

# Windows Client/Server: Overview



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 Macintosh — Apple Computer, Inc.  
 PC-NFS, J2EE, Java, JavaScript, Java2 Enterprise Edition— Sun Microsystems, Inc.  
 Watcom, Watcom SQL, Watcom SQL Server, Sybase, SQL Anywhere, Adaptive Server Anywhere —Sybase, Inc.  
 Novell, NetWare — Novell, Inc.  
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 Pentium — Intel Corporation.  
 BasicScript — Summit Software Company.  
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 Crystal Reports — Seagate Software Information Management Group, Inc.  
 Netscape Navigator — Netscape Communications Corporation.  
 WebSite — O'Reilly & Associates  
 ColdFusion, ColdFusion MX, ColdFusion Studio, HomeSite+ — Allaire, Corp.  
 Tomcat — The Apache Software Foundation  
 WebLogic — BEA Systems, Inc.  
 Actuate, First Impression — Actuate Corporation  
 Linux — Free Software Foundation, Inc.  
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## About This Guide

This guide is designed as a training tool for **ARCHIBUS V.18.2**. The guide may or may not be compatible with earlier or later versions of ARCHIBUS.

The following represents the estimated time a user will spend reading the document and completing the included exercises.

<b>Training Topics:</b>	<b>Minutes:</b>
Overview .....	:30
Exercise 0021: Explore Real Estate Portfolio Management .....	:05
Exercise 0022: Explore Space Planning and Management .....	:05
Exercise 0023: Explore Asset Management .....	:05
Exercise 0024: Explore Building Operations .....	:05
Exercise 0025: Explore Capital Project Management .....	:05
Exercise 0026: Explore Strategic Master Planning .....	:05
Review .....	:10
Estimated Time to Complete .....	<u>1:10</u>



## What is ARCHIBUS?

Facilities and physical infrastructure management is a critical business function. Comprising 25 to 50 percent of a company's fixed assets and operating costs, facilities are significant resources that must be efficiently managed in order for a business to succeed in a globally competitive market.

Facilities information crosses an organization's traditional department boundaries. For example:

- A CFO evaluating mergers requires accurate real estate portfolio information.
- A CEO generates business plan projections that drive a planner's space forecasts.
- A space planner allocating resources must integrate data from all departments and communicate the result to architects.
- A move planner must coordinate data from the facilities, telecommunications, and maintenance departments.

Facilities information also crosses the boundaries of traditional software applications:

- CAD drawings depict a facility's structure and areas.
- Databases store alphanumeric data about rooms, equipment, furniture, repairs, and breakdowns.
- Spreadsheets calculate areas, rent, and maintenance costs.
- Routed approvals flow through email.
- Web browsers pull casual and remote users directly into the workflow.

As such, to implement facilities management automation, you need a specialized package that understands the corporate roles and responsibilities, understands the business missions and what each role requires to achieve them, knows how to validate and flow facility information through an organization, and can integrate diverse technologies into a unified whole. ARCHIBUS is such a system.

The ARCHIBUS application activities provide directed, best-practice methods for handling the complete range of facilities and infrastructure functions. These applications run within a unique environment that fuses database, CAD, spreadsheet, Web, document management, and workflow features into a cohesive whole. The entire application suite is wholly integrated, driven from a data dictionary, and can be completely configured to reflect your own business processes and to embed ARCHIBUS within your corporate development environments.

Corporations are global, and their software must likewise be able to provide far-reaching services. Towards that end, ARCHIBUS is built on enterprise-scalable technologies: client/server database technology to serve large databases and many users; blue-chip CAD technology to reliably store and retrieve sizeable CAD drawings; workflow and Web services to interoperate with the rest of your ERP suite; and Web-ready interfaces for instantaneous global access to all aspects of a facility's data.

Notes

## Components of ARCHIBUS

ARCHIBUS automates facilities management by providing applications for managing all types of facilities issues, in all types and sizes of facilities, in both the Web and Windows environments. ARCHIBUS is a modular system: application activities focusing on specific aspects of facilities management run on top of a core Windows or Web program using a client/server database system.

### ARCHIBUS Web Central

Many organizations want to broadly share—both internally and externally—their organizational data by making it available through the Internet or a corporate Intranet. ARCHIBUS Web Central provides live enterprise access to organizational data and enables you to easily maintain and distribute facilities information across your entire enterprise. With Web Central, everyone in your company—from the occasional user reporting a maintenance issue, to the department manager checking chargeback amounts, to the space planner allocating space—can access and update organizational data using the familiar interface of a Web browser. These users access and edit the database without learning the operation of the ARCHIBUS Windows product.

Web Central uses the same role-based security as ARCHIBUS so that when users log on, they access only the tasks and information relevant to their specific role within the organization. For example, craftspersons see only the tasks and data for maintenance work at their site; department managers can edit only the rooms assigned to their departments and can examine space chargeback only for their departments.

### ARCHIBUS Windows/Client Server

The ARCHIBUS for Windows application control program runs under Windows and provides an interface in which you can simultaneously work with databases, business graphics, and reports with embedded floor plan drawings. You connect your database records to items in CAD drawings to form asset symbols, so that data, such as a room, is represented both graphically in a floor plan drawing and alphanumerically in the database. For the graphical components of your facilities data, ARCHIBUS offers both a DWG Viewer and a DWG Editor for directly accessing drawings in DWG format, enabling you to view and edit CAD drawings from ARCHIBUS. The program's analysis tools integrate alphanumeric data, drawings, and business charts to produce all types of reports, complete with proportional fonts and labels.

### ARCHIBUS Overlay for AutoCAD and Revit or ARCHIBUS DWG Editor

Rather than use the DWG Editor available from ARCHIBUS for Windows as their drawing environment, some users prefer to run the full AutoCAD program. For these users, ARCHIBUS offers the ARCHIBUS Overlay for AutoCAD. Invisibly residing on top of AutoCAD, the Overlay runs as a client to ARCHIBUS facilities database and interprets AutoCAD commands run on facilities drawings. It also provides its own tools and commands specifically designed for automating facilities management.

### Application Activities

Application activities focus on a particular facet of facilities management, such as preventive maintenance, room inventory, personnel inventory, equipment inventory, move management, capital budgets, and emergency preparedness.

An activity divides its major issues into a series of goals, and providing tasks for accomplishing these goals. An activity includes tables for recording data in a database, a set of reports and graphic analyses, routines that run calculations and manipulate data, and specialized dialogs to help you work through the tasks.

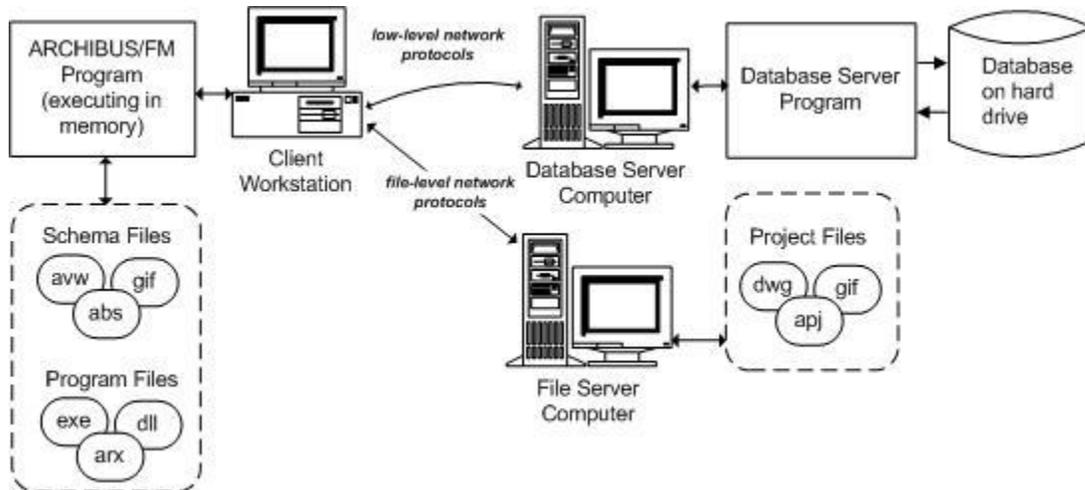
Activities can run in both the Windows and Web environments, or exclusively in one of these environments. The activities are closely connected in that they access the same database. Data you develop with one activity can be accessed and reused with another.

## WAN-Style Configuration

The typical configuration, the WAN-style configuration, calls for loading the ARCHIBUS Windows program on each client workstation. This option uses some hard-disk space on the client workstation, but loads ARCHIBUS quickly.

While you can use this configuration on any network, it is termed the **WAN-style configuration** because it is most popular on wide-area networks, which often are slower than local-area networks.

In the WAN-style configuration, project files such as the drawing files are kept on a common file server so that they can be accessed by multiple people.



## System Requirements for ARCHIBUS Windows

### Minimum:

- Pentium III (or higher) compatible PC, 800 Mhz or faster
- 512 MB RAM or more
- 1024x768 SVGA display or better
- 150 MB free hard disk space (500 MB during installation)
- Windows 2000 Service Pack 2, Windows XP Professional, Windows 2003 Server, Windows Vista Business, or Windows Vista Business Service Pack 1
  - ARCHIBUS for Windows will run on 32-bit or 64-bit versions of the operating system.
  - ARCHIBUS for Windows requires 32-bit versions of the client database drivers.
  - The ARCHIBUS Overlay requires a 32-bit version of AutoCAD or Revit.
- Microsoft Internet Explorer 6.02 or 7.0
- Microsoft .NET Framework 2.0 (for Crystal Reports 10 support)
- Users of the ARCHIBUS Overlay for Revit need Revit Architecture 2008 or 2009.
- Users of the ARCHIBUS Overlay for AutoCAD need one of the following programs:
  - AutoCAD 2004, 2005, 2006, 2007, 2008, 2009, or 2010
  - AutoCAD Architectural Desktop 4, 5, 2006, or 2007
  - AutoCAD Architecture 2008, 2009, or 2010

# Organization of ARCHIBUS

The ARCHIBUS system consists of a series of professional domains and activities that focus on specific areas of facilities management.

## Domains

The domains are areas of practice organized by the building lifecycle: Real Property and Lease Management, Capital Planning, Strategic Master Planning, Space Management, and so on. Each domain consists of a series of activities.

## Activities

Each activity within ARCHIBUS represents a discrete business function or automation goal with a defined outcome or business benefit. For instance, you may wish to implement the Space Chargeback activity to improve accountability for space usage. Or you may wish to implement the Horizontal Cabling activity to speed moves, adds and changes and to maintain your investment in your cable plant.

## Processes or Roles

Each activity, in turn, consists of a series of processes or roles that correspond to deployment responsibilities. For instance, the Move Management activity divides tasks appropriate for Move Requestors, Move Coordinators, Data Coordinators, and Craftspersons into separate, dynamic menus. When a user logs in, they see only the tasks appropriate for their role. This approach simplifies the software, increases data security, and reduces training. Similarly, processes for CAD specialists are separated from processes for facility information managers. Web processes for remote managers are separated from data development processes. The result is that the activities remain integrated, but are still accessible from within Windows, within your CAD program, or on the Web.

## Tasks

The task is the actual selection that a user makes to perform an action, such as editing a floor plan drawing, examining a report, editing a database record, and so forth. For example, a user might select the "Create Work Request" task and complete the resulting form with a description of required maintenance work.



Domains / Modules

Activities

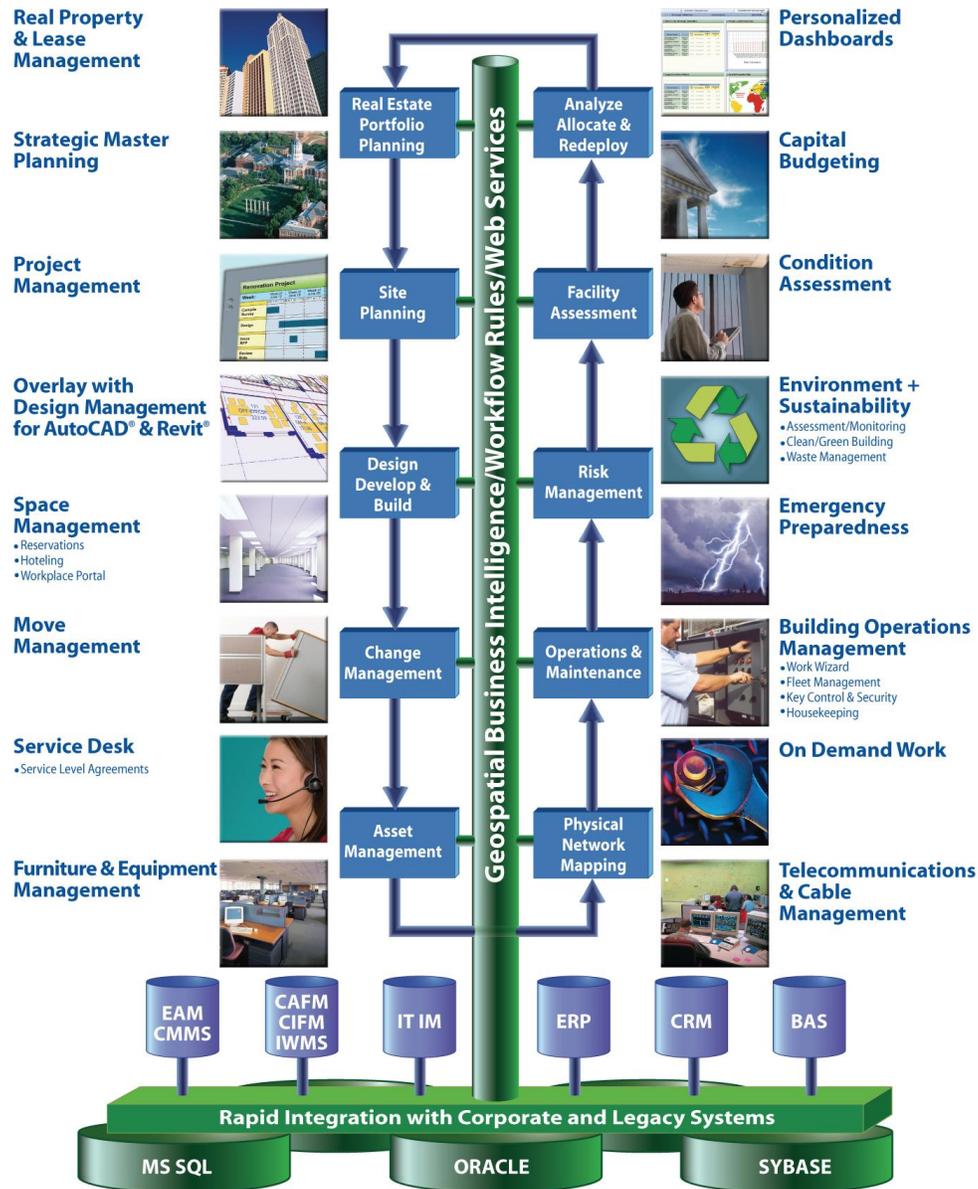
Tasks



Notes

# ARCHIBUS Domains/Modules

There are a variety of ARCHIBUS domains and activities designed to help organizations track all the information related to their facilities. When looked at as a group, the domains and activities represent various stages in the development of facilities from assessments, to building projects, to maintenance, and more. It is good to have a broader knowledge of how these modules and activities are related to one another to fully take advantage of the ARCHIBUS system.



