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Vertical Industries Require Flexible & Configurable Integrated Workplace Management System (IWMS) Solutions

RETAIL, HEALTHCARE, FINANCIAL & OTHER SECTORS WITH SPECIALIZED, LIFECYCLE WORKPLACE MANAGEMENT SOLUTIONS HOLD COMPETITIVE EDGE.

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Executive Overview

The definition of "workplace" has evolved dramatically over the last decade. Mobile technology has allowed employees to break free from their cubicles and spread out throughout an office campus, green efforts have transformed traditional buildings into LEED certified centers of energy sustainability, and companies are expanding office space at a rapid pace – either building, buying, leasing or adapting workspaces to meet changing business needs.

Along with these changes, the scope of Integrated Workplace Management Systems has expanded to accommodate growing workplace needs.

Today, companies also need to balance workplace management with financial discipline, operational excellence and risk management. They must manage rising end-to-end facilities costs of maintenance and upgrades, as well as monitor the entire real estate portfolio and its space demands, capital expansions, assets and equipment. They must also ensure that building codes and environmental regulatory compliance requirements are met.

Further complicating matters -- while many of the strategic drivers for IWMS are common to all businesses, each vertical market has its own unique workplace management needs. Retailers, for instance, place a high priority on project management and facilities management needs, while the healthcare industry may be more concerned with equipment maintenance and compliance.

Without appropriate systems in place, companies face wasted resources, maintenance and operations cost overruns and overall poor financial planning. Without a portfolio view of operations, facilities can deteriorate, maintenance response times can slow, and planning for future space demands can be delayed.

How a company integrates IWMS and tweaks its business processes to address the organization's unique requirements make an IWMS solution truly valuable to the enterprise. The key is having a comprehensive IWMS solution that integrates lifecycle and data continuity with flexibility and configurability to meet specific industry needs. This white paper lays out the most important features in an IWMS solution for today's growing and highly specialized workplace environments.

The IWMS Umbrella

Most enterprises juggle several core functional areas of workplace management, which in most cases are organizationally and operationally independent.

Facilities and maintenance management

Facilities managers face the daunting task of keeping all aspects of the building up and running, as well as ready to meet the changing needs of the business. This includes strategic facilities planning, CAD and BIM integration, space management, site and employee service management, resource scheduling and move management.

Maintenance management is another essential element to the smooth operation of any facility – keeping interruptions, system failures and safety incidents to a minimum. Preventative maintenance also involves processing service requests and work orders, job plans, meter reading, material and parts inventory, material orders and their movement throughout the facility.

Within facilities management, managers must be able to assess facility conditions in a timely manner. This includes inspecting, collecting, analyzing and reporting on the condition of the entire facility or building system from top to bottom. This information is critical for budgeting and maintenance project planning

Real estate portfolio management

Companies must plan for, track and manage a diverse real estate portfolio that includes both leased and owned properties. What's more, every step of the real estate transactions process, such as site selection, acquisitions and property disposition, must be carefully monitored so that changes to compliance requirements or tax rules can be adapted, and strategic decision-making can be optimized.

Capital planning

Every company regardless of vertical industry looks to maximize the return on its project investments. Resource and budget limitations place a premium on making the right decisions on which projects to include in the capital plan. Collaboration between planners and those who execute the project is critical to ensure the most-efficient use of capital funds.

Sustainability and energy management

Over the last decade, the Green Movement in business has evolved from an eco-trendy thing to do to a practice that just makes good bottom-line business sense. Who doesn't want to be more energy efficient and lower utility bills? True sustainability and energy management requires facilities managers to measure energy and water consumption, as well as waste production and greenhouse gas emissions, within facilities – and then have a plan for reduction. IWMS tools that support sustainability and energy management should include integration with building management systems (BMS), sustainability performance metrics, energy benchmarking, carbon emissions tracking and energy efficiency project analysis.

In all of these areas, facilities executives face similar challenges with financial discipline, operational excellence and risk management. But in different vertical markets, those challenges take on a slightly different flavor that must be addressed through the flexibility and configurability of more comprehensive, lifecycle IWMS solutions. The solution must be adaptable to any vertical to let users define their own processes, incorporate their own logic, and add very specific workflows to tackle their specific needs.

Industry by Industry

Retail

The retail industry is undergoing tremendous change, and in the next five years analysts predict that stores will continue to morph into experiential destinations, according to the Professional Retail Store Maintenance Assocation.[1]

With the rush to convert retail stores into the new shopping utopia, it's easy to see that time is money. For retailers, the name of the game is speed -- how fast can they open a new or renovated store and make sales. Time to market is critical, so facilities executive are turning to project management solutions for scheduling and planning to get new stores up and running on schedule in an industry

where one missed opening during a holiday season could spell disaster for earnings. On the operational side, retailers are constantly reinventing their storefronts with renovations, updates and re-design projects. Facilities managers must keep pace with these changes, as well as maintain a store's image with regular, scheduled improvements and preventive maintenance on a daily basis.

