

Rise of the New Role

Summary



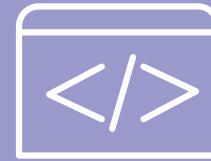
Challenge

1. Technology
2. Budget/Time
3. Change



Strategy

1. Common Terminology and collaboration with IT
2. Make the FM jobs easier
3. Change Management



Tactics

1. FM:Systems screenshots
2. Automation, Feeds
3. Change Management Documents



Takeaways

1. FM:Systems can bring it all together
2. Reduce duplication & improve process flow
3. Document, communicate, collaborate

Rise of the New Role

How Technology is changing Facility Management

Sharon Langfield, Ridgeview Medical Center

Rhonda Rezac, RSP i_SPACE

01

The impact of Technology on the Facility Manager

Technology, budgets, time and change all play a role.

02

Evolving the Facility Management Industry

Making the FM's job easier.

03

Rise of a New Role

How you can make it happen.

04

Tactics and Takeaways

Including lessons learned.

Presenters



Sharon Langfield

Asset Manager of Connected Technology
Ridgeview Medical Center



Rhonda Rezac

FMP, Business Analyst
RSP i_SPACE

Contributors – *thank you!*



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Application Manager
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Sr. Manager, Facility Systems Strategist
HCSC



The VALUE of TECHNOLOGY

Technology is helping us link the physical world with the digital world.

Facility Managers are collecting data from these technologies and assets to create and show value.

Who is managing data from
multiple technologies or IoT?



CHALLENGE: The impact of technology on the Facility Managers

Technology itself

Budget and time limitations

Change



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The impact of technology on the Facility Managers

Technology itself

Budget and time limitations

Change



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STRATEGY: Evolving Facility Management Industry

Collaboration with IT

Common terminology

Make the FM's job easier

Change management



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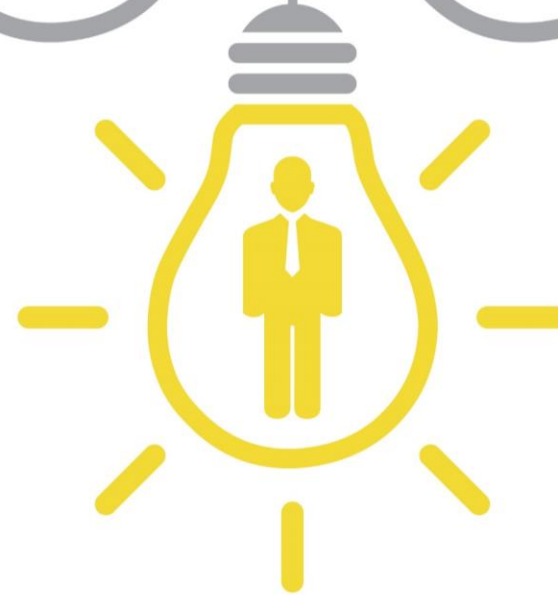
STRATEGY: Evolving Facility Management Industry