Notes

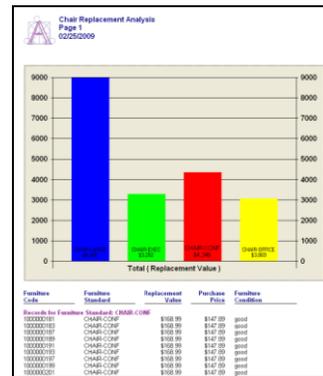
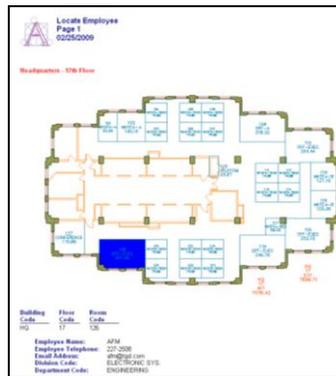
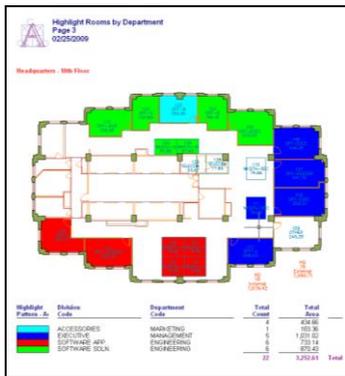
# Overview: ARCHIBUS for Windows

ARCHIBUS is a full-featured Windows application for facilities management. It is a complete application that performs facilities tasks; it is not simply a drawing or database tool. ARCHIBUS provides intelligent integration of all types of data: drawings, database tables, spreadsheet calculations, business charts, bar code fonts, and graphics.

## In This Document

The goal of this document is to give users the basic skills needed to navigate the ARCHIBUS Windows product and to get a full appreciation of its functionality. Here some examples of how the information can be shared:

## Graphical Reports



## Summary Analyses

**PROPERTY COST HISTORY**  
From Year: 2004 To Year: 2009 From: Costs, Scheduled Costs, Recurring Costs  
Page 1  
02/25/2009

Conf. Category	Income - Expenses 2004	Income - Expenses 2005	Income - Expenses 2006	Income - Expenses 2007	Income - Expenses 2008	Income - Expenses 2009
<b>Records for Property Code: 1 HARRISON PARK</b>						
GENL. TELEPHONE	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BUILDING - ELECTRIC	\$0.00	\$6,850.00	-\$5,463.00	-\$5,572.26	-\$5,863.70	-\$2,533.85
CLEANING - CONTRAC	\$0.00	\$0.00	-\$3,000.00	-\$2,000.00	\$0.00	\$0.00
DISPOSITION - EQUIP	\$0.00	\$5,000.00	\$5,000.00	\$6,550.00	\$6,550.00	\$7,320.00
FEE - ACCOUNTING	\$0.00	\$0.00	\$0.00	-\$1,050.00	\$0.00	\$0.00
INTEREST - CONTRAC	\$0.00	\$0.00	\$0.00	\$186,000.00	-\$59,812.90	\$0.00
INTEREST - FINANCIAL	\$12,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PROJECT - CONTRAC	\$0.00	\$13,000.00	\$0.00	\$0.00	\$0.00	\$0.00
PROF. - SALARY	\$0.00	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00
TAX - TAX	\$0.00	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00
UTILITY - ELECTRIC	\$0.00	-\$660.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$6,700.00	\$22,306.66	\$2,363.00	\$31,372.26	\$58,398.60	\$4,786.65
<b>Records for Property Code: BOULEVARD PARK</b>						
GENL. PATROL	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BUILDING - MAINTENANCE	\$1,000.00	\$12,100.00	-\$13,310.00	-\$14,841.00	-\$16,195.10	-\$16,260.96
BUILDING - OUTSIDE CL	\$2,000.00	-\$10,600.00	-\$12,600.00	-\$14,876.00	-\$17,971.20	-\$17,076.41
FEE - COMMISSION/EXP	-\$6,800.00	-\$6,800.00	-\$6,800.00	-\$6,800.00	-\$6,367.10	\$0.00
INSURANCE - FLOOD/E	\$0.00	-\$700.00	\$0.00	-\$1,950.00	-\$4,200.00	-\$3,917.74
INTEREST - CONTRAC	\$1,235.23	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PARKING - TRAVEL	\$600.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
SECURITY - CONTRAC	\$0.00	\$0.00	-\$9,600.00	-\$8,979.71	\$0.00	\$0.00
TAX - OTHER TAX	\$0.00	\$250,153.80	\$0.00	\$0.00	\$0.00	\$0.00
	\$19,214.77	\$79,953.80	-\$41,390.00	-\$49,645.71	-\$44,663.40	-\$37,245.11

**Summary for view Unsuitable Condition Assessment Items Budget by Priority**  
Date Created: 02/25/2009  
Time Created: 11:04:39am

Building Code	Building Name	Conditions Priority	Count	Cost - Estimated Total
HQ	Headquarters	Mission Support	1	350.00
HQ	Headquarters	Code Compliance	5	940.00
HQ	Headquarters	Life Safety	2	540.00
<b>Total</b>			<b>8</b>	<b>1,830.00</b>

## Comprehensive Data Views

**Condition Assessment Scoreboard**  
EMV-BUST-ASSESS-TEST-ANNUAL

Project(s)	Estimated Budget (\$)	Unsatisfactory	Poor	Fair	Good	Very Good	Not Entered
Life Safety	250	0	0	0	0	0	0
Code Compliance	2400	0	0	0	0	0	0
Facility Loss	0	0	0	0	0	0	0
Environ. Code	0	0	0	0	0	0	0
Mission Support	0	0	0	0	0	0	0
Delayed Priority	800	1	0	0	0	0	0
Cost Effective	14000	0	0	2	0	0	0
Def. Renovation	0	0	0	0	0	0	0
Company Image	600	2	0	0	0	0	0
Maintain	0	0	0	0	0	0	0
Not Entered	0	0	0	0	0	0	0

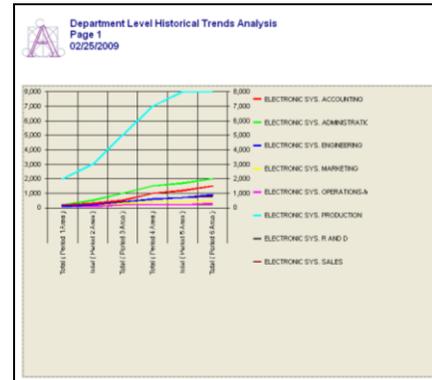
(Wednesday, February 25, 2009 11:12:44 AM)

**Equipment Standards**  
Page 1  
02/25/2009

Records for Equipment Standard: A-HP-LASERJETZ

Equip. Std. Graphic: A-HP-LASERJETZ  
Equip. Std. Block Graphic:

Equipment Description: HP Laser Jet 8 Printer  
Equipment Category: Printer  
Manufacturer: Hewlett Packard  
Model Number: HPLJ8  
Standard Price: 1,000.00  
Average: 0.00  
Value: 0.00  
Equipment BTB: 0.00  
Standard Area: 0.00  
Standard Width: 0.00  
Standard Depth: 0.00  
Standard Height: 0.00  
Phase: 1  
Size: Capacity: 0.00  
Equip. Std. Graphic: HP2\_JPS  
Revolving Blank: PRN-STD

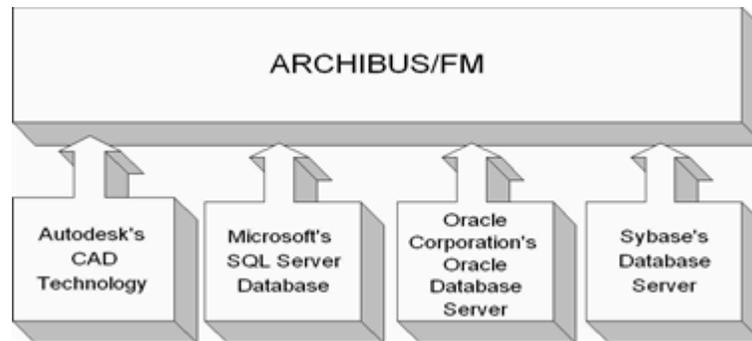


Notes

## Windows Feature Summary

### Embedded Blue-Chip Technology

ARCHIBUS integrates the power of blue-chip, industry-standard software into one cohesive program for managing the many aspects of your facilities data. ARCHIBUS's DWG Editor and DWG Viewer are powered with Autodesk's AutoCAD technology and provide direct access to AutoCAD .DWG files. ARCHIBUS also works with products from the most widely-accepted client/server database vendors: Microsoft, Oracle, and Sybase. ARCHIBUS transparently integrates these programs into a single interface, so that users do not need to be concerned with the operation of the underlying programs.



### Task-Oriented Navigators

The first step in designing effective facilities management is to simplify the business of facilities management so that facilities managers and others can develop and maintain the data they require. The ARCHIBUS Process Navigator fulfills this need by presenting methodologies and tasks in a linear manner, thereby providing structure and organization to your facilities management objectives.

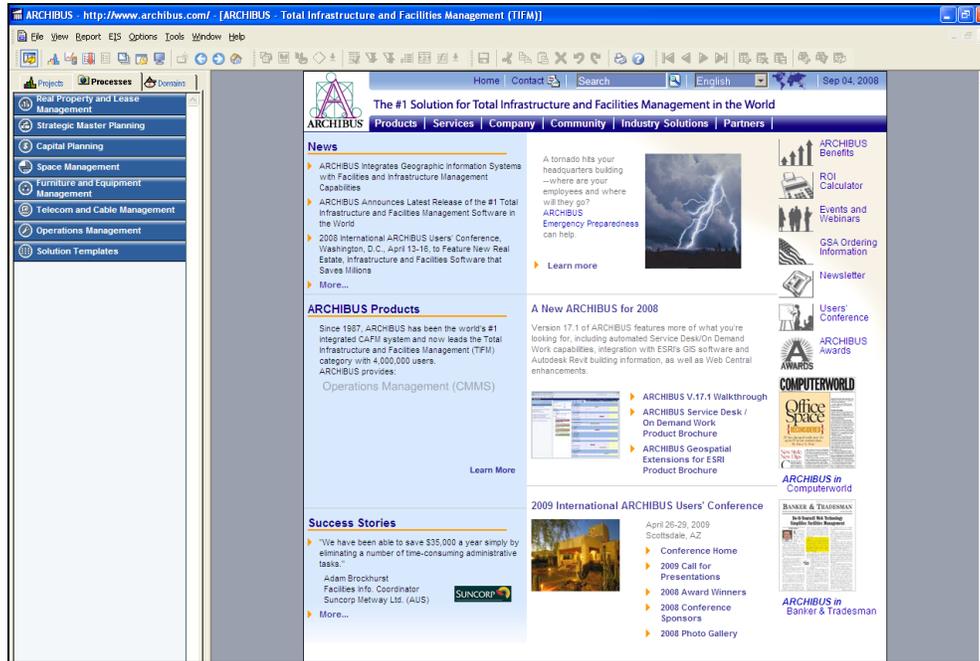
The ARCHIBUS Process Navigator shows you the reports you can produce and outlines all the steps required for generating these reports. By using the Process Navigator to work through the activities, you can focus your data development on specific reports and reduce the time required for implementing CAFM. Process Navigators may be organized by role, as per the below image, or by process.



The Process Navigator takes advantage of the program's role-based security, enabling system administrators to provide each user with just the tasks and data that they require for their job. With this streamlined interface, users are not distracted with irrelevant buttons or data and are better able to efficiently work.

## Embedded Browser Window

With ARCHIBUS's embedded browser window, you can specify a page to display upon startup of ARCHIBUS. This page can be any HTML file, such as the ARCHIBUS Learning Path, the Web page of your ARCHIBUS business partner, or even a customized HTML form.



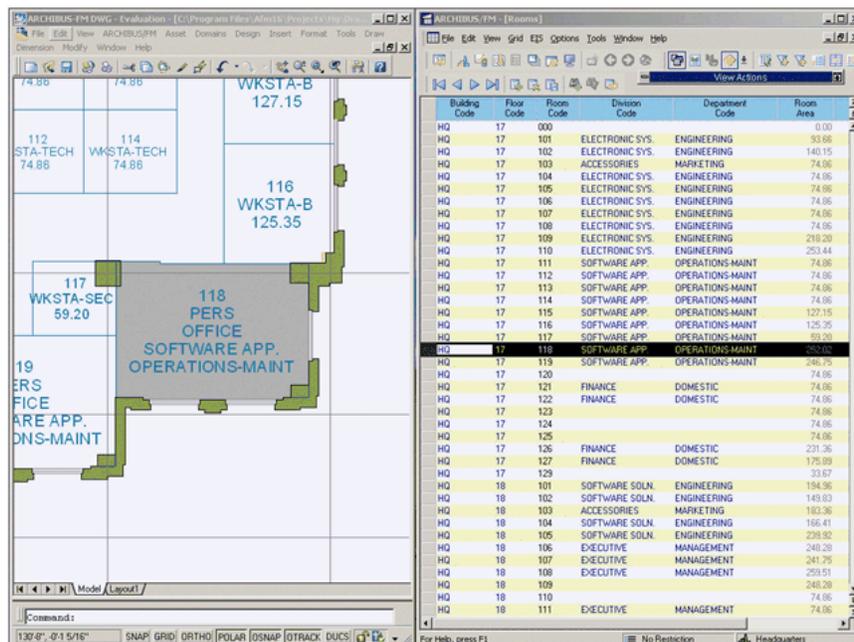
Access to a Web page from ARCHIBUS can be handy for quickly linking to other systems. For example, your site could develop a bulletin board page for distributing facilities information, such as upcoming deadlines or changes in standards, to ARCHIBUS users. Or, your site could develop a Web page with links to frequently needed information, such as Human Resources data or security badge information. With the embedded browser Window, you can automatically see this information each time you start ARCHIBUS, as well as directly access it from ARCHIBUS.

## Database Performance

ARCHIBUS's use of a client/server database system eliminates network traffic bottlenecks and improves speed. ARCHIBUS also provides generalized SQL queries and updates that efficiently present your data.

## Linked Drawings and Tables

In order to obtain a high level of CAD-database integration, ARCHIBUS links database tables to a series of drawings containing related items. Thus, if you request the program to display a database table, it can display the drawings containing items linked to this table as well; when you issue a report, the program automatically accesses the appropriate drawings and embeds them in the report. Once you activate linked drawings and tables, you can see the connections between records and intelligent drawing entities (known as asset symbols). For example, select an asset symbol and the program highlights the linked record; selecting a linked record highlights the corresponding asset symbol.



## Round-Tripping between AutoCAD

Many analysis packages let you import AutoCAD data, but with ARCHIBUS you can store facilities data directly in your AutoCAD drawings. For example, you can bring a structural drawing developed in AutoCAD into ARCHIBUS to add facilities information. You can then load the drawing in AutoCAD where your ARCHIBUS facilities information will be available for viewing.

## Positional Recognition

When you move an item in a regular CAD floor plan, the floor plan cannot understand the implications of this move. When you move an item in ARCHIBUS, the program knows which assets have associated data—such as room assignments—and automatically changes the assignment in the database.

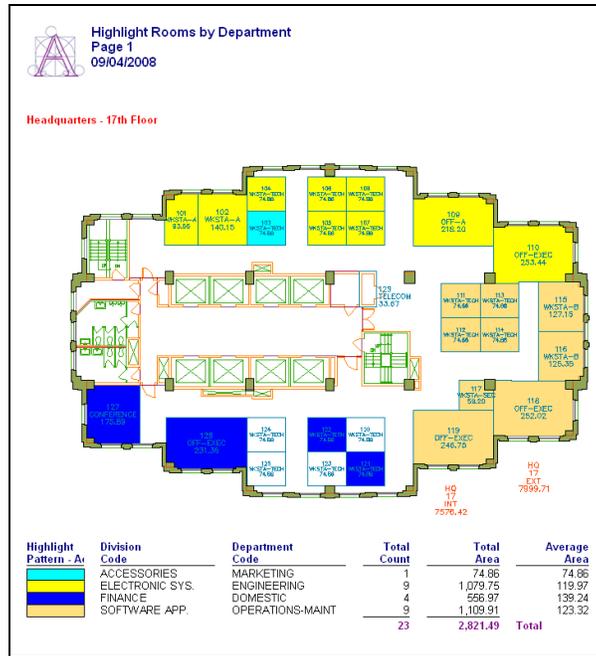
## Database-Driven Drawings

ARCHIBUS can drive your drawings from inventory data, including bar code survey data. Thus, you can easily create furniture and equipment plans from a bar code survey. The process also supports starting an integrated CAD and database inventory from an existing list of furniture assets.

