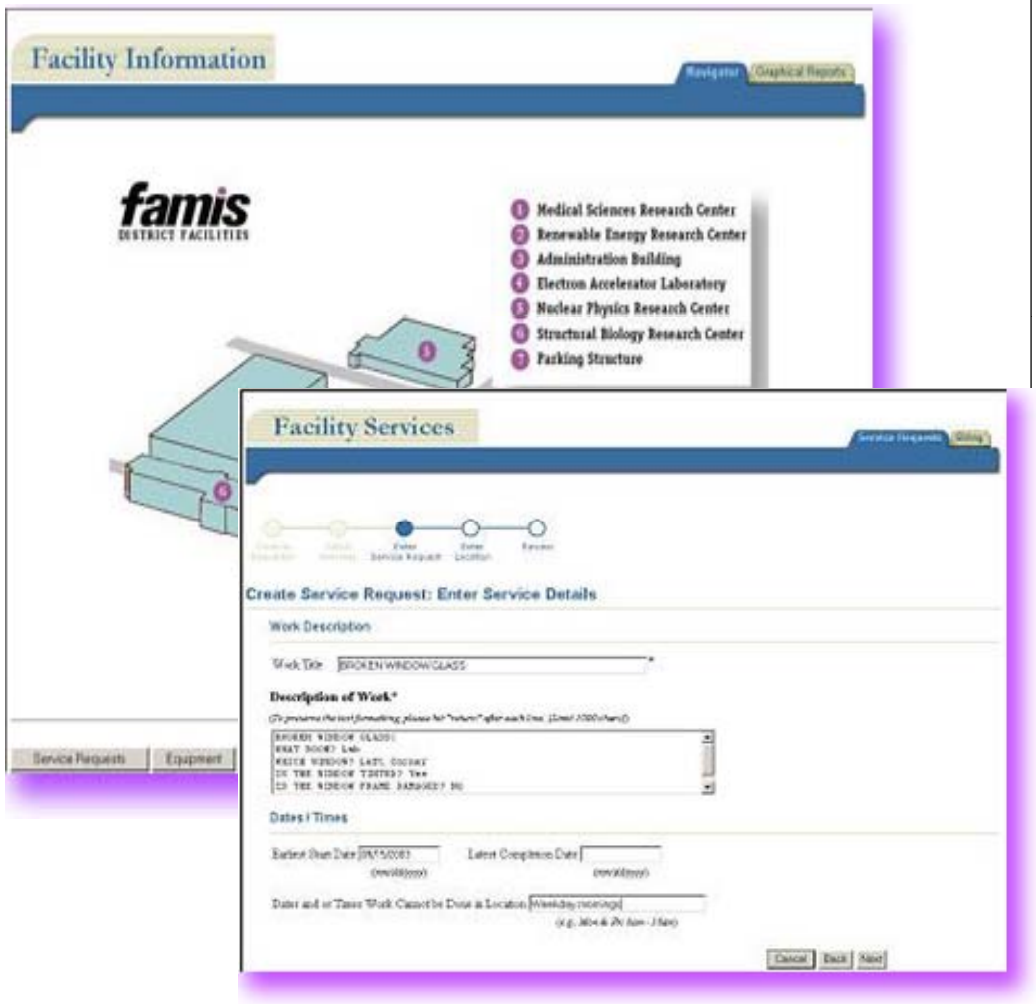
UNIVERSITY of HOUSTON
PLANT OPERATIONS

Self-Service

- Easy to use
- Simplifies customer

  involvement/feedback

  -Web based customer access
- Off-load work control center from phones
- Manage queries & status checks
- Graphical Navigation
- Email Notification
- Customizable