Collaboration with IT

Common terminology

Make the FM's job easier

Change management



RESULT: Rise of a New Role

Asset Manager = Tsar

Break down the silos



TACTICS: Find a Friend in IT

Technology Journey Map

Implement a Change Management Process

Bridge the gap between IT and Facilities





Interview Stakeholders

Document current applications and technologies

Understand gaps and overlaps of technology and data



Assess reporting and analytics needs – what story do you need to tell

Develop and document requirements

Hold strategy meetings - get your champions on board



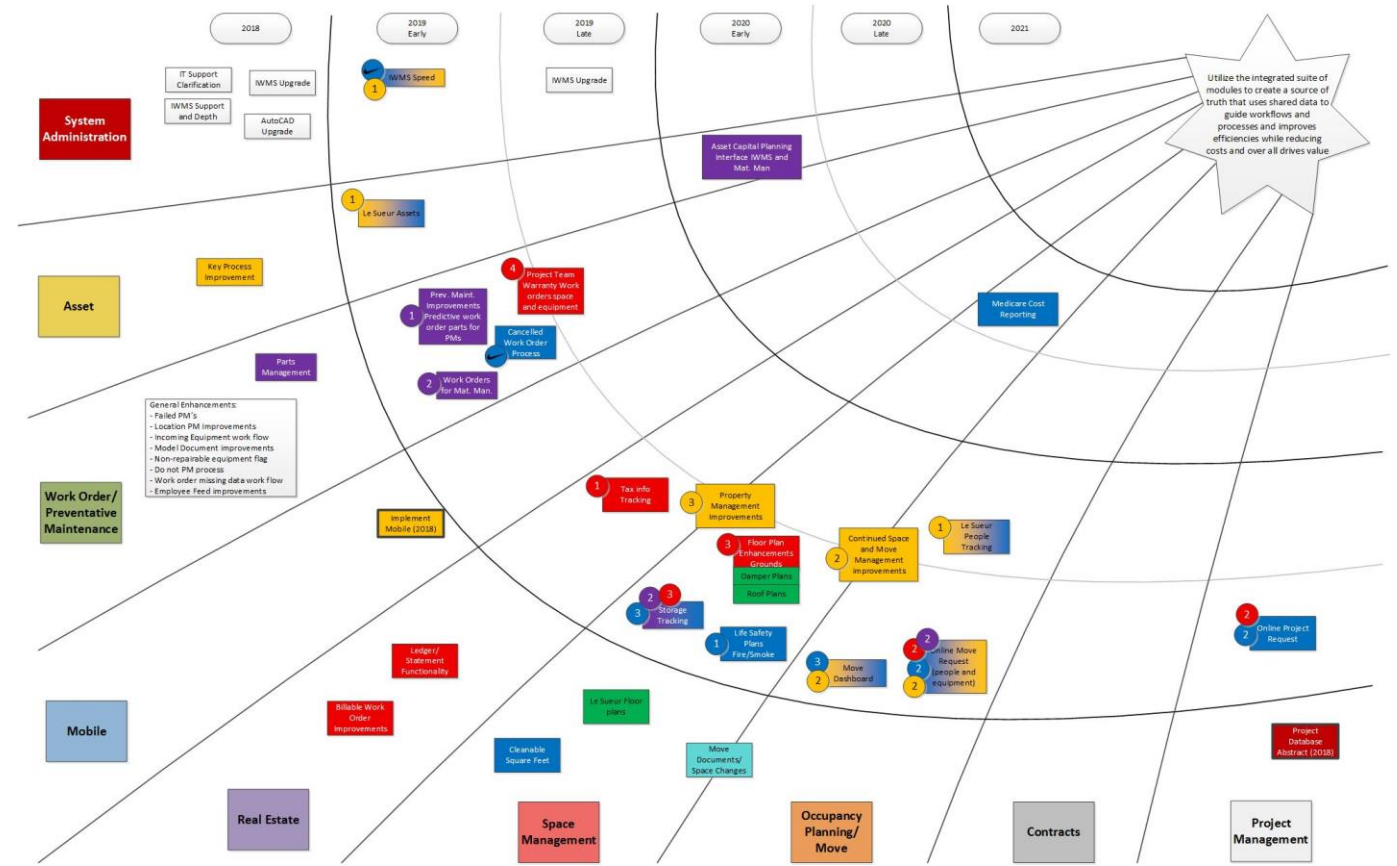
Document the strategy

Develop and prioritize your technology roadmap

Define your analytics and **Tell your story**

Change Management: Journey Map

Used to help us look out 2-3 years to determine what type of projects we want to do, and what is reasonable.



Key Management

Track Keys

What they belong to

Who has a copy

Details

Key # 057

Next Level Master

Master Key Description

EV/XP

Notes This key is for the computer cabinet in the RMP training room

People Assigned Key



<input type="checkbox"/>	DISP_NAME	Job Title
<input type="checkbox"/>	<input type="button" value="Edit"/> Melissa	Supervisor HR
<input type="checkbox"/>	<input type="button" value="Edit"/> Peggy	Administrative Assistant- Real Estate
<input type="checkbox"/>	<input type="button" value="Edit"/> Sandy	Coordinator- Organizational Development

Spaces Key Assigned

<input type="checkbox"/>	BLDGRMID	Space Type	Room Name
<input type="checkbox"/>	<input type="button" value="Edit"/> WAC_RMP 2-350	A-CONFR-DPT	Training Room


Parts Needed

Tabs in a view to start our vision of knowing what parts are needed before a PM generates the need.

Details	Equipment	Locations	Attached Documents	Rotation Assignments	PM Schedule	Parts
Parts Needed?			<input checked="" type="checkbox"/>			
What parts are needed?			Interstate Battery SLA1005 \$21.95 ea PO 152259			

Storage Management

Helps us understand how the storage space is used and who “owns” the space.

Storage	Count
 Med Gas Storage	1
 Storage - Department	18
Total	19



Storage Locations														
Edit Multiple														
<input type="checkbox"/>	Bldg	Building	City	Floor	Room #	Room Type	Room Name	Cost Center	Med Gas Stored	Art	Attic Stock	Equipment	Storage Space Types	Organizational Storage
<input checked="" type="checkbox"/>	Edit	WAC_HOS	Ridgeview Medical Center	Waconia	02	2-S250	Department Storage	Equipment Storage	7145	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	169.52
<input type="checkbox"/>	Edit	WAC_HOS	Ridgeview Medical Center	Waconia	03	3-NESTR	Stair	North East Stair	7215	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	189.38
<input type="checkbox"/>	Edit	WAC_RPB	Ridgeview Professional Building	Waconia	-02	P-418	Undesignated	Separation Room	T2004	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	146.03
<input checked="" type="checkbox"/>	Edit	WAC_HME	Home Medical Equipment	Waconia	01	1-101	Department Storage	Storage	7965	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	766.97
<input type="checkbox"/>	Edit	WAC_HOS	Ridgeview Medical Center	Waconia	03	3-NE117	Patient Room	Birthing Suite 2	7215	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	353.83
<input type="checkbox"/>	Edit	CHS_PLZ	Chaska Medical Plaza	Chaska	RF	R1-B	Roof	Area B		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	23,803.96
<input type="checkbox"/>	Edit	CHS_PLZ	Chaska Medical Plaza	Chaska	01	1-123H	Cubicle	Workstation	7525	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	39.06
<input type="checkbox"/>	Edit	CHS_TTM	Two Twelve Medical Center	Chaska	02	2-341	Waiting - DPT	Sub Wait	T2008	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	64.95
<input type="checkbox"/>	Edit	WAC_RMP	Ridgeview Medical Place	Waconia	02	2-210	Circulation - DPT	Circulation	7390	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	206.07
<input type="checkbox"/>	Edit	WAC_RPB	Ridgeview Professional Building	Waconia	-02	P-410	Treatment Room	Treatment Room	T2004	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	176.19

Real Estate (LITTLE)

Using the BAS Import to help update Lease Statements and Invoices and updating the Ledger.