## Integrated Text and Graphics Reporting

Facilities managers require powerful reports that can be distributed throughout their organizations; drawing plots or spreadsheets alone typically do not suffice. ARCHIBUS meets this need by using Report mode to integrate alphanumeric data and facilities drawings, along with other graphics, in ready-to-print professional reports, complete with your choice of proportional fonts and bar codes.

With a single query you can produce a list of all vacant technical stations and a series of drawings showing where these workstations are located. Show location plans on your work orders, new furniture arrangements on your move lists, stack diagrams on your lease vacancy reports, wiring plans on your telecommunication reports—all without manually formatting the page, manipulating frames, or inserting pictures.



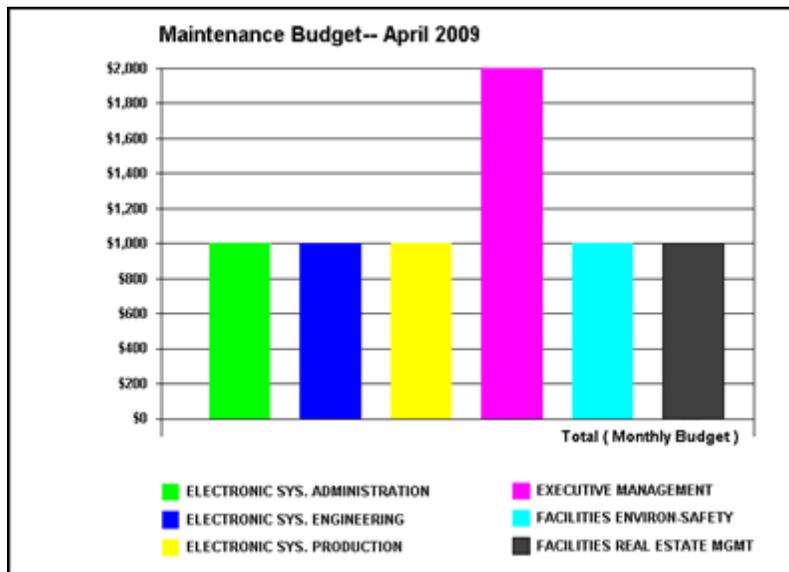
## Bar Coding

Bar codes have several important uses in facilities management, including tagging furniture and equipment assets, identifying work orders, and identifying employees. ARCHIBUS includes a type of field that can accept bar code values and display in a bar code font when included in reports. ARCHIBUS ships with an industry-standard bar code font and also supports other bar code fonts your site may already be using.

Equipment Code	Equipment Standard	Equipment Use	Building Code	Floor Code	Room Code	Cost to Replace
1001	A-PC	Personal Computer	XC	04	105	\$0.00
1002	A-PC	Personal Computer	XC	04	104	\$0.00
1003	SUN	Departmental Server	XC	04	103	\$0.00
1004	SUN	Departmental Server	XC	04	102	\$0.00
1005	A-PC	Personal Computer	XC	04	101	\$0.00

## Business Charts

In one image, a business chart summarizes all of the data in a report. With ARCHIBUS’s chart features, reports can include all types of business charts—including pie charts, bar charts, and Gantt charts—in 2-D or 3-D format. Space allocation reports can present not only lists of departments and space assignments, but also charts showing inefficient space usage or the proportions of space occupied by each organizational unit. If a report does not automatically generate a chart, you can instruct it to include one and then configure its format.



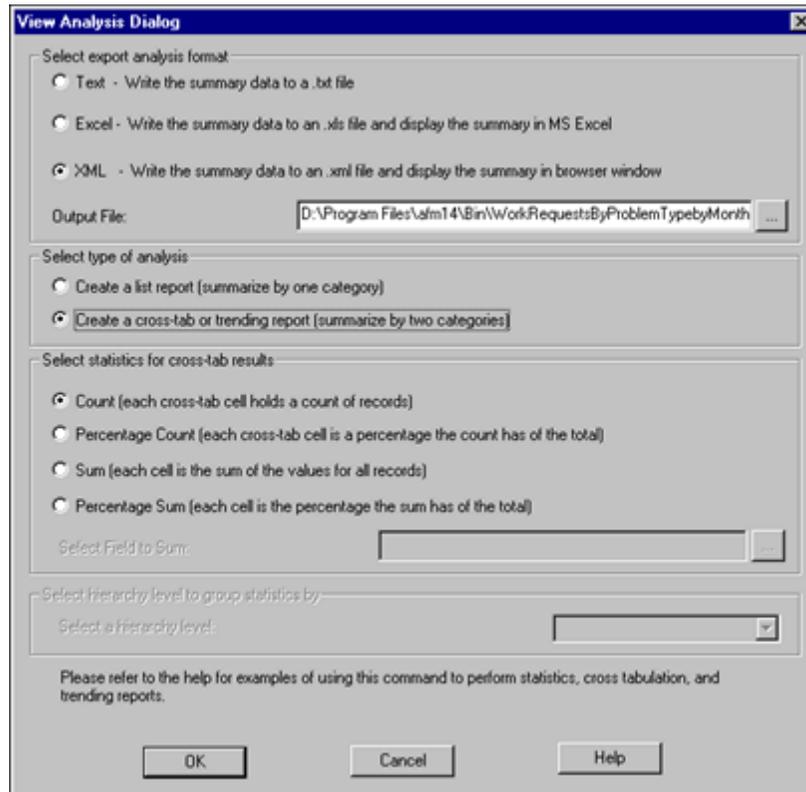
## Pick-and-Place Reporting

In addition to its integrated, flexible report generator, ARCHIBUS provides fixed-format reporting for complex reports that require a free-form, pick-and-place report definition. These reports are labeled with the phrase “(Fixed Format),” such as the “Lease Abstract (Fixed Format)” report. Select a fixed-format report, and ARCHIBUS displays it in a preview window allowing for pagination and variable zoom. From this window, you can export the report to various formats, including ASCII text, Microsoft Excel, Microsoft Mail, and HTML. Users with a copy of Seagate’s Crystal Reports™ program can create their own fixed-format reports and access these reports directly from ARCHIBUS.

Lease Abstract Report	
Page 1	
09/04/2008	
Records for Lease Code: 001	
<b>Landlord Name:</b> The Stapleton Company <b>Landlord Contact:</b> MR. GLEN STAPLETON	<b>Area - Meas. Usable:</b> 2,601.7 <b>Area - Meas. Common:</b> 738.7 <b>Area - Meas. Rentable:</b> 3,340.4 <b>Area - Neg. Rentable:</b> 3,500.0
<b>Tenant Name:</b> Harrison Corporation <b>Tenant Contact:</b> MR. BRIAN SCHWARTZ	<b>Amount - Security Dep.:</b> \$0.00 <b>Date Costs Calculated:</b> 05/01/2005 <b>Date Costs Start:</b> 07/01/2004 <b>Date Costs End:</b> 06/30/2005
<b>Lease Type:</b> NET <b>Building Code:</b> HQ <b>Address 1:</b> 1802 Market Street <b>City Code:</b> PHILADELPHIA <b>State Code:</b> PA <b>Floor(s) Description:</b> 18th <b>Account Code:</b> PROPERTIES WW INC. - 001 <b>Landlord/ Tenant:</b> TENANT <b>Space Owned?:</b> No <b>Parent Lease:</b> <b>Lease Signed?:</b> Yes <b>Space Use:</b> N/A <b>Occupancy - Total Suite:</b> 32 <b>Occupancy - Lease:</b> 32 <b>Date Start:</b> 06/01/2004 <b>Date End:</b> 06/01/2014 <b>Date Move In:</b> 06/01/2004	<b>Amount - Base Rent:</b> \$9,000.00 <b>Amount - Pct. Rent:</b> \$0.00 <b>Amount - Operating:</b> \$4,400.00 <b>Amount - Taxes:</b> \$0.00 <b>Amount - Other Costs:</b> \$-15,800.00 <b>Net Income:</b> \$-29,200.00 <b>Avg. Monthly Base Rent:</b> \$-750.51 <b>Avg. Monthly Pct. Rent:</b> \$0.00 <b>Avg. Monthly Op. Costs:</b> \$-366.92 <b>Avg. Monthly Taxes:</b> \$0.00 <b>Avg. Monthly Other Costs:</b> \$-1,317.57 <b>Avg. Monthly Net Income:</b> \$-2,435.00 <b>Yly Net Inc/Meas Rent Area:</b> \$-3.74
== Notes ==	

## Summaries and Cross-Tab Reports

With the program's View Analysis features, you can use cross-tab analysis to create powerful statistical reports and then export these summaries to XML or Microsoft Excel format. You can summarize data by multiple criteria simultaneously to answer such questions as: what is the total cost of work orders by problem type by month? how many leases are expiring in each of the coming months? within each division, how many employees are there for each employee standard? within each building, what percentage of room area is assigned to each room category? Output this analysis to an XML report and you are ready to share this data with any Internet Explorer user.



## Industry-Specific Reports

Targeted features of ARCHIBUS address industry-specific issues. For example, the Space Management domain provides chargeback analyses that are based on BOMA guidelines or consider government regulations affecting the education and healthcare industries; the Real Property & Lease domain includes reports specifically designed for real estate brokers and corporate real estate managers.

## Unlimited-Tier Hierarchies

With the program's Unlimited-Tier Hierarchy feature, you can create flexible data hierarchies many levels deep to model complex relationships, such as deeply nested project management tasks, buildings with nested subsystems, and matrix-based organizational hierarchies. The hierarchies are presented through a tree-control interface, so that you can visualize and manipulate data while working within one window. For example, you can establish an unlimited-tier hierarchy to model and roll up data according to a deeply nested global organizational structure.



## Application Security and Command Access Levels

The ARCHIBUS program provides several options for controlling the data and program features that each user can access. These features are initiated by the program's log-on process. The log-on process establishes that only authorized users, who supply an appropriate password, are able to access the system. The log-on process also activates a user's security role—a setting that controls the data that a user can access. Each field in the database can be assigned a security group setting, so that only users of defined roles can see or edit particular fields. For example, if you do not have permission to access a sensitive field (such as salary), the field does not appear on your view.



## Application-Level Virtual Private ARCHIBUS (VPA)

In addition to application-level security for determining the database fields and program features that a user can access, system administrators can implement application-level Virtual Private ARCHIBUS features, which control the particular records that a user can access. With Virtual Private ARCHIBUS, a system administrator establishes access to database records based on each user's site, building, department, and/or role within the organization. This enables all data to be stored in one central repository, but to be accessed only by users who truly need it.

For example, an employee in the Marketing department has access to Room records assigned only to the Marketing department. A CAD specialist can access only drawings and data for their site or role. With VPA, you control data access on a "need to know" basis, resulting in a simpler interface for users, smooth information flow, and few errors.

## Customization from within ARCHIBUS

If the program's methods, views, or definition of database tables and fields do not quite suit your needs, you can easily change them—right from within ARCHIBUS. Editing programs and procedures is not required.

For example, you can change views and create new views by working with the program's commands and dialog boxes. From the Domain Navigator's System domain, you can modify entries on the Domain Navigator and Process Navigator, as well as edit the schema definition tables to change and create database tables and fields.



If you prefer not to edit a schema definition table, you can define a new database field by simply completing a dialog box. The Add Field dialog box prompts you for all the properties of the new field and then updates the schema definition to include this new field.

## Basic Language Extension

For more advanced customization, you can use the ARCHIBUS Basic language extension, an object-oriented version of Basic with specific objects for programming facilities management tasks. ARCHIBUS Basic provides complete control over the ARCHIBUS program and the Windows environment. For example, with the language extension, you can hide complicated transactions (such as work order close-out or move list processing) under a single, robust menu pick; you can use the Microsoft Mail API to query facilities data and send the result as e-mail; you can use DDE to talk to other Windows programs. The ARCHIBUS Basic language extension is covered in the ARCHIBUS Advanced Training Course, and its documentation is included in ARCHIBUS System Management Help.

## Basic Skills: Windows Client/Server

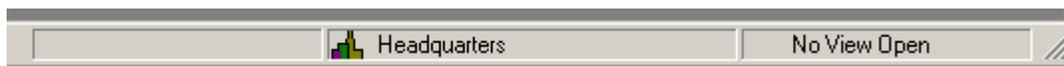
All of the functionality described in the previous pages comes standard with the ARCHIBUS Windows application. In this section, you will become familiar with how to navigate ARCHIBUS to find specific views of data or reports.

### Skill 1: Opening a Project

The first step after opening ARCHIBUS is to choose the project with which to work. A project holds the files you want to access when working with a particular database. A project can include:

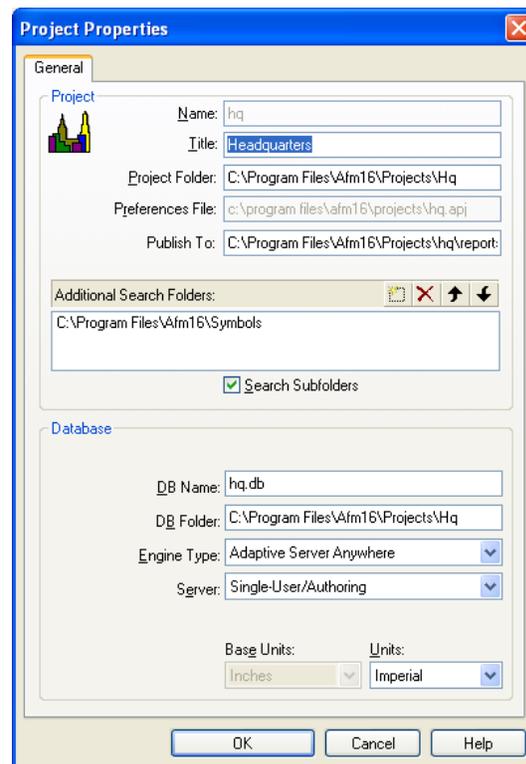
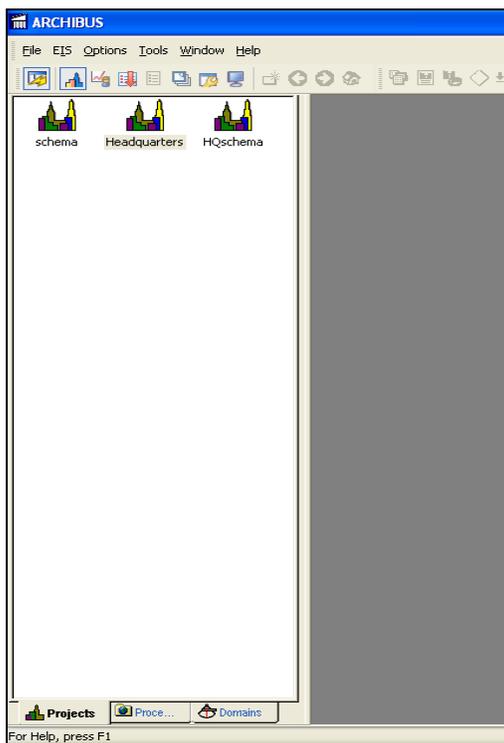
- the database holding your facilities data
- the supporting graphic files
- floor plan drawings
- block drawings that you want to access when working with this database and floor plan drawings

As soon as you select a project, ARCHIBUS starts the database server program and opens the project database. The right side of the ARCHIBUS status bar displays the name of the open project.