Assessing facility conditions is an important part of this process. This task includes inspecting, collecting, analyzing and reporting on the condition of the entire facility or each building system, such as the foundation, roof construction, exterior enclosure, elevators and lifts, plumbing, HVAC – to name a few. Such assessments are not only critical for identifying and preventing serious issues, but the data is also valuable for budgeting and capital planning.

Oracle's Primavera Unifier for IWMS provides full lifecycle management from site selection, building, redesign to maintenance. It's a single integrated platform for organizing and managing the entire retail portfolio in a logical configurable hierarchy that reflects the structure of the organization by business unit, type of store, location or any other dimension.

The solution provides seamless integration with construction and renovation projects performed on the retail building or stores. It also provides flexible, configurable business process automation capabilities.

The Primavera Unifier Project Controls solution components, when combined with Facilities and Real Estate Management components provide a valuable tool for new store build, expansions, maintenance and renovation. It enhances real estate portfolio and project visibility, as well as control across a portfolio of stores. After the project and construction phases are completed, facilities executives can then manage the building's maintenance activities on the same system. The solution also ensures regulatory compliance, and increased collaboration with vendors, contractors and suppliers.

The Facilities Condition Assessment (FCA) feature within Primavera Facilities Management provides all the tools and processes required to perform this important task, including FCA inspections, assessing deferred maintenance work and estimated deficiencies, current replacement value and capital renewal costs, support for Uniformat II cost modeling, a configurable FCA Manager sheet, and automatic calculation of each building system's facility condition index (FCI), as well as the entire building's FCI. This ability to calculate the FCIs for each facility gives management professionals a way to objectively compare facility and/or building conditions. As a result, decision-makers gain visibility into building-renewal funding needs and comparisons.

Healthcare

Some 73% of healthcare construction is currently for modernization of facilities, to update IT infrastructure for greater clinical integration, and to make them greener and more patient-friendly, according to Health Facilities Management and American Society for Healthcare Engineering.[2]

On a daily basis, healthcare facility and real estate executives are also challenged with regulatory compliance and facility inspections, as well as controlling the cost of maintaining and operating their healthcare facilities.

Similar to the retail industry, assessing facility conditions is critical to all healthcare facilities. Assessments of a building's foundation, roof, elevators and HVAC are critical to patient care.

Primavera Unifier for IWMS offers full lifecycle management from site selection, building, redesign and maintenance of facilities, as well as fixed and moveable asset maintenance.

Regulatory compliance is also high on the list of workplace concerns in healthcare management. Heath facilities follow very strict rules for inspection of medical equipment and instruments, as well as other assets within the facilities. In these cases, Primavera Unifier for IWMS can help facilities executives keep track of all compliance requirements and ensure that they meet all critical dates for performing preventative maintenance, such as testing cooling system in operating rooms, for example.

A Canadian-based healthcare system uses three IWMS configurable functions for its facilities. Primavera Unifier Project Controls and Management solution helps the healthcare organization manage all of its hospital capital improvement projects, such as adding a wing in a hospital or renovating patient rooms. The facilities and maintenance management solution allows the healthcare system to track each of its assets, from MRI machines to ambulance fleet to lawn mowers, and monitor their maintenance needs – whether it's a routine tune-up or an emergency repair.

The real estate management solution provides them with an integrated lease administration solution, including automated lease payments. It also can be used to facilitate some of their real estate transaction management needs, such as new site acquisition and disposition.

Financial and insurance

Financial and insurance companies can own or lease hundreds of locations ranging from general office space, to call and claim centers, data centers and retail locations. In that respect, they share similar needs and business challenges with other vertical industries when it comes to real estate and facilities management.

But the financial services sector also has unique needs that IWMS solutions can solve. For instance, one of America's largest banks recently planned to replace and upgrade more than 2,000 drive-through ATM machines nationwide. The financial institution needed a solution to help them manage these projects at every bank branch across the country. It chose a Primavera Unifier for IWMS solution that included project and program management and a capital projects solution to orchestrate the upgrade.

Today, the financial institution uses the Primavera Unifier asset maintenance and preventative maintenance solution to centrally manage all 2,000 ATM machines and ensure that they continue to function properly.