- RE - Ledger
- Details
- Lease Number
- Invoice Date
- Expense Type
- Expense Notes
- GL Date
- Amount
- Running Balance
- Check #
- Income/Expense/

Select Lease(s): 0001-, 0002-, 0003-, 0004-Ridge Select Start GL Date: 4/1/2018
 Select end date: 6/30/2018
 Select Invoice End Date: 6/30/2018

1 of 81 of 6 ? 100% Find | Next

STATEMENT

Date: 5/6/2019
 Lease ID: 0008

Ridgeview Medical Center, LLC
 500 S. Maple
 Waconia, MN 55387
 Phone: 952-442-2191
 www.ridgeviewmedical.org

BILL TO:
 Chaska Center Drug, PC
 111 Chaska Center Drug, PC
 111 Chaska Center Drug, PC Ste 100
 Chaska, MN 55318

Date	Expense Type	Expense Notes	Amount
4/1/2018	Balance Forward		\$4,540.18
5/1/2018	Common Area Maint	Rent	\$3,371.32
5/1/2018	Other	4/1/2018 Electrical Electric Chg 02/01/2018 - 02/28/2018	\$94.32
5/1/2018	Rent	4/1/2018 Common Area Maintena	\$798.00
6/1/2018	Common Area Maint	4/1/2018 Other Estimated Managment Fee/Month	\$127.05
6/1/2018	Electrical	4/18/2018 Payment	(\$4,388.89)

Date	Expense Type	Expense Notes	GL Date	Amount	Running Balance	Check #	Income/Expense/Contra	Cost Center	Building Code	Lease Number	Lease Name	Date Added	Entered By	Sub-Account
6/1/2019	Electrical	Electric Chg 04/01/2019 - 04/30/2019	6/1/2019 12:00:00 AM	115.36	9,861.69		Expense		CHS_TTM	0008	Chaska Center Drug, PC	5/5/2019	Automatic	76030
5/1/2019	Management Fee		5/1/2019 12:00:00 AM	131.48	9,746.33		Expense	T2010	CHS_TTM	0008	Chaska Center Drug, PC	4/20/2019	Automatic	75168
5/1/2019	Rent		5/1/2019 12:00:00 AM	3,439.16	9,614.85		Expense		CHS_TTM	0008	Chaska Center Drug, PC	4/20/2019	Automatic	75166
5/1/2019	Common Area Maintenance		5/1/2019 12:00:00 AM	949.21	6,175.69		Expense	T2010	CHS_TTM	0008	Chaska Center Drug, PC	4/20/2019	Automatic	75168
5/1/2019	Electrical	Electric Chg 03/01/2019 - 03/31/2019	5/1/2019 12:00:00 AM	113.06	5,226.48		Expense		CHS_TTM	0008	Chaska Center Drug, PC	4/5/2019	Automatic	76030
5/1/2019	Work Order	WO# 51418, 51749	4/23/2019 12:00:00 AM	83.49	5,113.42		Income	T2010	CHS_TTM	0008	Chaska Center Drug, PC	4/23/2019	Kalli...	
4/12/2019	Payment		4/12/2019 12:00:00 AM	-4,633.69	5,029.93	9248			CHS_TTM	0008	Chaska Center Drug, PC	4/12/2019	Jill...	
4/2/2019	Payment		4/2/2019 12:00:00 AM	-4,779.16	9,663.62	9240			CHS_TTM	0008	Chaska Center Drug, PC	4/2/2019	Jill...	
4/1/2019	Rent		4/1/2019 12:00:00 AM	3,439.16	14,442.78		Expense		CHS_TTM	0008	Chaska Center Drug, PC	3/20/2019	Automatic	75166
4/1/2019	Management Fee		4/1/2019 12:00:00 AM	131.48	11,003.62		Expense	T2010	CHS_TTM	0008	Chaska Center Drug, PC	3/20/2019	Automatic	75168
4/1/2019	Common Area Maintenance		4/1/2019 12:00:00 AM	949.21	10,872.14		Expense	T2010	CHS_TTM	0008	Chaska Center Drug, PC	3/20/2019	Automatic	75168
4/1/2019	Electrical	Electric Chg 02/01/2019 - 02/28/2019	4/1/2019 12:00:00 AM	104.75	9,922.93		Expense		CHS_TTM	0008	Chaska Center Drug, PC	3/5/2019	Automatic	76030
4/1/2019	Common Area Maintenance	2018 CAM Reconciliation	3/27/2019 12:00:00 AM	405.33	9,818.18		Income	T2010	CHS_TTM	0008	Chaska Center Drug, PC	3/27/2019	Kalli...	75168
3/1/2019	Management Fee		3/1/2019 12:00:00 AM	131.48	9,412.85		Expense	T2010	CHS_TTM	0008	Chaska Center Drug, PC	2/20/2019	Automatic	75168
3/1/2019	Rent		3/1/2019 12:00:00 AM	3,439.16	9,281.37		Expense		CHS_TTM	0008	Chaska Center Drug, PC	2/20/2019	Automatic	75166
3/1/2019	Common Area Maintenance		3/1/2019 12:00:00 AM	949.21	5,842.21		Expense	T2010	CHS_TTM	0008	Chaska Center Drug, PC	2/20/2019	Automatic	75168

Maintenance (AMS)

Created Technician Templates and a list of Failed PM's.