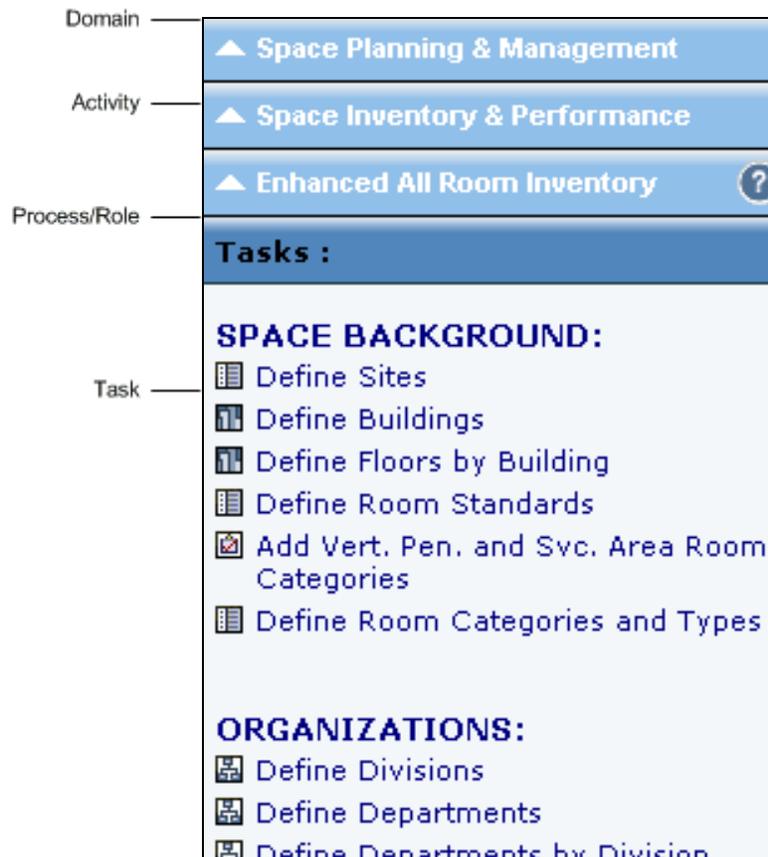
To open a project after starting the program:

1. Run the File/Project/Open command. (Or, choose a project icon from the Projects tab of the Explorer window on the left of your application window.)
2. The system presents a list of database projects. Choose a project from this list by double-clicking on the appropriate icon.



## Skill 2: Using the Process Navigator

To organize the project data, ARCHIBUS provides the Process Navigator which is organized into facilities management application areas (domains) such as space management, lease management, furniture and equipment management, building maintenance, and telecommunications management.



### Role-Based

The Process Navigator provides a structure for developing and presenting data in an organized, easy-to-follow manner, based on your role within the company. Typically a business process owner or ARCHIBUS program manager will configure the Process Navigator so that it presents tasks appropriate to your role. Your Process Navigator may look different than that of your co-workers, since you may have been assigned different processes. Using the Process Navigator to access and develop data helps you focus on just the tasks required for your job or role, providing an efficient environment for data development and management.

### Using the Process Navigator

To access a particular task, click on the activity, the process (or role), and then the task. If you have only one activity or process, the program will select it automatically for you. Clicking on a task loads the form or report you need; this is also known as a view into the data. To return to a previous level of the Process Navigator, click the up arrow icon next to the current process/role, activity, or domain.

### Skill 3: Using the Domain Navigator

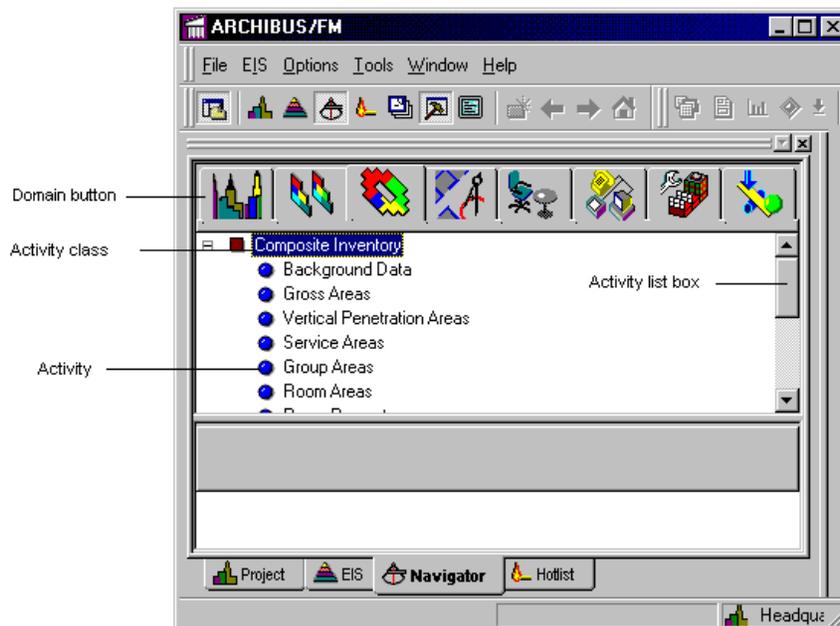
This topic describes the various components of the Domain Navigator and explores how to use the Domain Navigator's buttons and lists to show a domain's details.

#### Domains

Domain buttons at the top of the Domain Navigator represent the ARCHIBUS domains. Selecting a domain button activates the domain so that the Domain Navigator can present its activities and tasks. Use the right and left arrow buttons to scroll through the domain buttons if you cannot see any of them in the ARCHIBUS Explorer window. You can hide domain buttons you do not use by right-clicking on that area of the toolbar and unchecking the domain you want to hide.

#### Activity Classes and Activities

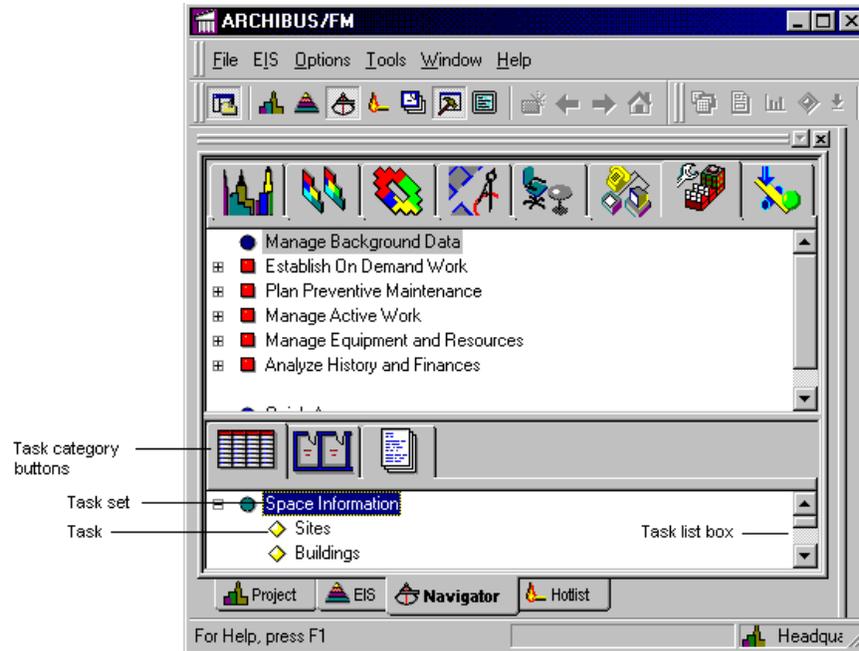
Selecting a domain button causes the Domain Navigator to list the domain's activity classes—the goals of the domain—in the activity list box (the upper list box). If a domain's activities are not organized into activity classes, selecting a domain button displays activities in the list box.



Double-click on an activity class or click the plus sign to the left of that entry, and the Domain Navigator expands the list to show the activities composing this activity class. To contract the list so that it hides the activities of an activity class, double-click on the activity class again, or click the minus sign. The Domain Navigator uses square red bullets to mark activity classes and round blue bullets to signal activities. To expand the activity list box to see all of the activities at once, drag the border above the domain buttons downward using the mouse.

## Task Category Buttons

To see the details involved in working with an activity, select an activity from the activity list box. In the lower list box (the task list box), the Domain Navigator outlines a set of tasks required for working with the selected activity. Rather than list all of an activity's tasks at once, the Domain Navigator organizes the tasks according to task categories, each represented by a task category button (the Domain Navigator's lower set of buttons).



## Task Sets and Tasks

Similar to the activity list box, the task list box organizes its items into two levels: tasks and task sets. For activities that require several tasks of the same category, the Domain Navigator groups related tasks into task sets, producing a task list that is shorter and more manageable. The Domain Navigator uses round green bullets to indicate task sets and diamond-shaped yellow bullets to indicate tasks.

Double-click on a task set or click the "+" sign to its left and the Domain Navigator expands the task list to show all tasks. To contract an expanded task set and hide the component tasks, double-click on the task set or click the "-" sign to its left.

Double-click a table or drawing task, and the Domain Navigator loads the appropriate tables and accesses drawings so that you can create or examine the necessary data. Similarly, selecting a report or query task instructs the Domain Navigator to open the corresponding report or query view. To expand the task category list box to see all of its contents at once, drag the border above the domain buttons upward using the mouse.

## Procedure: Exploring the Windows Client/Server

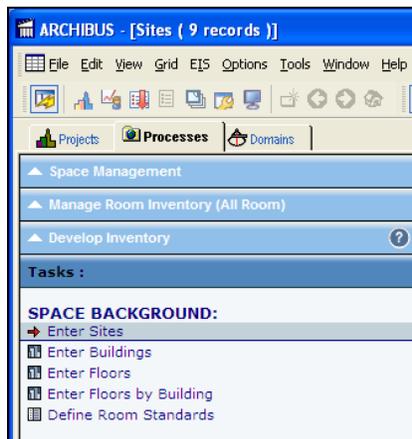
When first exploring ARCHIBUS, you will find it convenient to use the demonstration database that is shipped with the product. This demonstration software and database comes with suggested configurations, roles, and standard reports for displaying data. The following process describes how to enter the Headquarters (HQ) database to navigate to representative reports from each domain. This process will help you become familiar with generic ARCHIBUS reports, helping you to avoid duplicating the effort of generating reports which already come standard upon installation.

### Step 1: Start the HQ Project

1. Open the ARCHIBUS Windows application (Enterprise).
2. Double-click on the Headquarters project to connect to the HQ database.

### Step 2: Navigate to a task

1. Use the Process Navigator to drill down to a specific domain, activity, and process



### Step 3: Select the task

1. Click on a task to produce the desired report, form, or action.

### Step 4: View the report

Building Performance Analysis					
Page 1					
02/25/2009					
<b>Building Code:</b>	HQ	<b>Rentable Area:</b>	30,304.00		
<b>Building Name:</b>	Headquarters	<b>Service Area:</b>	180.00		
<b>Ext. Gross Area:</b>	32,000.00	<b>Usable Area:</b>	30,124.00		
<b>Int. Gross Area:</b>	30,304.00	<b>RU Ratio (R/U):</b>	1.01		
<b>Ext. Wall Area:</b>	1,696.00	<b>Efficiency Rate (U/R):</b>	99.41		
<b>Vert. Pen. Area:</b>	0.00				
Floor Code	Int. Gross Area	Rentable Area	Usable Area	RU Ratio (R/U)	Efficiency Rate (U/R)
16	0.00	0.00	0.00	0.00	0.00
17	7,576.00	7,576.00	7,542.00	1.00	100.00
18	7,576.00	7,576.00	7,464.00	1.00	99.00
19	7,576.00	7,576.00	7,542.00	1.00	100.00
RF	7,576.00	7,576.00	7,576.00	1.00	100.00
WARE	0.00	0.00	0.00	0.00	0.00

Notes

# Exercise 0021: Explore Real Estate Portfolio Management

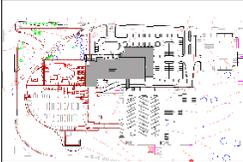
This exercises will walk you through a sampling of standard reports in the Real Estate Portfolio Management domain, a domain which helps track the use, key dates, and costs associated with owned or leased portfolio items like an organizations buildings, land, or structures.

## Step 1: View “Property Abstract”

- Using the Process Navigator, navigate to and select the following task: Real Estate Portfolio Management > Property Abstracts > Real Property Portfolio Manager > **View Property Abstracts.**

Property Abstract  
Page 1  
02/27/2009

Records for Property Code: 1 HARRISON PARK



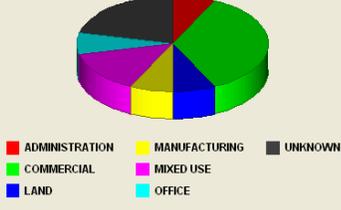

<b>Graphic - Map</b>	<b>Graphic - Property</b>	<b>Value</b> =====
<b>Property Name:</b> Harrison Corporate Park	<b>Date Purchased:</b> 10/01/2001	
<b>Location:</b> 1802 Market Street	<b>Date Book Value Assessed:</b> 01/01/2007	
<b>City Code:</b> PHILADELPHIA	<b>Date Market Value Assessed:</b> 10/01/2006	
<b>State Code:</b> PA	<b>Purchase Price:</b> \$7,000,000.00	
<b>Postal Code:</b> 19103	<b>Value - Book:</b> \$9,000,000.00	
<b>Site Code:</b> MARISET	<b>Value - Market:</b> \$7,000,000.00	
<b>Country Code:</b> USA	<b>Value - Assessed Prop. Tax:</b> \$7,000,000.00	
	<b>Value - Assessed School Tax:</b> \$6,000,000.00	
<b>Description:</b> TAX PARCEL	<b>Area - CAD:</b> 200,849.89	<b>Area</b> =====
<b>Property Use:</b> COMMERCIAL	<b>Land Acres:</b> 5.000	
<b>Property Status:</b> OWNED	<b>Parking Areas:</b> 2,000	
<b>Zoning Type:</b> COMMERCIAL	<b>Area - Parcel:</b> 200,849.89	
<b>Vicinity Type:</b> RESIDENTIAL	<b>Area - Bldg. Int. Gross:</b> 30,304.00	
<b>Property Fronts On:</b> Residential	<b>Area - Bldg. Usable:</b> 23,010.00	
<b>Highway Distance:</b> 2.00	<b>Area - Bldg. Est. Rentable:</b> 27,000.00	
<b>Airport Distance:</b> 20.00	<b>Area - Bldg. Rentable:</b> 25,442.00	
<b>Number of Buildings:</b> 6	<b>Area - Parking:</b> 54,141.36	
<b>Property Occupancy:</b> 2,000	<b>Area - Permeable:</b> 113,690.90	
<b>Primary Contact:</b> MS. JANE SMEDNY	<b>Area - Non-Permeable:</b> 54,141.36	
<b>Percent Owned:</b> 100.00	<b>Area - Lease Measured:</b> 11,081.20	
<b>Tax Rate - Property:</b> 0.028571	<b>Area - Lease Negotiated:</b> 17,000.00	
<b>Services Used:</b> GAS, ELECTRIC, SEWER, WATER		
<b>Comments:</b>		

## Step 2: View “Properties by Use”

- Using the Process Navigator, navigate to and select the following task: Real Estate Portfolio Management > Property Abstracts > Reports > **View Properties by Use Chart.**

Properties by Use Chart  
Page 1  
02/27/2009

Count (Area - CAD)



<b>ADMINISTRATION</b>	<b>MANUFACTURING</b>	<b>UNKNOWN</b>
<b>COMMERCIAL</b>	<b>MIXED USE</b>	
<b>LAND</b>	<b>OFFICE</b>	

Property Use	Property Code	Property Name	Description
<b>Records for Property Use: ADMINISTRATION</b>			
ADMINISTRATION	BOULEVARD PARI	Boulevard Industrial Park	TAX PARCEL
<b>Records for Property Use: COMMERCIAL</b>			
COMMERCIAL	1 HARRISON PARI	Harrison Corporate Park	TAX PARCEL
COMMERCIAL	BILLBOARD #2222	Billboard #2222	Billboard
COMMERCIAL	CELL TOWER #888	Cell Tower #8888	
COMMERCIAL	GENERAL LECLER	General Leclerc Park	
COMMERCIAL	SCIENCE-PARK-W	Science Park West	

### Step 3: View “Lease Abstracts”

- Using the Process Navigator, navigate to and select the following task: Real Estate Portfolio Management > Lease Abstracts > Lease Manager > **View Lease Abstracts (Fixed)**.