FACILITY MANAGEMENT

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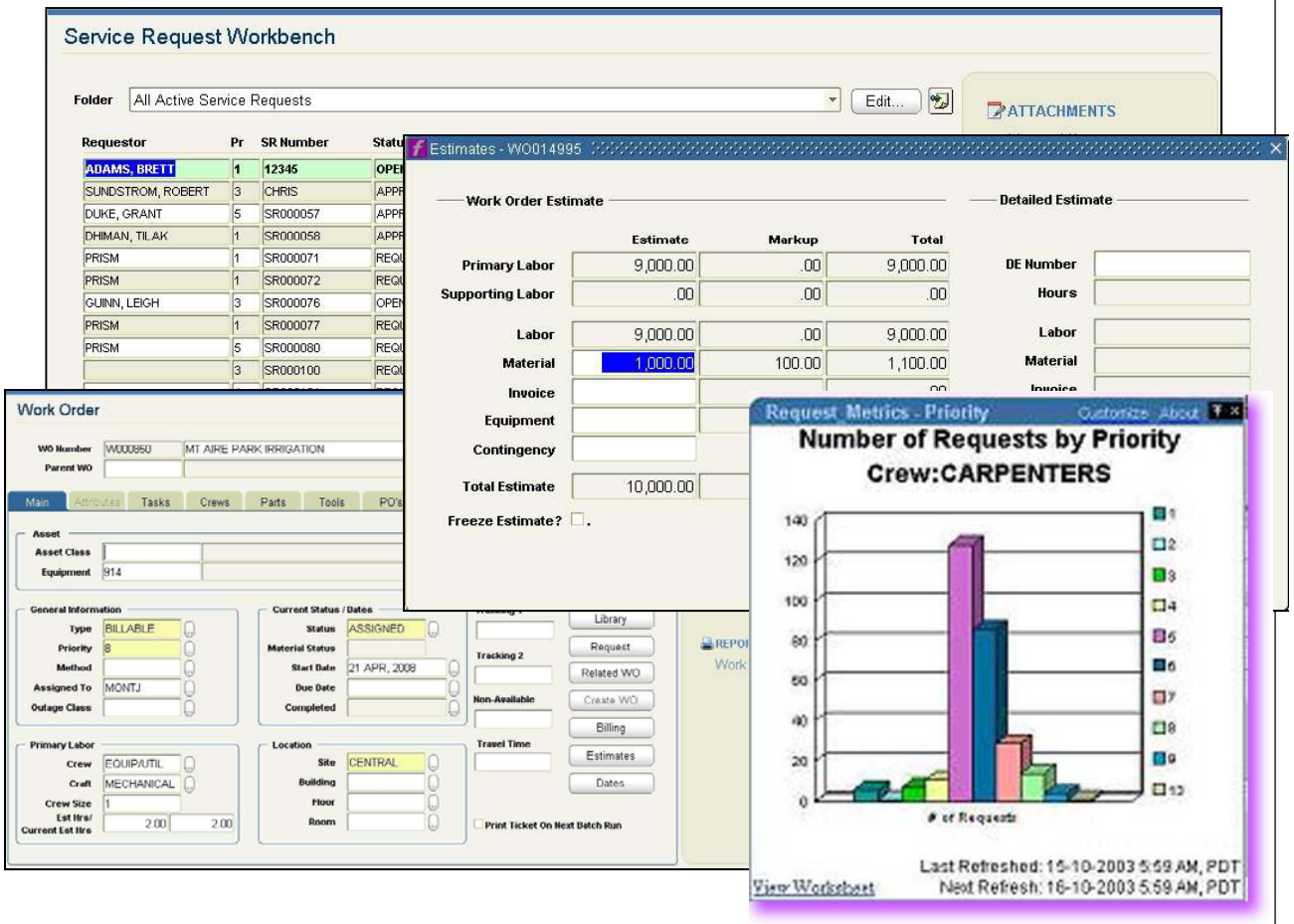
PLANT OPERATIONS

Corrective Work Orders

Preventive Work Orders

- Configurable
- Workbenches
- Streamline
- Scheduling
- Simple workflow
- Flexible costing

BETTER WORK PLANNING!