Tech Templates

Template

3.7218 - WO Technician Template - ANS18, 18 Month Anesthesia Porcedure

ANS18	Date Received Range:		# of WOs	2	Hours Logged	4
	Start:	05/02/2019	End:	05/02/2019		

Work Order Values							Template Values			Hours	
WO #	RMC #	PMID	PM Description	Template	Assignee ID	Date Received	Date Complete	<i>Refer to Aestiva Operation Manual, Part 2</i>		WO Hours	
								Ohms	uA	Template Comments	
53943	27617 Anesthesia Gas Machine	913	Biomed General Template_Semi-Annual_RMC Anesthesia	ANS18	Zimmermann, Ronald	05/02/2019	05/06/2019	0.134	233		2

Testing Device(s) Used:					
RMC #	Device Category	Equipment Description	Manufacturer	Model #	Serial #
35715	Precision Testing Devices	Safety Analyzer Electric	Bio-Tek Instruments, Inc.	505 PRO	204613

Work Order Values							Template Values			Hours	
WO #	RMC #	PMID	PM Description	Template	Assignee ID	Date Received	Date Complete	<i>Refer to Aestiva Operation Manual, Part 2</i>		WO Hours	
								Ohms	uA	Template Comments	
53944	27619 Anesthesia Gas Machine	913	Biomed General Template_Semi-Annual_RMC Anesthesia	ANS18	Zimmermann, Ronald	05/02/2019	05/04/2019	0.266	51		2

Testing Device(s) Used:					
RMC #	Device Category	Equipment Description	Manufacturer	Model #	Serial #
35715	Precision Testing Devices	Safety Analyzer Electric	Bio-Tek Instruments, Inc.	505 PRO	204613

Project Management (RSP i_SPACE)

Utilizing the Project Management module
to track projects, including the financials.

The screenshot displays the RSP i_SPACE Project Management interface. The main window is titled "PM Project Information" and shows a list of projects. The first project, 61381703, is selected and its details are shown below. The details include Project Code (61381703), Project Name (Lawrenceville, IL), and Project Status (Project Complete). The Project Manager is Litschewski, Mark, and the Project Type is Project Only. The Project Status is Project Complete.

Below the project details, there are tabs for Project Summary, 1 - Kickoff, Project Finances, Project Log, Project Team, Project Details, and 8 - Project Closeout. The Project Finances tab is active, showing a Purchase Order (PO) form. The PO form includes fields for Project Code, PO Number, PO Amount, and Date Received. The Project Code is 61381703, the PO Number is 13567885, the PO Amount is 165,285.59, and the Date Received is 6/8/2018. A legend indicates that fields marked with an asterisk are required.

Project Number	Project Status	Project Name	Project Manager	Project Type	Project St
61381703	Project Complete	Lawrenceville, IL	Litschewski, Mark	Project Only	Consolida
61381602	Incomplete	Minnetonka, MN	Ambrose, Elise	Project Only	Infrastruct

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Project Code: 61381703
Project Name: Lawrenceville, IL
Project Status: Project Complete

Project Summary | 1 - Kickoff | **Project Finances** | Project Log | Project Team | Project Details | 8 - Project Closeout

Purchase Order (PO)