Lease Abstract  
Page 1 of 17  
2/27/2009

---

**Description**

Lease Code:	001	Space Owned?	No
Building Code:	HQ	Space Use:	N/A
Building Name:	Headquarters	Floor Description:	18th
Site:	MARKET	Landlord/Tenant:	TENANT

**Location:**

City:	PHILADELPHIA	Landlord Name:	The Stapleton Company
State:	PA	Landlord Contact:	MR. GLEN STAPLETON
Region:	EASTERN	Tenant Name:	Harrison Corporation
Country:	USA	Tenant Contact:	MR. BRIAN SCHWARTZ

**Start Date:** 6/1/2004      **Lease Occupancy:** 32  
**Move In Date:** 6/1/2004      **Total Suite Occupancy:** 32  
**End Date:** 6/1/2014

**Lease Signed?** Yes      **Comments:**  
**Lease Type:** NET      Hardcopy of Lease agreement stored in Company Files.  
**Lease With Lease:** LEASE  
**Parent Lease:**

---

**Financial Information**

	Net Income Statement		Security Deposit:
	Annual Average	Monthly Average	
<b>Rent Income:</b>	\$0.00	\$0.00	Note: All information shown in the Net Income calculations are average annual costs/revenues based on actual costs/revenues incurred between 7/1/2008 and 6/30/2009 as of 2/6/2009.
<b>Expenses:</b>			
Rent:	\$0.00	\$0.00	
Operating:	\$0.00	\$0.00	
Taxes:	\$0.00	\$0.00	
Other:	\$0.00	\$0.00	
<b>Total Expenses:</b>	\$0.00	\$0.00	
<b>Net Income:</b>	\$0.00	\$0.00	

**Areas**

Negotiated Rentable Area:	3,500.00	Measured Rentable Area:	3,340.50
Measured Common Area:	738.80	Measured Usable Area:	2,601.70
		<b>R/U Ratio:</b>	1.28

### Step 4: View “Vacant Suites”

- Using the Process Navigator, navigate to and select the following task: Real Estate Portfolio Management > Lease Abstracts > Develop Suite Inventory > **Highlight Vacant Suites**. (Note: Go to page 2 of the report)



Vacant Suites  
Page 2  
02/27/2009

Headquarters - 18th Floor

Building Code	Floor Code	Suite Code	Lease Code	Area - Usable	Area - Rentable
HQ	18	003		891.8	1,145.0

### Step 5: View “Invoices for Leases”

- Using the Process Navigator, navigate to and select the following task: Real Estate Portfolio Management > Cost Chargeback and Invoicing > Report on Receivables > **View Invoices for: Leases.**

**Invoices by Lease**  
Page 1 of 1  
2/27/2009

Lease Code: 001	Invoice Number: 1997000001	Invoice Terms: 60 DAYS
Building Code: HQ	Invoice Date: 4/1/2005	Invoice Status: ISSUED
	Send to: MR. MICHAEL BERNHART	Date Invoice Due: 6/1/2005
	PHILADELPHIA, PA	Remit to: MR. BRIAN SCHWARTZ
		AAA Inc.
		123 AAA Street
		BOSTON, MA 02109

**Invoice Description:**  
Invoice for services performed to improve tenant's suite per tenant's P.O. # 04637-583

Date	Description	Amount
3/31/2005	Services performed to create additional walls and remove some existing walls per tenant request.	\$10,000.00
3/31/2005	Tenant requested new carpeting in their lobby area. Carpeting was installed according to their specifications.	\$3,000.00
3/31/2005	Services performed to change existing electrical wiring. Tenant requested additional circuits so that they could run more equipment.	\$5,000.00
<b>Total Amount Due:</b>		<b>\$18,000.00</b>

### Step 6: View “Accounts Receivables”

- Using the Process Navigator, navigate to and select the following task: Real Estate Portfolio Management > Cost Chargeback and Invoicing > Report on Receivables > **View Accounts Receivable.**

**Accounts Receivable**  
Page 1  
02/27/2009

Send To	Invoice Number	Date Billed	Amount Invoiced	Amount Paid	Amount Balance	Date Due
A-DRAKE	2005000006		\$100.00	\$0.00	\$100.00	02/28/05
<b>Description:</b>			<b>\$100.00</b>	<b>\$0.00</b>	<b>\$100.00</b>	<b>Total fo</b>
ALLIED	2005000002	08/08/2005	\$25,000.00	\$25,000.00	\$0.00	09/08/05
<b>Description:</b> Invoice for services supplied.						
ALLIED	2005000004	07/08/2005	\$30,000.00	\$0.00	\$30,000.00	08/08/05
<b>Description:</b> Invoice for services supplied.						
			<b>\$55,000.00</b>	<b>\$25,000.00</b>	<b>\$30,000.00</b>	<b>Total fo</b>

### Step 7: View “Cost History Summary”

- Using the Process Navigator, navigate to and select the following task: Real Estate Portfolio Management > Cost Budgeting and Planning > Financial Planning > **View Cost History Summary.**

**PROPERTY COST HISTORY**  
From Year: 2004 To Year: 2009 From: Costs, Scheduled Costs, Recurring Costs

Cost Category	Income - Expenses 2004	Income - Expenses 2005	Income - Expenses 2006	Income - Expenses 2007	Income - Expenses 2008	Income - Expenses 2009
<b>Records for Property Code: 1 HARRISON PARK</b>						
ADMIN - TELEPHONE	-\$5,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BUILDING - ELECTRICLINE	\$0.00	\$6,850.00	-\$5,463.00	-\$5,572.26	-\$5,653.70	-\$2,533.85
CLEANING - CONTRAC	\$0.00	\$0.00	-\$3,000.00	-\$32,800.00	\$0.00	\$0.00
DISPOSITION - EQUIPME	\$0.00	\$5,000.00	\$5,500.00	\$6,050.00	\$6,655.00	\$7,320.50
FEE - ACCOUNTING EXH	\$0.00	-\$905.30	\$0.00	-\$1,050.00	-\$257.00	\$0.00
INTEREST - CONSTRUC	\$0.00	\$0.00	\$0.00	-\$198,000.00	-\$59,612.90	\$0.00
INTEREST - RENTAL INC	\$12,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PROJECT - CONSTRUC	\$0.00	\$13,000.00	\$0.00	\$0.00	\$0.00	\$0.00
RENT - BASE RENT	\$0.00	\$4,500.00	\$0.00	\$0.00	\$0.00	\$0.00
TAX - TAX	\$0.00	-\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00
UTILITY - ELECTRIC	\$0.00	-\$850.36	\$0.00	\$0.00	\$0.00	\$0.00
	<b>\$6,700.00</b>	<b>-\$222,306.66</b>	<b>-\$2,963.00</b>	<b>-\$231,372.26</b>	<b>-\$58,998.60</b>	<b>\$4,786.65</b>

Notes

# Exercise 0022: Explore Space Planning and Management

These exercises will walk you through a sampling of standard reports in the Space Planning and Management domain, a domain which helps track the efficiency and ownership/occupancy of space within a building.

## Step 1: View “Rooms by Building and Floor”

- Using the Process Navigator, navigate to and select the following task: Space Planning and Management > Space Inventory and Performance > Enhanced All Room Inventory > **View Rooms by Floor and Building**.

**Rooms by Building and Floor**  
Page 1  
02/25/2009

Building Code: HQ Address 1: Headquarters Address 2: Philadelphia, PA 19101 Total Room Dept. Area: 10,446.00  
 Building Name: 1802 Market Street Postal Code: 19103 Avg. Area per Floor: 6,000.0  
 Address 1: Total Room Area: 11,950.00

Building Code	Floor Code	Floor Name	Room Area	Room Dept. Area
HQ	16	Mixed Floor	1,952.00	1,278.00

Room Code	Room Standard	Division Code	Department Code	Room Area
101		ACCESSORIES	SALES	194.96
102A		ACCESSORIES	MARKETING	149.83
102B		ACCESSORIES	MARKETING	183.36
103	OFF-A	ACCESSORIES	MARKETING	188.41
104	OFF-A	ACCESSORIES	MARKETING	239.92
105	OFF-B	ACCESSORIES	DISTRIBUTION	248.28
106	OFF-B	ACCESSORIES	DISTRIBUTION	241.75
107	OFF-B	ACCESSORIES	DISTRIBUTION	293.51
108				248.28

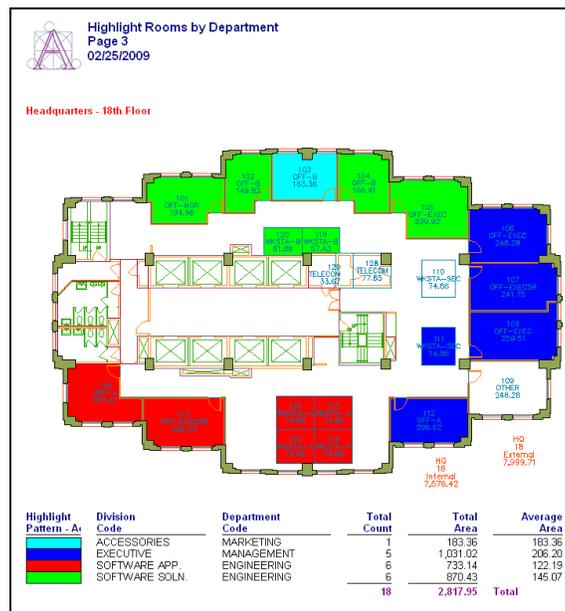
Building Code	Floor Code	Floor Name	Room Area	Room Dept. Area
HQ	17	Open-Plan Offices	3,202.00	2,821.00

Room Code	Room Standard	Division Code	Department Code	Room Area
000				0.00
101	WMSTA-A	ELECTRONIC SV	ENGINEERING	93.86
102	OFF-C	ELECTRONIC SV	ENGINEERING	140.15
103	WMSTA-TECI	ACCESSORIES	MARKETING	74.86
104	WMSTA-TECI	ELECTRONIC SV	ENGINEERING	74.86
105	WMSTA-TECI	ELECTRONIC SV	ENGINEERING	74.86
106	WMSTA-TECI	ELECTRONIC SV	ENGINEERING	74.86
107	WMSTA-TECI	ELECTRONIC SV	ENGINEERING	74.86

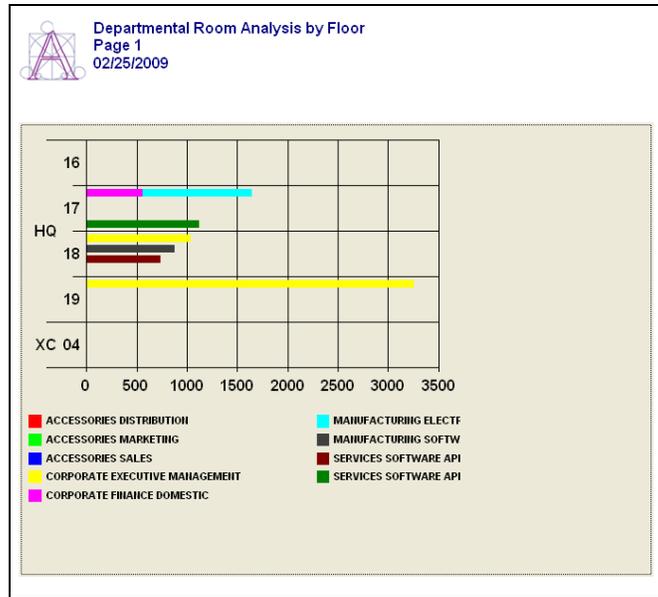
## Step 2: View “Highlight Rooms by Department”

- Using the Process Navigator, navigate to and select the following task: Space Planning and Management > Space Inventory and Performance > Enhanced All Room Inventory > **Highlight Rooms by Department**.



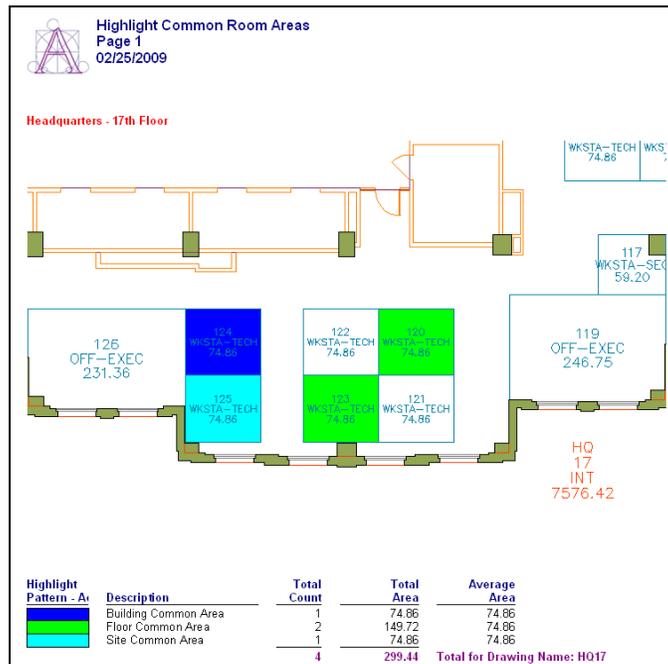
### Step 3: View “Departmental Room Analysis by Floor”

- Using the Process Navigator, navigate to and select the following task: Space Planning and Management > Space Inventory and Performance > Enhanced All Room Inventory > **Show Departmental Stack Plan.**



### Step 4: View “Common Area Rooms”

- Using the Process Navigator, navigate to and select the following task: Space Planning and Management > Space Chargeback > Standard Space Chargeback > **Highlight Common Area Rooms.**



### Step 5: View “Financial Statement by Division”

- Using the Process Navigator, navigate to and select the following task: Space Planning and Management > Space Chargeback > Standard Space Chargeback > **View Financial Statement by Division.**

Organizational Financial Statement by Division  
Page 1  
02/25/2009

Division Name	Chargeable Cost	Chargeable Area	Room Area	Total Common Area	Occupiable Common Area	Non
Electronic Systems	\$30,684.79	1,614.99	1,079.75	460.38	3,701.28	

Department Name	Chargeable Cost	Chargeable Area	Room Area	Total Common Area	Occupiable Common Area
Engineering	\$30,684.80	1,614.99	1,079.75	460.38	1,677.06

Building Code	Floor Code	Room Code	Chargeable Cost	Chargeable Area	Allocated Room Area	Total Common Area	Occupial Comm Ar
HQ	17	101	\$0.00	0.00	64.00	0.00	0.
HQ	17	102	\$0.00	0.00	48.00	0.00	0.
HQ	17	103	\$0.00	0.00	64.00	0.00	0.
HQ	17	104	\$0.00	0.00	64.00	0.00	0.
HQ	17	105	\$0.00	0.00	100.00	0.00	0.
HQ	17	106	\$0.00	0.00	64.00	0.00	0.
HQ	17	107	\$0.00	0.00	64.00	0.00	0.