FACILITY MANAGEMENT

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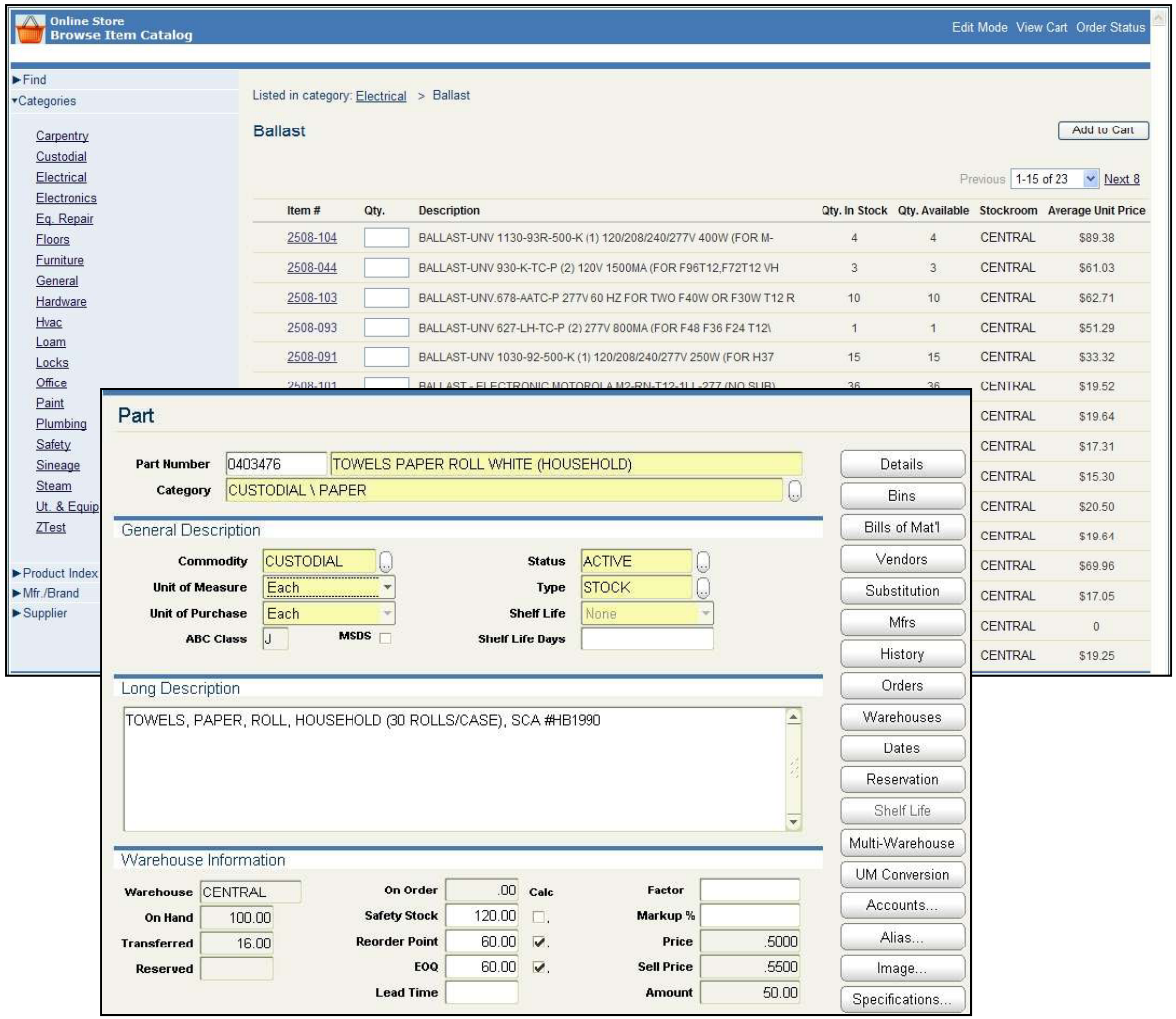
PLANT OPERATIONS

Inventory

- Parts Management
- Replenishment
- Multiple Warehouses
- Cycle Counting
- Cost Tracking
- Histories
- Intuitive queries