Add Delete

Project Code	PO Number
61381703	13567885
61381703	14367785

Purchase Order

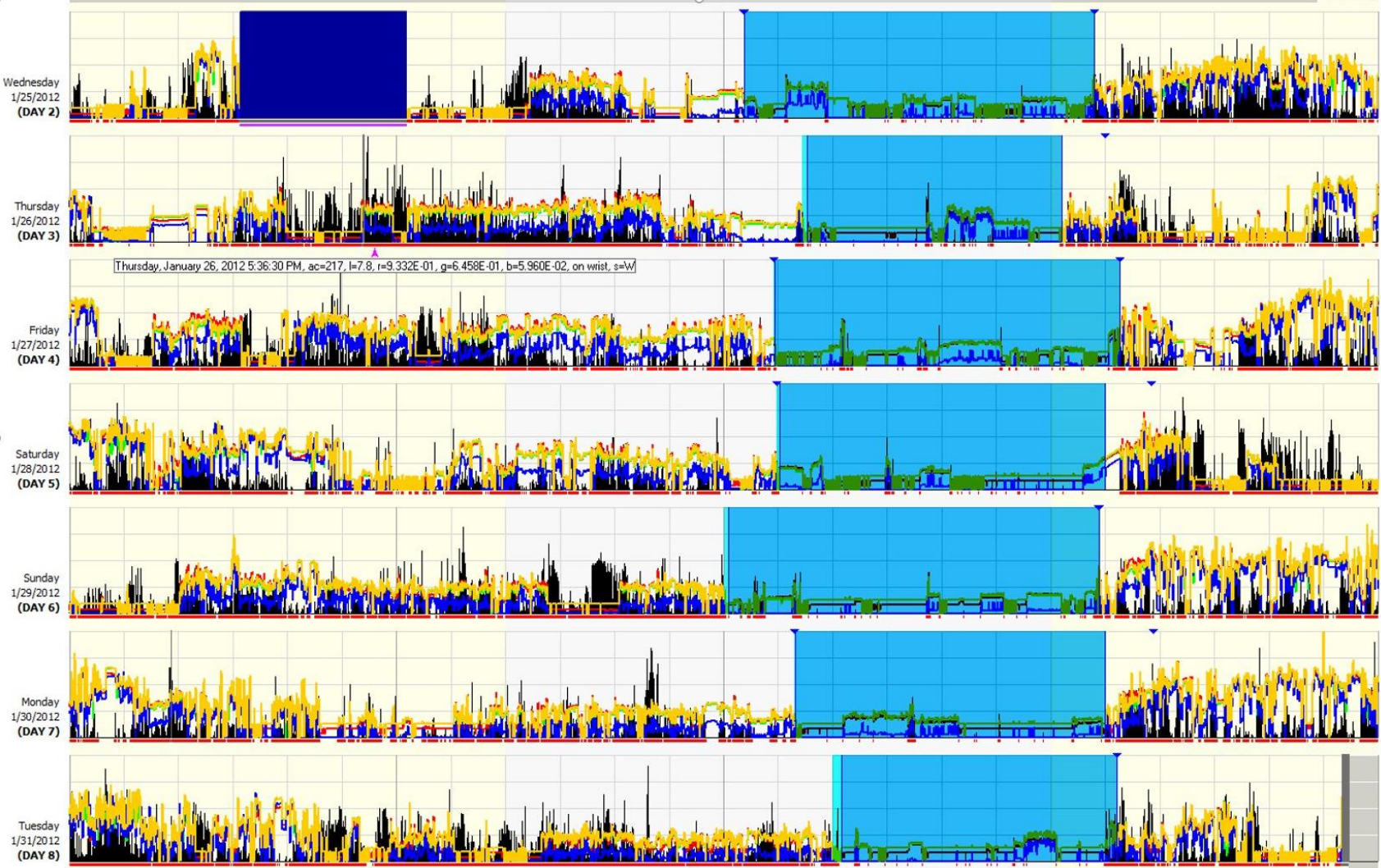
- * Project Code: 61381703
- * PO Number: 13567885
- * PO Amount: 165,285.59
- * Date Received: 6/8/2018

* Required Field

Wellbeing (RSP i_SPACE)

CoWorkr Sensors

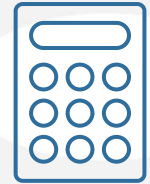
Phillips Actiwatch





HR Employee Data

Employee Number	Cost Center	Manager ID
Last Name	Login ID	Job Code
First Name	Title	
Email		
Phone		



Financial Departments

- Cost Center
- Cost Center Description
- Parent Cost Center
- Parent Cost Center Description



Project Finances

- Project Number
- PO Number
- PO Amount
- Date Received



Building Automation

- Lease ID
- Lease Name
- Income/Expense
- Kilowatt Hours Used



Change Management: Mobile Storyboard

Used to visually show team members
what a new item might look like.



Technician finding open work orders -Determining what to do

Technician comes to work

Thankfully this technician has a mobile device that they can check their work orders on.

They click on the My Assigned Service Request icon

Small dashboard for

- # of open work orders
- # of open PM's
- # over due

Link to take them to the full site...

It pulls up a list of work orders that are assigned to the technician

Filter for PM or OD

The work order list shows only the information needed

Total Records: 25 of 11598

Problem Description: A/C unit is beeping
PM Description:
Equipment: 12345, Device ca
Due Date: 9/15/2017
Location: Building and room room name

Show only if a PM

Hide if a PM

What happens when this is a list of equipment?

Clicking on the work order from the list gives more information

Work Order #: 123456
Problem Description: A/C unit is beeping
PM Description:
Equipment: 12345, Device category
Due Date: 9/15/2017
Location: Building and room including room name
Warranty: Yes
Assignees:

Show floor plan if location is clicked

Other tabs in drop down

- Equipment
- Documents

Click on Equipment to see full equipment profile

Will the My Work view work the same?

- Quick close
- Parts tab and services
- Templates

Change Management: Test Scripts

As we expand, we keep our test scripts up-to-date, so as we upgrade we know what we need to test to keep things working.