### Step 6: View “Employees”

- Using the Process Navigator, navigate to and select the following task: Space Planning and Management > Personnel and Occupancy > Reports > **View Employees.**

Employees  
Page 1  
02/25/2009



**Honorific:** Mr  
**Employee Name:** ABBOT, PAUL  
**Employee Number:** 54021  
**Employee Standard:** ADMIN  
**Employee Telephone:** 998-6491  
**Email Address:** pabbott@dc  
**Building Code:** XC  
**Floor Code:** 04  
**Room Code:** 201  
**Division Code:** ACCESSORIES  
**Department Code:** MARKETING  
**Employee Graphic:** EM-ABBOT-PAUL.JPG

Employee Graphic



**Honorific:** Ms  
**Employee Name:** ABERNATHY, ALISON  
**Employee Number:** EXEC-SR  
**Employee Standard:** EXEC-SR  
**Employee Telephone:** 338-1011  
**Email Address:** abernathy\_alison@tgd  
**Building Code:** HQ  
**Floor Code:** 17  
**Room Code:** 126  
**Division Code:** ELECTRONIC SYS.  
**Department Code:** ENGINEERING  
**Employee Graphic:** EM-ABERNATHY-ALIK

Employee Graphic

Notes

## Exercise 0023: Explore Asset Management

These exercises will walk you through a sampling of standard reports in the Asset Management domain, a domain which helps track the value, movement, and ownership of furniture and equipment in a building.

### Step 1: View “Tagged Furniture Inventory...”

- Using the Process Navigator, navigate to and select the following task: Asset Management > Tagged Furniture Inventory > Manage Inventory > **View Tagged Furniture Inventory...**

**Tagged Furniture Counts by Standard by Department by Building**  
Page 1

**Building Code:** HQ      **City Code:** PHILADELPHIA  
**Address 1:** 1802 Market Street      **State Code:** PA  
**Address 2:** Philadelphia, PA 1910      **Int. Gross Area:** 143,952.66

Furniture Standard	Description	Furn. Std. Count	Total Std. Cost
<b>Records for Dept Code:</b>			
A-TBL-LG	Large Circular Table	2	
CHAIR-CONF	Conference Chair	2	
CHAIR-EXEC	Executive Office Chair	37	\$5,550.00
CHAIR-LOUNGE	Chair with arms	9	\$4,050.00
CHAIR-WORKSTATION	Workstation Chair	1	\$450.00
COUCH	2 Seat Couch	1	\$130.00
COUCH-CLOTH	2 Seat Cloth Couch	6	\$3,600.00
CREDENZA	Large Credenza	1	\$500.00
DESK-STD	Standard Office Desk	2	\$1,700.00
PODIUM		4	\$1,600.00
TABLE-CONF-120	Conference Table - 10 ft. long	3	\$867.00
TABLE-END	End Table, 24x24, glass top	11	\$5,500.00
TABLE-SMALL COFFEE	Small Coffee Table	7	\$1,050.00
		2	\$250.00
		<b>88</b>	<b>\$25,247.00</b>
<b>Records for Dept Code: ACCESSORIES MARKETING</b>			
CHAIR-EXEC	Executive Office Chair	1	\$450.00
DESK-EXEC	Executive Desk	1	\$1,040.00
		<b>2</b>	<b>\$1,490.00</b>

### Step 2: View “Tagged Furniture Inventory...(by Employee)”

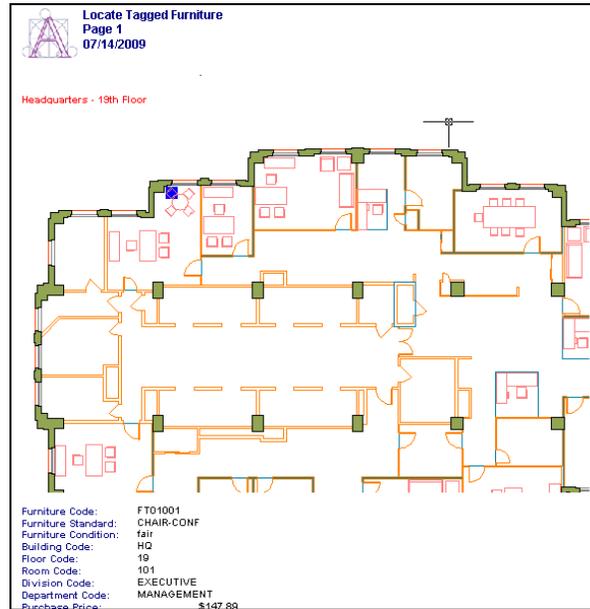
- Using the Process Navigator, navigate to and select the following task: Asset Management > Tagged Furniture Inventory > Manage Inventory > **View Tagged Furniture Inventory...**

**Tagged Furniture Inventory by Employee**  
Page 2

Employee Name	Employee Number	Employee Telephone	Employee Extension	Building Code	Floor Code
BABIC, PAUL		338-1011	436	HQ	18
<b>Furniture Code</b>	<b>Furniture Standard</b>	<b>Serial Number</b>	<b>Furniture Condition</b>	<b>Furn. Status</b>	
FT01030	CHAIR-EXEC	J660707	good	In use	
FT01080	CHAIR-OFFICE	3S7YE48	good	In use	
FT01081	CHAIR-OFFICE	3S7YE49	good	In use	
FT02018	DESK-EXEC	31R4E82	good	In use	
FT03002	FILE-LATERAL3	K529UE7	good	In use	
<b>Employee Name</b>	<b>Employee Number</b>	<b>Employee Telephone</b>	<b>Employee Extension</b>	<b>Building Code</b>	<b>Floor Code</b>
BADAWI, DANIEL			0	HQ	10
<b>Furniture Code</b>	<b>Furniture Standard</b>	<b>Serial Number</b>	<b>Furniture Condition</b>	<b>Furn. Status</b>	
FT02120	DESK-EXEC	J395F37	excellent	In use	

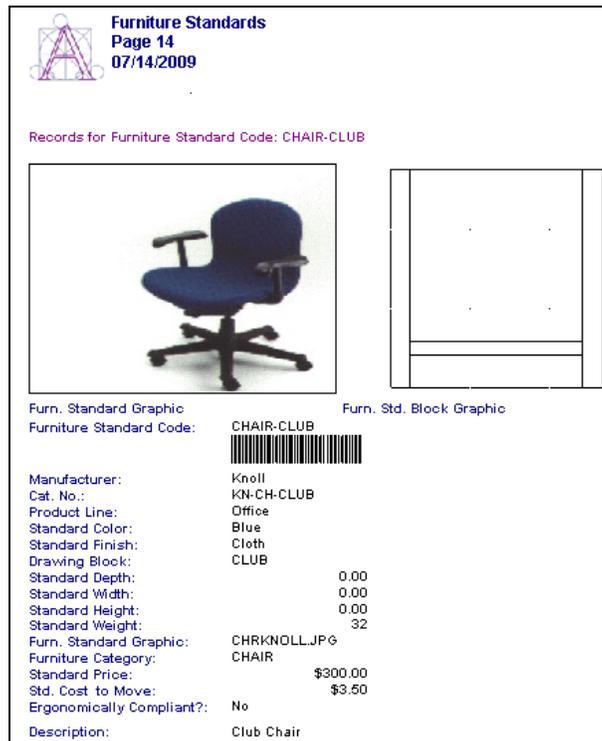
### Step 3: View “Locate Tagged Furniture”

- Using the Process Navigator, navigate to and select the following task: Asset Management > Tagged Furniture Inventory > Manage Inventory > **Locate Tagged Furniture.**



### Step 4: View “Furniture Standards Book”

- Using the Process Navigator, navigate to and select the following task: Asset Management > Tagged Furniture Inventory > Perform Survey > **View Furniture Standards Book.**



### Step 5: View “Tagged Furniture Discrepancies”

- Using the Process Navigator, navigate to and select the following task: Asset Management > Tagged Furniture Inventory > Perform Survey > **Compare Survey to Inventory.**

Records for Furniture Code: 1000000	
<b>Furniture Code:</b>	1000000
<b>Inventory Bldg Code:</b>	
<b>Inventory Floor Code:</b>	
<b>Inventory Room Code:</b>	
<b>Inventory Div Code:</b>	
<b>Inventory Dept Code:</b>	
<b>Inventory Emp Name:</b>	
<b>Inventory Furn. Status:</b>	
<b>Audit vs. Inv. Difference:</b>	Not in Inventory

Records for Furniture Code: 1000001	
<b>Furniture Code:</b>	1000001
<b>Inventory Bldg Code:</b>	
<b>Inventory Floor Code:</b>	
<b>Inventory Room Code:</b>	
<b>Inventory Div Code:</b>	
<b>Inventory Dept Code:</b>	
<b>Inventory Emp Name:</b>	
<b>Inventory Furn. Status:</b>	
<b>Audit vs. Inv. Difference:</b>	Not in Inventory

### Step 6: View “Report on Equipment Costs and Depreciation”

- Using the **Domain** Navigator, navigate to and select the following task: Furniture and Equipment > Create Management Reports > Report on Costs and Depreciation > Reports > **Equipment General Ledger Journal Entry.**

Equipment Code	Purchase Price	Depreciation Expense	Accumulated Depreciation	Current Value	Salvage Value	Install Date
<b>Records for Property Type: COMPUTER EQUIPMENT</b>						
IT01019	\$1,400.00	\$58.33	\$758.33	\$641.67	\$0.00	11/30/2003
IT01020	\$1,400.00	\$58.33	\$758.33	\$641.67	\$0.00	11/30/2003
IT01021	\$1,400.00	\$58.33	\$758.33	\$641.67	\$0.00	11/30/2003
IT04010	\$1,200.00	\$50.00	\$650.00	\$550.00	\$0.00	11/30/2003
IT04011	\$1,200.00	\$50.00	\$650.00	\$550.00	\$0.00	11/30/2003
IT01005	\$2,500.00	\$104.17	\$1,354.16	\$1,145.82	\$0.00	11/30/2003
IT01011	\$2,100.00	\$87.50	\$1,137.50	\$962.50	\$0.00	11/30/2003
IT01028	\$5,500.00	\$229.17	\$2,979.16	\$2,520.83	\$0.00	11/30/2003
IT01108	\$6,799.00	\$283.29	\$3,682.79	\$3,116.20	\$0.00	11/30/2003
IT04003	\$3,500.00	\$145.83	\$1,895.83	\$1,604.17	\$0.00	11/30/2003
IT04004	\$3,200.00	\$133.33	\$1,733.33	\$1,466.67	\$0.00	11/30/2003
IT04009	\$3,400.00	\$141.67	\$1,841.66	\$1,558.32	\$0.00	11/30/2003
IT01030	\$6,500.00	\$270.83	\$3,520.83	\$2,979.16	\$0.00	11/30/2003
IT01031	\$5,500.00	\$229.17	\$2,979.16	\$2,520.83	\$0.00	11/30/2003
IT01001	\$2,000.00	\$83.33	\$1,083.33	\$916.67	\$0.00	11/30/2003
IT01002	\$2,000.00	\$83.33	\$1,083.33	\$916.67	\$0.00	11/30/2003
IT01004	\$2,000.00	\$83.33	\$1,083.33	\$916.67	\$0.00	11/30/2003
		<b>\$2,149.94</b>	<b>Total for Property Type: COMPUTER EQUIPMENT</b>			

Notes

## Exercise 0024: Explore Building Operations

These exercises will walk you through a sampling of standard reports in the Building Operations domain, a domain which helps track the costs and schedules of maintenance, be it preventive or reactive, performed on building areas and equipment.

### Step 1: View “PM Work Forecast by Trade by Building”

- Using the Process Navigator, navigate to and select the following task: Building Operations > Preventive Maintenance > Forecast Work and Resources > **View PM Work Forecast by Trade by Building.**

PM Date	Building Code	Primary Trade	PM Schedule Code	PM Procedure	Equipment Code	Floor Code
Records for PM Date: 07/05/2005						
07/05/2005	HQ	HVAC TECHNICIAN	18	AHU-3-MONTH	HVAC-AHU14V	RF
07/05/2005		TRADES ASSISTANT	104	FIRE EXT MONTHL	SAF01027	
07/05/2005		TRADES ASSISTANT	105	FIRE EXT MONTHL	SAF01028	
07/05/2005		TRADES ASSISTANT	106	FIRE EXT MONTHL	SAF01029	
07/05/2005		TRADES ASSISTANT	107	FIRE EXT MONTHL	SAF01030	
07/05/2005		TRADES ASSISTANT	108	FIRE EXT MONTHL	SAF01031	
07/05/2005		TRADES ASSISTANT	109	FIRE EXT MONTHL	SAF01032	
07/05/2005		TRADES ASSISTANT	110	FIRE EXT MONTHL	SAF01033	
07/05/2005		TRADES ASSISTANT	111	FIRE EXT MONTHL	SAF01034	

### Step 2: View “52 Week PM Work Schedule by Trade Monthly”

- Using the Process Navigator, navigate to and select the following task: Building Operations > Preventive Maintenance > Forecast Work and Resources > **View 52-week PM Work Schedule by Trade Monthly.**

Trade Code	May 2005	June 2005	July 2005	August 2005	September 2005	October 2005
CARPENTER-II	1.0	1.0	1.0	1.0	1.0	1.0
COMPUTER TECH	5.0	2.0	2.5	5.0	2.5	6.0
ELECTRICIAN-I	8.0	16.0	4.0	8.0	16.0	4.0
ELECTRICIAN-III	1.0				8.0	
EQUIPMENT TECH	5.0	1.0	1.0	1.0	1.0	1.0
HVAC - ENGINEER	3.0	3.0	3.0	3.0	6.0	6.0
HVAC TECHNICIAN	16.0	32.0	8.0	16.0	32.0	8.0
JANITORIAL	2.0	2.0	2.0	2.0	2.0	2.0
MECHANIC	91.0	197.0	53.0	76.0	152.0	36.0
MULTI-TRADE II	24.0	56.0	16.0	16.0	32.0	8.0
TRADES ASSISTANT	31.5	31.5	31.5	31.5	31.5	31.5
	<b>187.5</b>	<b>341.5</b>	<b>122.0</b>	<b>159.5</b>	<b>284.0</b>	<b>105.5</b>

### Step 3: View “Generate Equipment PM Work Orders”

- Using the Process Navigator, navigate to and select the following task: Building Operations > Preventive Maintenance > Generate Equipment PM Work Orders > **Generate Equipment PM Work Orders.**

### Step 4: "Create Work Request"

- Using the Process Navigator, navigate to and select the following task: Building Operations > On Demand Work > Requestor > **Create Work Request**.

### Step 5: View "Issue and Print Work Orders"

- Using the Process Navigator, navigate to and select the following task: Building Operations > On Demand Work > Supervisor - Generate Work Orders > **Issue and Print Work Order(s)**.