FACILITY MANAGEMENT

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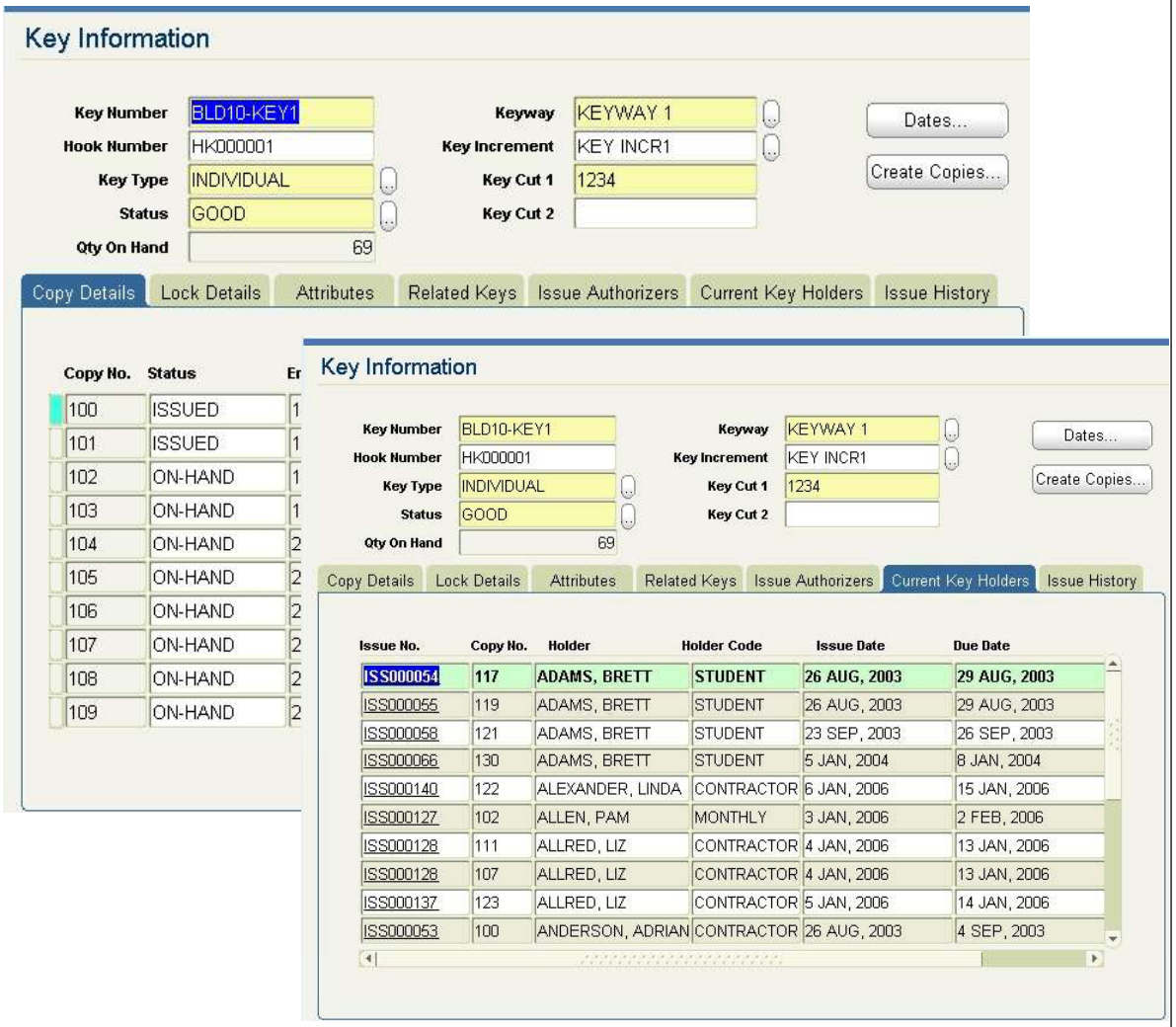
PLANT OPERATIONS

Key Control

- Set Up Locks & Keys
- Lock/Key Assoc
- Track Issues, History, Holders
- Returns and Reassignments
- Cross-charges
- Integrated to Space Mgmt System