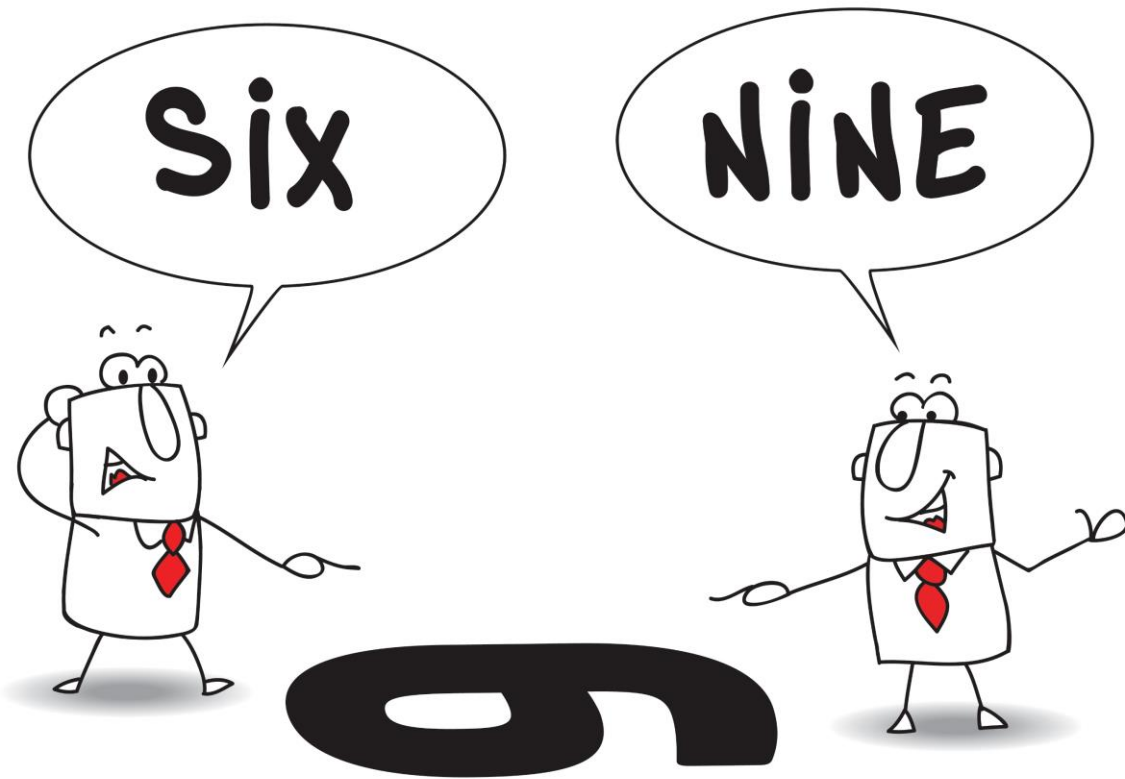
Module	View	Test Script	Pass/Fail	Notes	Lindsay	Pass/Fail	Notes	Kalli	Pass/Fail	Notes	Randy	Pass/Fail	Notes	Pat	Pass/Fail	Notes
Space	Homepage	Do you show a map or icons?	Pass	supervisor - should we have access to dashboard as a supervisor					Pass	Map		Pass	Icon			
Space	Homepage	Navigate to a floor plan	Pass	Tested functionality of way finding as well as some of the other drop down functionality.					Pass	RFB 4th floor		Pass	Belle Plaine			
Space	Floor plan	Can you change the floor plan view?	Pass	Yes - switched over to other floors					Pass			Pass				
Space	Floor plan	information regarding that specific room below the plan (i.e. space type, cost center, occupant(s), assets)	Pass	Yep I could					Pass			Pass				
Space	Info View	Can you assign someone to the room (if permissioned)							N/A			Pass	Mike K BP 1-w/109A			
Space	Info View	Can you edit the room info (if permissioned)							N/A			Pass				
Space	Info View	Can you click the link below the floor plan that says documents?	Pass	works great					N/A			Failed	Worked but went to production			
Move	Move Status Planner	Can you add a new move using the single add							N/A			Pass				
Move	Move Status Planner	Can you add using the Add Multiple button?							N/A			Pass	Paul Ham Req # 163			
Move	Move Status Planner	Can you assign rooms using the Assign Room button?							N/A			Pass				
Move	Move Status Planner	Can you post a move?							N/A			Pass				
Move	Floor plan	Find the person on the floor plan did they get updated to their new location?							N/A			Pass				
Move	Move Projects	Can you create a new move project?							N/A			Pass	Project # 011			
Move	Move Projects	Can you assign people to it?							N/A			Pass				
Move	Floor plan	Can you view the move floor plan? (from the home screen can you select the building and pull up the plan and navigate to the move plan)							N/A			Pass				
Facility Maintenance	New Service Request (End Use)	Create a new work order with equipment - Does the room needing service change when the equipment is added?	Pass						Fail	Home page - no access Link on home page says under construction		Pass	Yes			
Facility Maintenance	New Service Request (End Use)	Create a new work order without equipment - Does the room needing service change if you change the person it's requested for?	Fail	individual is assigned to one seat. If individual is assigned to two seats and forces user to select one it populates					Pass			Failed	No Changed to Steve Fowler			
Facility Maintenance	New Service Request (Technical)	Create a work order and assign it yourself and someone else in the room.	Pass	Assigned to Sharon and myself. Works and shows in dispatch properly, no email routed to Sharon					Pass			Pass				
Facility Maintenance	My Service Centers (Dispatch)	Choose a work order without equipment. - Add a piece of equipment - Does the room update? - Does the cost center change? Click Save - Does the grid update?	Pass	actually updated prior to saving. Need to continue to test as added a piece without editing the profile the grid updated. Removed the asset but the grid did not revert to no equipment.					Pass			Failed Passed	Room didn't update but the Grid did work order # 20887 added RMC #50567 did not change to 1-W255, but changed when I saved			
Facility Maintenance	My Service Centers (Dispatch)	Dispatch an unassigned work order to yourself or to someone else in the room	Pass	Selected in progress as status but it reverted back to assigned - email routed to Sharon								Pass				
Facility Maintenance	My Assigned Service Requests	Complete a work order without using the quick close form	Pass	Work order closed using non-billable (billable/non-billable not defaulted) - dispatched one using billable status when dispatching and it carried through, tested non-billable selection and it carried over												

Lessons Learned



The Dark Side of Automation

If the work to automate it exceeds the work to do it manually, then you have failed at the pursuit of automation.