Higher education

Higher education must manage a diverse portfolio of educational, housing, dining and sports facilities each with unique needs and changing demands. A large public, land-grant university with 29,000 students was looking for a complete IWMS solution to handle all of those requirements. They chose Unifier because of its single platform and integrated system that can manage capital projects and expansion along with facilities maintenance and management – and even lease management of its subleased restaurant spaces in the Student Union food court.

On capital projects side, the University of Utah deployed Primavera Unifier to help manage its $96 million Cancer Center expansion project. The solution helped the university complete the project $9 million under budget and two months ahead of schedule. Today, the campus continues to grow rapidly and has approximately 300 capital projects in progress, totaling more than US$900 million. Primavera Unifier enables the university to more tightly control campus construction budgets, as well as provide seamless access to information about capital projects.

The university has reduced project closeout time from up to three years, to an average of three to six months, and provided university administrators with an expanded view of projects underway.

The university also integrated Primavera Capital Planning, Primavera Project Delivery Management, and Primavera Cost Controls with the university's PeopleSoft Financials environment to automate payment processes and ensure consistent information between systems.

Future projects will continue to benefit from improved collaboration and visibility with the university's external partners—including more than 90 consultants and contractors— by giving them access to the system for day-to-day project management. Unifier has created a flexible project management environment that the university will continue to use to track key performance indicators, facilitate state reporting and expand portfolio planning capabilities.

The Solution: Flexibility & Configurability

Primavera Unifier has the flexibility and configurability to adapt to any vertical industry's needs and challenges. Organizations can leverage the built-in design and configuration tool kit to define or modify business processes to satisfy their own business rules and adapts to the way they do business. Unlike most other IWMS solutions, which tend to be more rigid and have fixed structures and business processes, Unifier is a highly flexible solution. Business processes can be configured into the design, including workflow, forms, fields, metadata, logic and other rules and requirements.

A comprehensive IWMS solution like Primavera Unifier provides customers with the ability to organize their portfolio of facilities, properties and projects, according to their specific hierarchy needs. Dashboards and map views can be configured at each level of Primavera Unifier's hierarchy, whether by project, program, facility or region, to provide a robust display of highly aggregated information across multiple tiers of information. These graphical elements provide a comprehensive view across facilities and the ability to slice information and drill down to identify the source of an issue to identify the root cause.

Facilities and Space Management

Unifier's space management solution allows organizations to maintain a centralized repository of physical spaces, and information about those spaces, delivering robust functionality that allows customers to optimize space utilization across the portfolio.

Unifier allows companies to:

» Manage and track space counts by type, usage and occupants.
» Consistently collect, analyze and report on facilities.
» Benefit from support for Building Owners and Managers Association standards.
» View interactive floor plans to manage space.
» Track and report on employee head counts, space standard compliance, room availability and more.

Real Estate Portfolio Management

Primavera Unifier for IWMS provides strategic planning functions as a repository of a corporation's real estate portfolio and assets. Unifier gives companies the ability to:

» Gain visibility into all real estate information across an entire portfolio.

» Track strategic transactions such as site/property acquisitions, dispositions and lease renewals.

» Manage market transactions such as acquisitions, construction, dispositions and financing.

» Configure commission tracking processes and reporting.

» Manage portfolio locations by region, property, site or any other structure.

Project Delivery and Management

Primavera Unifier provides customers with the ability to comprehensively manage all types of projects, from large capital projects to small maintenance and renovation type projects. Unifier gives companies the ability to:

» Automate all collaborative processes.

» Configure to match unique business workflow needs.

» Enforce business rules for compliance and routing of documents.

» Gain immediate visibility into problem areas.

» Fulfill auditing and reporting requirements.

» Utilize granular permissions control and detailed audit log.

Sustainability

Unifier's configurable capabilities allow organization to set up the processes they need to record, track and manage multiple dimensions of sustainability. Unifier enables companies to:

» Customize energy reports and provide dashboard capabilities based on each customer's needs and compliance requirements.

» Determine LEED readiness through the Environment Manager navigation mode that can be set up with appropriate business processes to track the environmental impact of facilities.

» Calculate ROI of sustainability initiatives.

Summary

A comprehensive IWMS solution has many benefits, including greater financial discipline, operational excellence and risk management. Integrated cost and budget governance means that companies now have transparency and control of all real estate and facilities costs. Cost overruns are minimized, and financial planning is made easier. Preventative maintenance and inspections are now automated, minimizing system failures and reported incidents, and baselines have now been established for code compliance.

A flexible, configurable IWMS solution that meets the specialized needs of vertical industries provides a competitive edge.

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Hardware and Software, Engineered to Work Together

White Paper Title
January 2015

Oracle is committed to developing practices and products that help protect the environment