<b>Work Order Code:</b> 1999000016				
<b>Records for PM Procedure: AHU-6-MONTH - 6 Month Air Handling Unit PM</b>				
<b>Work Request Code:</b> 950000150	<b>Building Code:</b> HQ			
	<b>Floor Code:</b> RF			
<b>Date to Perform:</b> 01/22/2008	<b>Room Code:</b>			
<b>Equipment Code:</b> HVAC-AHU15	<b>Date Work Completed:</b>			
<b>Equipment Standard:</b> AIR-HANDLER-30HP				
<b>Work Request Status:</b> Issued and In Process				
<b>Work Description:</b> SAFETY: 1. Lock out and Tag out unit prior to work.				
<b>Trade Code</b>	<b>Date Trade Assigned</b>	<b>Estimated Hours</b>	<b>Date Finished</b>	<b>Straight time Trade Hours</b>
MECHANIC	01/22/2008	8.00		0.00
<b>Additional Comments:</b>				
MULTI-TRADE II	01/22/2008	8.00		0.00
<b>Additional Comments:</b>				
<b>Part Code</b>	<b>Date Part Assigned</b>	<b>Quantity Estimated</b>	<b>Parts Status</b>	<b>Quantity Used</b>
BELT-FAN-42-5	01/22/2008	2.000	Not in Stock	0.000
<b>Additional Comments:</b>				
FILTER-24X36X2	01/22/2008	1.000	Reserved	0.000
<b>Additional Comments:</b>				

### Step 6: View “Work Summary”

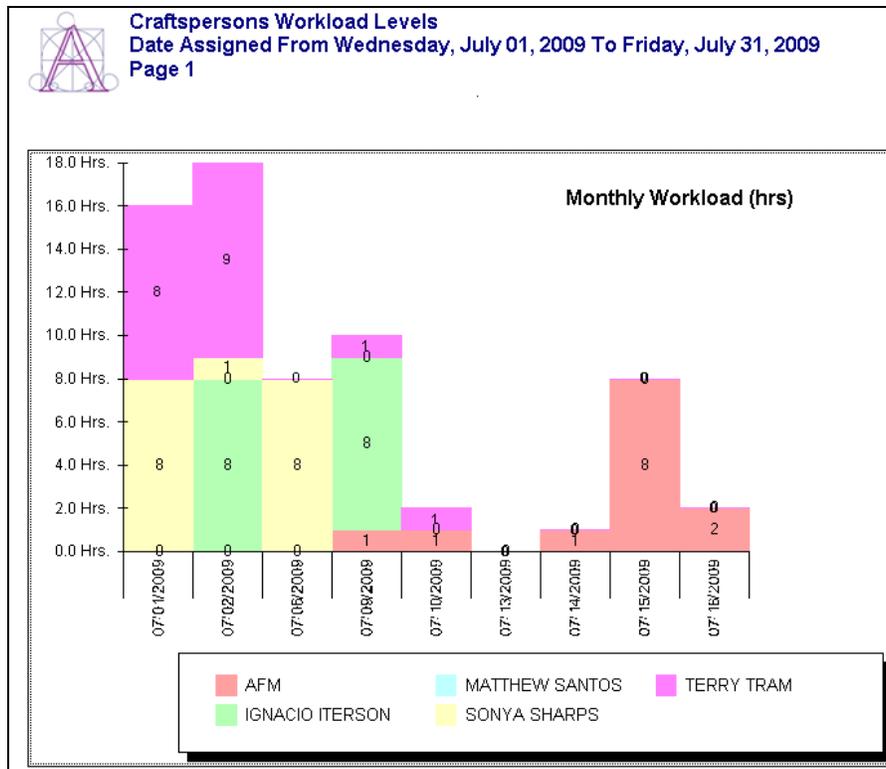
- Using the Process Navigator, navigate to and select the following task: Building Operations > Work History and Finances > Review Work Summary and Labor Analyses > **Review Work Summary.**

**Work Summary from Sat Dec 30, 1899 to Tue Jul 14, 2009**  
Page 1

Problem Type	Request Count	Avg. Response Time (Hrs)	Estimated Labor Hours	Actual Labor Hours	Cost of Labor	Cost of Parts	Estimated Total Cost	Total Cost	
AN EMERGENCY	1	243.0	0.00	2.00	\$28.00	\$0.00	\$0.00	\$28.00	
CEILING TILE	1	865.0	0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00	
DOOR	1	675.0	0.00	1.00	\$9.00	\$0.00	\$0.00	\$9.00	
ELECTRICAL	1	194.0	0.00	8.00	\$144.00	\$0.00	\$0.00	\$144.00	
INSTALL	2	339.0	0.00	10.00	\$228.00	\$2.00	\$0.00	\$230.00	
LIGHTBULB	1	793.0	0.00	1.00	\$25.00	\$12.00	\$0.00	\$37.00	
SAFETY	1	793.0	0.00	1.00	\$15.00	\$0.00	\$0.00	\$15.00	
TEMP. ADJUSTME	1	625.0	0.00	0.00	\$2.00	\$0.00	\$0.00	\$2.00	
	<b>9</b>	<b>565.9</b>	<b>0.00</b>	<b>23.00</b>	<b>\$451.00</b>	<b>\$14.00</b>	<b>\$0.00</b>	<b>\$465.00</b>	Total Average
	<b>9</b>	<b>565.9</b>	<b>0.00</b>	<b>23.00</b>	<b>\$451.00</b>	<b>\$14.00</b>	<b>\$0.00</b>	<b>\$465.00</b>	Total Average
PREVENTIVE MAINT	36	1,120.1	92.00	87.00	\$1,478.00	\$144.00	\$2,056.00	\$2,022.00	Total Average
	<b>36</b>	<b>1,120.1</b>	<b>92.00</b>	<b>87.00</b>	<b>\$1,478.00</b>	<b>\$144.00</b>	<b>\$2,056.00</b>	<b>\$2,022.00</b>	Total Average
	<b>45</b>	<b>627.5</b>	<b>92.00</b>	<b>110.00</b>	<b>\$1,929.00</b>	<b>\$158.00</b>	<b>\$2,056.00</b>	<b>\$2,487.00</b>	Total Average

### Step 7: View “Craftsperson Workload Levels”

- Using the Process Navigator, navigate to and select the following task: Building Operations > Work History and Finances > Review Work Summary and Labor Analyses > **Review Craftsperson Workload Levels.**



*Notes*

## Exercise 0025: Explore Capital Project Management

These exercises will walk you through a sampling of standard reports in the Capital Project Management domain, a domain which helps track the conditions and sustainability of building areas and equipment, and helps prioritize the cost and effectiveness of repairing or replacing building components and buildings.

### Step 1: View “Edit Condition Assessments”

- Using the Process Navigator, navigate to and select the following task: Capital Project Management > Manage Condition Assessments > **Edit Items**.

Project: ASSESSMENT-HQ-17-2003-QTR2 Building: Assessed By: Inspector C Floor: Site: Room: Problem Location: Equipment Code: Description: Broken ceiling tile

Assessed By	Site Code	Building Code	Floor Code	Room Code	Equipment Code	Problem Location	Description
Inspector C	MARKET	HQ	17	101		Ceiling	Broken ceiling tile
Inspector C	MARKET	HQ	17	101		Ceiling	Ceiling tile missing
Inspector C	MARKET	HQ	17	102		East Wall	Marks on wall.
Inspector C	MARKET	HQ	17	102		East Wall	Wall has extensive cracks.
Inspector C	MARKET	HQ	17	103		Floor	Carpet is a bit torn up, threads are peeling.
Inspector C	MARKET	HQ	17	103		Floor	Carpet is a bit torn up, threads are peeling.
Inspector C	MARKET	HQ	17	104		West Wall	Water stains on wall.
Inspector C	MARKET	HQ	17	105		Northwest Wall	Window is stuck shut.
Inspector C	MARKET	HQ	17	106		Floor	Carpet has holes in it.
Inspector C	MARKET	HQ	17	106		Floor	Carpet has holes in it.
Inspector C	MARKET	HQ	17	106		Walls	Black marks on all walls.
Inspector C	MARKET	HQ	17	107		Walls	Black marks on all walls.
Inspector C	MARKET	HQ	17	108		Back corner ne	Hole in wall.
Inspector C	MARKET	HQ	17	108		Back corner ne	Hole in wall.

Assessed By: Inspector C Conditions Priority: Company Image  
 Site Code: MARKET Conditions Value: Fair  
 Building Code: HQ Recommended Action: Replace  
 Floor Code: 17 Description: Add Standard Description  
 Room Code: 101 Broken ceiling tile  
 Problem Location: Ceiling  
 Equipment Code:

Filter Add Clear Cancel Save Help Close Window

### Step 2: View “Scoreboard”

- Using the Process Navigator, navigate to and select the following task: Capital Project Management > Manage Condition Assessments > **View Scoreboard**.

Condition Assessment Scoreboard		Unsuitable	Poor	Fair	Good	Very Good	Not Entered
Project(s): ASSESSMENT-HQ-17-2003-QTR2							
Life Safety	Estimated Budget (\$)	540			625		
	# of Items	2	0		4	0	0
Code Compliance	Estimated Budget (\$)	940					
	# of Items	5	0	0	0	0	0
Facility Loss	Estimated Budget (\$)			38735			
	# of Items	0	0	8	0	0	0
Environ. Code	Estimated Budget (\$)						
	# of Items	0	0	0	0	0	0
Mission Support	Estimated Budget (\$)	350			7925	1200	
	# of Items	1	0		14	2	0
Delayed Priority	Estimated Budget (\$)				17000		
	# of Items	0	0	1	0	0	0
Cost Effective	Estimated Budget (\$)		42200				
	# of Items	0	2	0	0	0	0
Def. Renovation	Estimated Budget (\$)			28000	600		
	# of Items	0	0	6	1	0	0
Company Image	Estimated Budget (\$)			270			
	# of Items	0	0	6	0	0	0
Maintain	Estimated Budget (\$)			2230	50		
	# of Items	0	0	14	2	0	0
Not Entered	Estimated Budget (\$)						
	# of Items	0	0	0	0	0	0

### Step 3: View “Condition Assessment Items by Level 3 Classifications”

- Using the Process Navigator, navigate to and select the following task: Capital Project Management > Management Reports > **View Equipment Assessment Items by Level 3 Classifications.**



**Equipment Condition Assessments by Level 3 Classifications**  
Page 1  
07/15/2009

**Document File 1**

**Equipment Code:** HVAC-COND-02  
**Equipment Standard:** CONDENSER  
**In-Service Date:** 06/10/2000  
**Classification Code:**  
**Site Code:** MARKET  
**Building Code:** HQ  
**Floor Code:** RF  
**Room Code:**  
**Problem Location:** West Wall  
**Action Item ID:** 66  
**Date Assessed:** 05/06/2003  
**Description:** Cooling coils dirty.

**Conditions Priority:** Maintain  
**Conditions Value:** Fair  
**Status:** N/A

**Condition Rating - Avg:** 3.0  
**Facility Index - Avg:** 200.0  
**Cost - Est. Baseline (Exp.):** \$100.00  
**Cost - Est. Baseline (Cap.):** \$0.00  
**Cost - Estimated Total:** \$100.00  
**Cost To Replace:** \$500.00  
**Useful Life Remaining - Avg:** 1



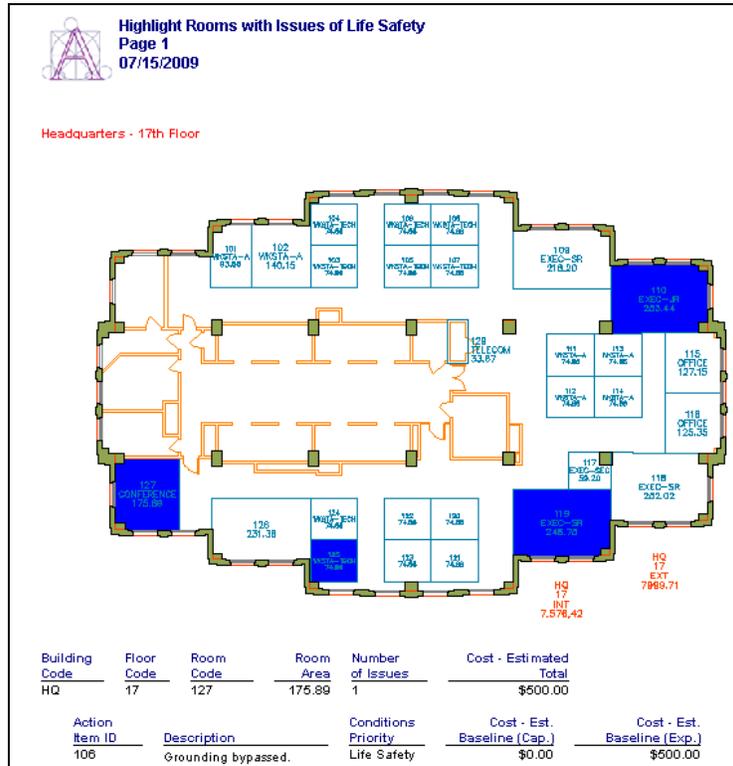
### Step 4: View "Building Conditions Summary”

- Using the Process Navigator, navigate to and select the following task: Capital Project Management > Management Reports > **View Building Conditions Summary.**

Summary for view Building Conditions Summary								
Date Created: 07/15/2009								
Time Created: 11:44:07am								
Building Code	Building Name	Count	Condition Rating - Avg	Facility Index - Avg	Cost - Est. Baseline (Exp.)	Cost - Est. Baseline (Cap.)	Cost - Estimated Total	Cost To Replace
HQ	Headquarters	68	16.6	558.1	\$21,665.00	\$119,000.00	140,665.00	\$570,455.00
<b>Total</b>		<b>68</b>	<b>16.6</b>	<b>558.1</b>	<b>\$21,665.00</b>	<b>\$119,000.00</b>	<b>140,665.00</b>	<b>\$570,455.00</b>

### Step 5: View "Rooms with Issues of Life Safety"

- Using the Process Navigator, navigate to and select the following task: Capital Project Management > Operational Reports (Drawings) > **Highlight Rooms with Issues of Life Safety.**



Notes

## Exercise 0026: Explore Strategic Master Planning

These exercises will walk you through a sampling of standard reports in the Strategic Master Planning domain, a domain which helps plan and forecast the use of space, and capture historical space use trends.