FACILITY MANAGEMENT

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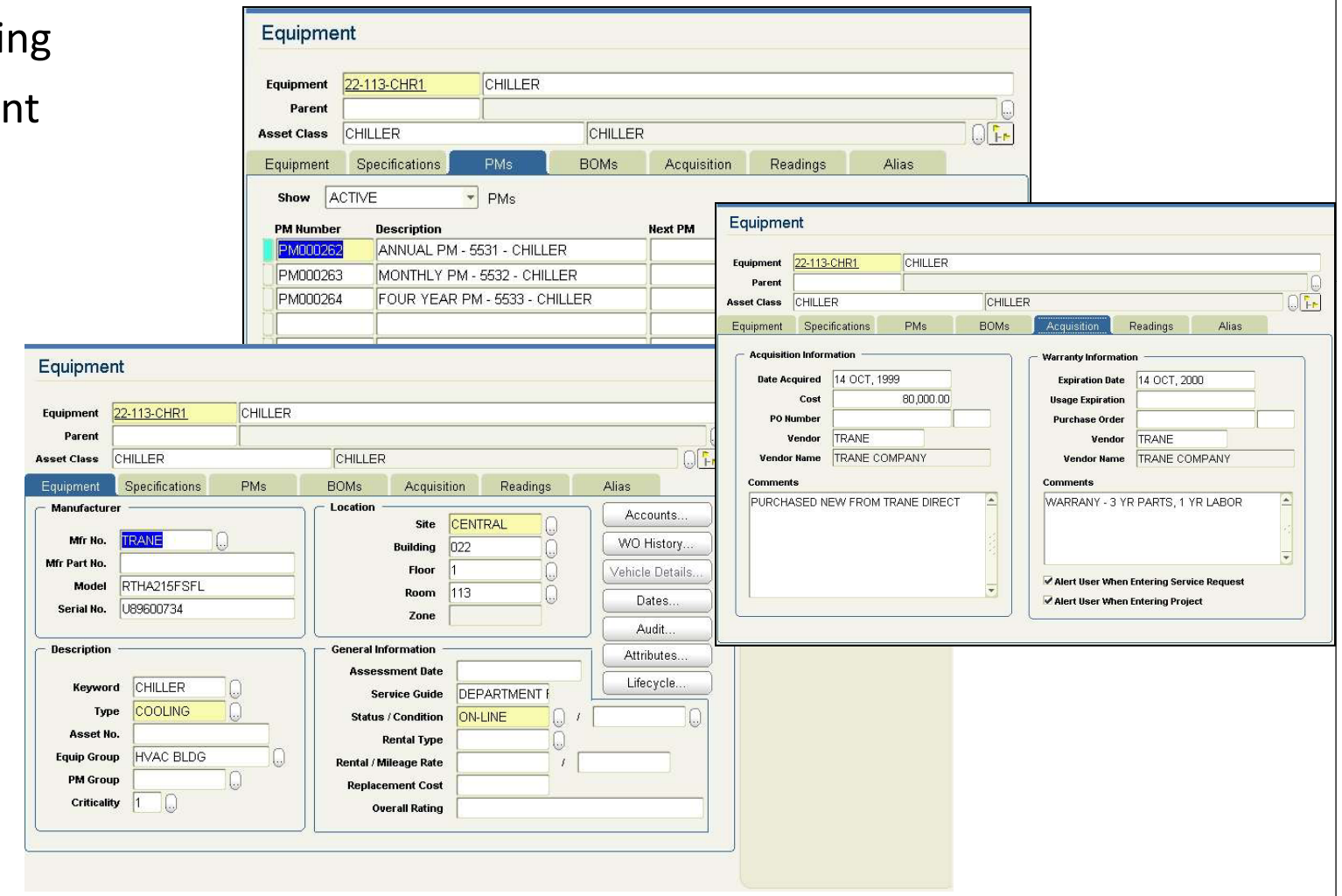
PLANT OPERATIONS

Asset Tracking

- Equipment
- Facilities
- Vehicles
- History



PROJECT TIMELINE (Estimate)

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PLANT OPERATIONS