Consistency Across Platforms

In order for the technologies to talk to each other,
they have to be speaking the same language.



Document, Document, Document.

If something breaks or fails,
you need to know how to fix it.

2 Overview

This write-up is derived from the Solution Design meetings held during the months of September and November 2018.

• Project Goals

The business objective is to create a neighborhood in CREWS (FM neighborhoods and tracking t

• Project Stakeholders

Below are the project stakeh

Resource Name
HCSC
Dianne Weiss
Cheryl Kumse
RSP
Rhonda Rezac

SQL Trigger Code:

```
USE [HCSC]
GO
/***** Object: Trigger
9:30:37 AM *****/
SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO
ALTER TRIGGER [dbo].[RSP]
ON [dbo].[FMMP]
AFTER INSERT, UPDATE
AS
```

3 Space Module

• Notes:

- Client has a Neighborhood
- Size and date
- Mandatory

• Permissions:

- No new roles

3.1 View Label: Zone

- ❖ View Filter:
- ❖ View Settings:
- ❖ View Order:
- ❖ View Permissions:
- ❖ Note:

Grid: Zone Type

- Type I
- Type D
- Is occu

TAB: Details

- *Type ID

```
--
=====
-- NAME:
PROJECT MOVES TRIGGER
-- AUTHOR:
-- COMPANY NAME:
-- CONTACT EMAIL:
-- CREATE DATE:
-- EDIT DATE:
-- FMS APPROVE DATE TEST
-- FMS APPROVE DATE PRO
-- VERSION:
-- DESCRIPTION:
table, this Trigger will
--
field. It will then l
--
linking the MP.MGRID wi
--
```

Populate MGR CC Trigger

Summary

Upon updating any record in the MP Move Project table, this Trigger will look into the MP Move Project table and look at the MGRID field. It will then lookup the first occurrence of the GROUP_ field in the GO table linking the MP.MGRID with the GO.MV_APPROVE field and then apply the value from the GO.GROUP_ field to all Planned Moves for the selected Move Project.

Move Project (Liaison) View

Liaison fills out the Move Project (Liaison) View and saves the changes. Any update will fire the trigger. The value in the Approving Manager ID field will be used to lookup the Cost Center number in the GO Table.

Move Project #	Project Name & Phase	Requested Move Date	Move Project Status
000000000000025	Imagine Dragons	7/4/2017	Planning Complete
000000000000026	DW Test Project 1	7/3/2017	Planning Complete

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Details

Move Project #: 000000000000025

Requested By Name: []

* Move Project Status: Select One

* Project Name & Phase: Imagine Dragons

* Reason for Move: Select One

* Requested Move Date: 7/4/2017

* Approving Manager ID: 027347 [Select] [Clear]

Save Changes [] Cancel []

then apply the value from the GO.GROUP_

Facility Technology Matrix – FM Interact Modules				
	Functionality of Module	Road mapped Items	Additional Opportunities	Functionality of Module (not road mapped)
Space	<ul style="list-style-type: none"> Buildings Created in AutoCAD (floor plans) Standardization of space data Shows Employees locations Web Portal Risk Types created, assigned and calculated Track Space allocations based on real time data Allocation/chargebacks Space Utilization Dashboards and reporting Occupancy tracking and metrics 	<ul style="list-style-type: none"> Increased Floor plan information Medicare Cost Reporting Review the use of Revit Clickable assets LeSueur Added to portfolio Data change auditing 	<ul style="list-style-type: none"> Facility Condition Assessment Clickable assets Mail stops 	
Move	<ul style="list-style-type: none"> Move process formalized Email notifications Move Tracking Move Plans Move prompts/warnings Move request form to gather pertinent data earlier Reporting and dashboards Move status tracking for requests and planners (provide visibility) Approvals 	<ul style="list-style-type: none"> Review Move process Online Move requests Increase Email notifications 		
Asset	<ul style="list-style-type: none"> Assets details Status Warranty Cost Data auditing Risk assessment Asset Contract Info Reporting and Dashboards Keys 	<ul style="list-style-type: none"> Calculate Depreciation Data auditing Historical system data tracking Equipment Moves Potential to integrate with other systems (i.e. Paragon) Historical data tracking Clickable Assets on floor plans 	<ul style="list-style-type: none"> Clickable Assets on floor plans 	
Maintenance	<ul style="list-style-type: none"> Work Order Work Flow Prioritize Work Orders Schedule Work Orders Preventative Maintenance Issue prompting, conditional responses Notifications Status tracking Reporting 	<ul style="list-style-type: none"> Online Project requests Integration with IT or work flow improvements Parts management Billable work order streamlined 		