### Step 1: View “Compare Budgets or Periods”

- Using the Process Navigator, navigate to and select the following task: Strategic Master Planning > Space Programming and Forecasting > Forecast Space Needs > **Compare Budgets or Periods.**

 **Space Budgets Comparison: Budget of Departmental Room Area | Programmed versus Budget of Departmental Room Area | Current Year Forecast Q3**  
Page 1

Department Code	Buildir Alloca	Floor Alloca	al Room Area Programmed	tal Room Area r Forecast Q3	alue minus 1st Value	First Space Cost	Second Space Cost	Area: First	Area: Second	rea Change: Second
ACCOUNTING	HQ	17	20.0	30.0	10.00	40,000.00	60,000.00	2,000.0	3,000.0	1,000.0
ADMINISTRATION	HQ	17	25.0	40.0	15.00	50,000.00	80,000.00	2,500.0	4,000.0	1,500.0
ENGINEERING	HQ	18	10.0	15.0	5.00	20,000.00	30,000.00	1,000.0	1,500.0	500.0
MARKETING	HQ	19	5.0	10.0	5.00	10,000.00	20,000.00	500.0	1,000.0	500.0
OPERATIONS-MAIN	HQ	17	3.0	5.0	2.00	6,000.00	10,000.00	300.0	500.0	200.0
PRODUCTION	HQ	18	5,000.0	6,050.0	1,050.00	100,000.00	121,000.00	5,000.0	6,050.0	1,050.0
R AND D	HQ	18	3.0	3.0	0.00	6,000.00	6,000.00	300.0	300.0	0.0
SALES	HQ	19	10.0	14.0	4.00	20,000.00	28,000.00	1,000.0	1,400.0	400.0
						<b>252,000.00</b>	<b>355,000.00</b>	<b>12,600.0</b>	<b>17,750.0</b>	<b>5,150.0</b>

### Step 2: View “Forecast Counts at the Department Level”

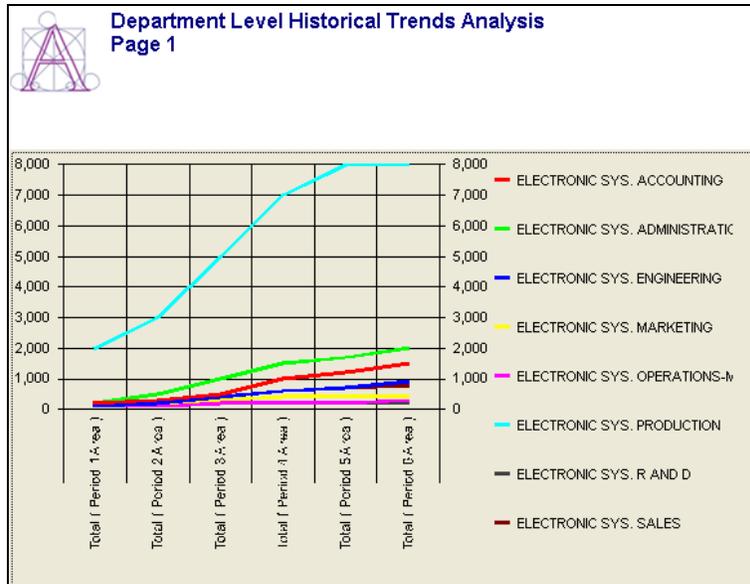
- Using the Process Navigator, navigate to and select the following task: Strategic Master Planning > Space Programming and Forecasting > Forecast Space Needs > **View Forecast Counts for: ...Department Level.**

 **Department Level - Costs For Budget of Dept. Employee Counts**  
Page 1

Department Code	Room Standard	Value: Programmed	Programmed Space Cost	r Forecast Q2 Space Cost	r Forecast Q3 Space Cost	r Forecast Q4 Space Cost	r Forecast Q1 Space Cost
<b>Records for Division Code: ACCESSORIES</b>							
DISTRIBUTION	PEOPLE	13.0	26,000.00	30,000.00	34,000.00	38,000.00	42,000.00
MARKETING	PEOPLE	16.0	32,000.00	34,000.00	36,000.00	38,000.00	40,000.00
SALES	PEOPLE	3.0	6,000.00	6,000.00	8,000.00	10,000.00	12,000.00
			<b>64,000.00</b>	<b>70,000.00</b>	<b>78,000.00</b>	<b>86,000.00</b>	<b>94,000.00</b>
<b>Records for Division Code: ELECTRONIC SYS.</b>							
ENGINEERING	PEOPLE	21.0	42,000.00	42,000.00	42,000.00	42,000.00	42,000.00
			<b>42,000.00</b>	<b>42,000.00</b>	<b>42,000.00</b>	<b>42,000.00</b>	<b>42,000.00</b>

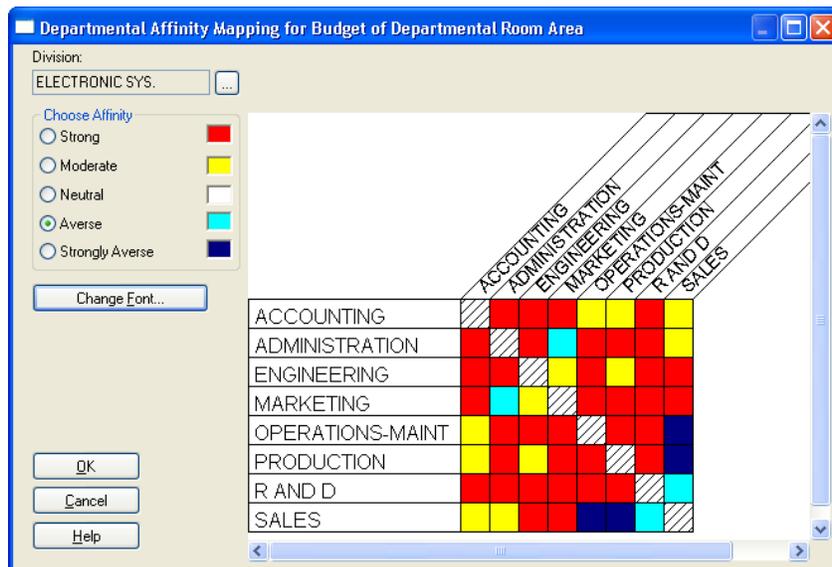
### Step 3: View “Historical Trend Analysis: Department Level”

- Using the Process Navigator, navigate to and select the following task: Strategic Master Planning > Space Usage History > Manage Space Usage History > **View Historical Trend Analysis: Department Level.**



### Step 4: View “Affinity Mapping”

- Using the **Domain Navigator**, navigate to and select the following task: Strategic Master Planning > Allocation > Actions > **Enter Affinities.**



## Review Questions: Windows Client/Server Overview

- 1.) ARCHIBUS includes which of the following software components?
  - A. *Web-based software*
  - B. *Windows software*
  - C. *CAD software*
  - D. *All of the above*
  
- 2.) Why are ARCHIBUS domains broken down into activities?
  - A. *To allow the Web and Windows applications to communicate with a single database*
  - B. *To group tasks appropriate to a specific business function and role*
  - C. *To allow the CAD and Windows applications to communicate with a single database*
  - D. *All of the above*
  
- 3.) What can happen when a user selects a task?
  - A. *A report appears*
  - B. *A form appears*
  - C. *A drawing appears*
  - D. *A dialog box appears*
  - E. *All of the above*
  
- 4.) Which benefit is not specifically a result of the ARCHIBUS integration with CAD?
  - A. *Drawing-embedded reports*
  - B. *Web and Windows users see updated room areas instantly when CAD plans are modified*
  - C. *A role-based navigator*
  - D. *CAD objects accurately retain organizational data and get updated when re-positioned or modified*
  
- 5.) What word does ARCHIBUS use to describe the combination of a single database with its associated files?
  - A. *Database*
  - B. *Project*
  - C. *Process*
  - D. *Activity*
  
- 6.) How does ARCHIBUS organize business-oriented functionality on its Process and Domain Navigators?
  - A. *Domains, Activities, Processes, Tasks*
  - B. *Modules, Processes, Activities, Tasks*
  - C. *Domains, Categories, Tasks*
  - D. *Modules, Categories, Processes, Tasks*
  
- 7.) Of the following business-related functions, which are not official ARCHIBUS domains?
  - A. *Space Planning and Management and Building Operations*
  - B. *Real Estate and Portfolio Management and Capital Project Management*
  - C. *Workplace Services and Move Management*
  - D. *Financial Accounting and Inventory Management*
  
- 8.) Which report is not available in the ARCHIBUS Space Planning and Management domain?
  - A. *Highlight Rooms by Department*
  - B. *Departmental Stack Plan*
  - C. *Highlight Common Area Rooms*
  - D. *Room Budget by Year*



# Appendix: Windows Client/Server Overview

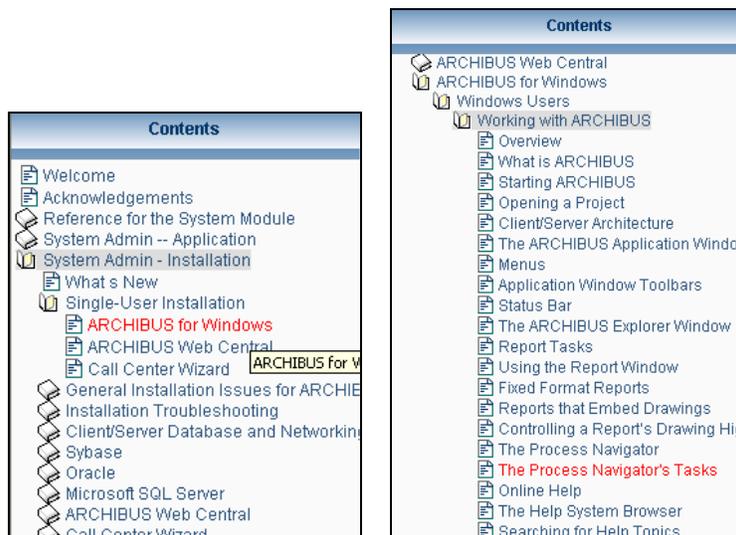
## Contents:

- Single-User Enterprise Installation
- Review Solutions

## Further Reading:

For a better understanding of ARCHIBUS Enterprise, users should research the following topics using the ARCHIBUS Help text:

- Installation
- Domain and Process Navigator References





## Single-User Installation of ARCHIBUS Desktop Client

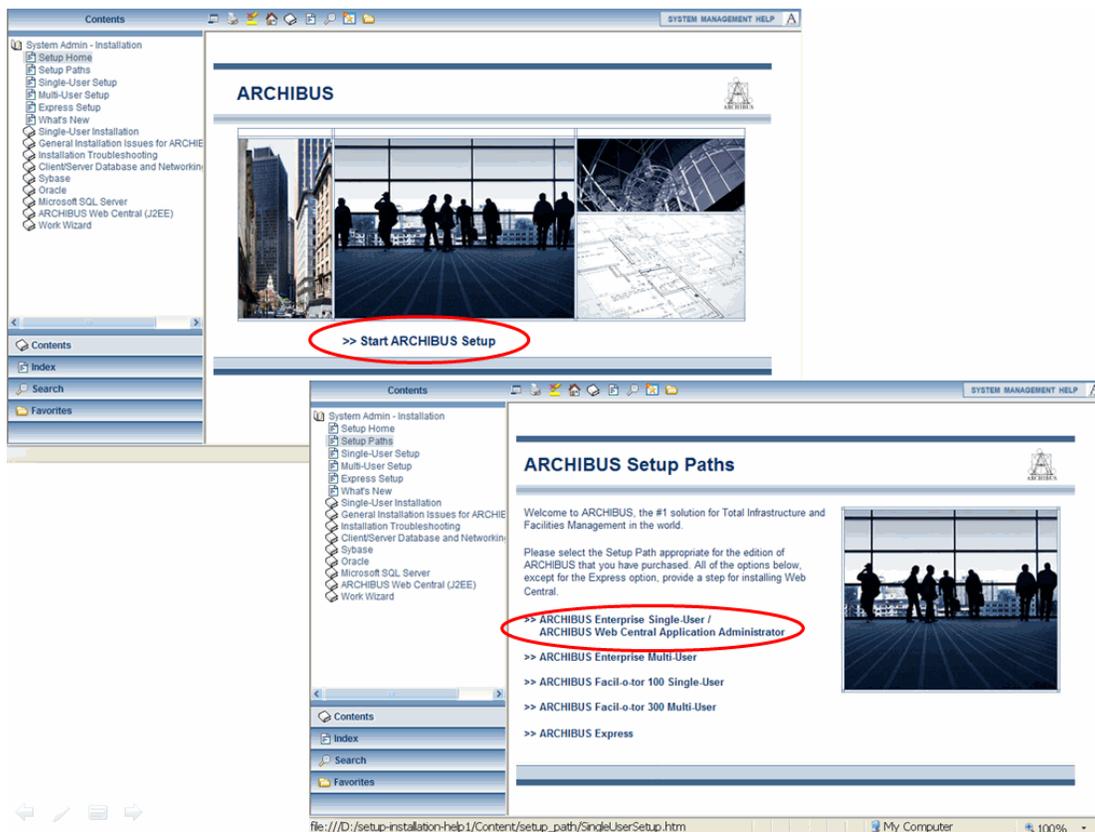
This topic covers the basic, single-user, Windows installation procedure.

### Step 1 – Copy License File to Computer

1. Insert the ARCHIBUS license file CD.
2. Open the license file CD.
3. Copy the license file to your desktop.

### Step 2 - Install ARCHIBUS

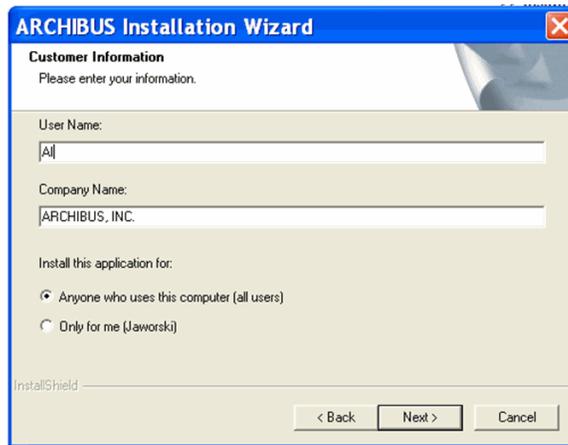
1. Shut down all other programs.
2. Place the product CD in your CD ROM drive. The Setup Path should start automatically. If it does not, use the Windows Explorer to navigate to the CD, and double-click on the AutorunPro.exe program.
3. On the Setup Home Page, click Start ARCHIBUS Setup and then ARCHIBUS Single User.



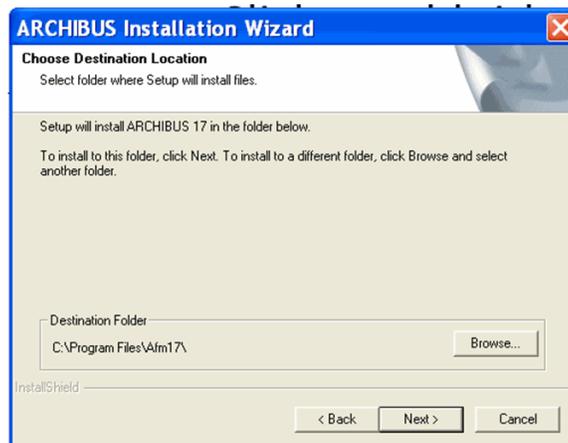
- Click Install ARCHIBUS (Windows), which will run the Windows Setup/Setup.exe program. By default, setup will install the ARCHIBUS application and the Sybase Single User/Runtime database server.



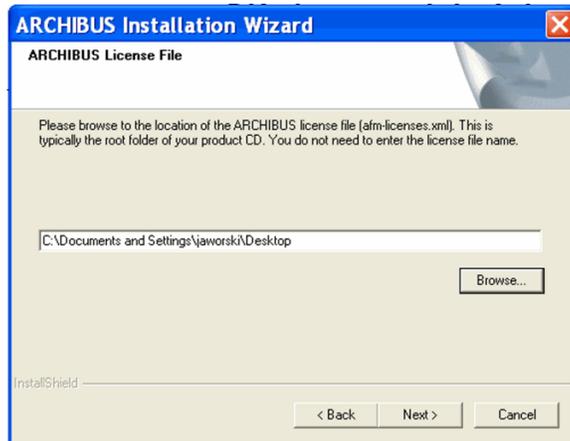
- In the Customer Information dialog, verify your Windows user name (Setup completes this field by default). Optionally, you can install ARCHIBUS for use only by the default Windows user (the default user name entered by Setup) by selecting "Only for me" in the Customer Information dialog.



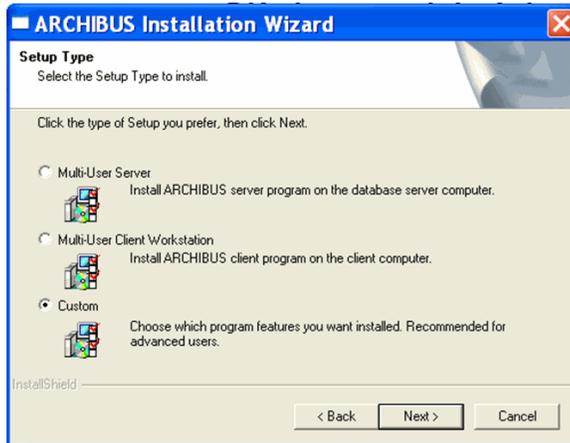
- Choose a destination location for the ARCHIBUS program (such as, c:\program files\lafmxx\).



- Browse to the location to which you have copied the license file in Step 1.



- For Setup Type, choose Custom.



- In the Select Features Dialog box select Next without making any changes.



- Select Finish after installation ends.

Notes

## Review Solutions: Windows Client/Server Overview

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