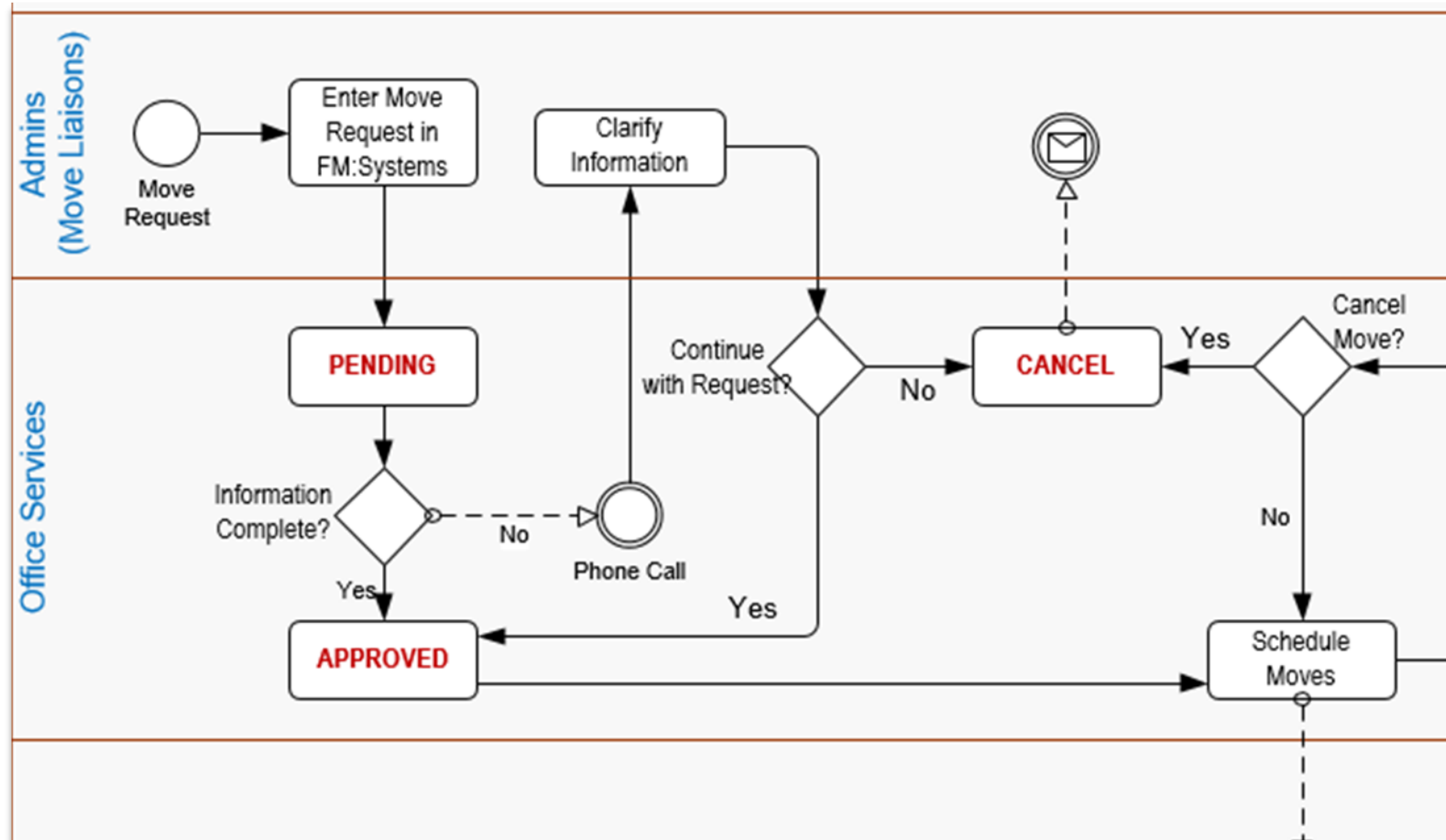


Ownership

Who owns what part?

This can change, but make sure to communicate and agree on the change so you clearly know your role.

Workflows



Roles and Responsibilities

Software	Task	Software/ Hardware/ Network	Facilities Ticket	Asset Manager - Systems	Asset Manager - Connecte	FM Tech Specialist	IT Ticket	IT User Group	IT Analyst	IT project Manager	IT Infrastructure manager	IT Network Engineer	IT Sys Admin	IT Security
P2000	Add doors	Software												
P2000	Modify doors (hours, groups)	Software		3	3	2								
P2000	Add hour schedules	Software		3	3	2								
P2000	Add access cards	Software												
P2000	Upgrade software	Software						1						
P2000	Test software	Software						1						
P2000	Assign users to AD group	Software												1
P2000	Assign users in software	Software		3	3	2								
P2000	Trouble shooting issues	Software/ Hardware/ Network	1				2							
P2000	Design (new construction/remodel/changes)	Software/ Hardware/ Network		1		2			1					
P2000	Training - Security and Dispatch	Software												
P2000	Training - Facilities Engineers	Software		2		1								
P2000	Contacting vendor, vendor relationship holder			1		1								
P2000	Manage contract			1	2									
P2000	Routine Maintenance - Remove badges	Software				3								
P2000	Routine Maintenance - Alarm Monitoring Facilities	Software		2		1								
P2000	Routine Maintenance - Data Auditing	Software												
P2000	Routine Maintenance - JCI functions													
P2000	Server Maintenance - Back up data								1					

TAKEAWAYS:

Drive your own car.

FM:Systems can help bring it all together

Reduce duplication and improve processes

Document, communicate and collaborate



Thank you!