Integrated Workplace Management System (IWMS) Planon Implementation Project

Monty Combs, Director of Systems & Services
November 2019
Topics

- IWMS Project – Goals and Scope
- IWMS selection process
- Planon Implementation Project
Facilities Management

We Care

Mission Statement
The mission of Facilities Management is to support the University by enhancing the quality of physical facilities. We do this through planning, designing, engineering, constructing, and maintaining in a responsive, service-oriented, effective, and environmentally-conscious manner.

Respect:
We are committed to developing mutual respect through soliciting input, active listening and communicating, recognizing diverse points of view, and giving and receiving constructive feedback.

Customer Service:
We are committed to understanding the needs of the Brown community, communicating effectively, and delivering solutions in a courteous, professional, and timely manner.

Collaborative Relationships:
We are committed to building strong, successful partnerships within our department, the University, and the community.

Stewardship:
We are committed to respecting the history and traditions of our University, we strive to preserve the character of our buildings and grounds, and to create and maintain a safe, attractive, and environmentally conscious atmosphere.

Excellence:
We are committed to the highest standards of quality and performance and dedicated to continuous improvement across the department.

Effectiveness:
We are committed to developing efficient processes and delivering services that are fiscally, operationally, and environmentally responsible with an emphasis on proactive solutions.

Employee Development:
We are committed to promoting the professional development of our employees' skills and expertise, and to attracting and retaining highly-qualified individuals.
Planon Project Goal Themes

1. **Customer Service** - Reliability & Predictability

2. Effectiveness & Efficiency

3. Decision Support
   - Business Intelligence; Metrics & Reporting

4. Data Interoperability – system interfaces

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We are implementing a technology solution that will enable FM to better serve both our customers and the mission of Brown University. We are positioning Brown to take advantage of new technologies and for us to perform our jobs more effectively.
IWMS Project - Why?

- Replace aging FAMIS software
- New capabilities and features that align with our goals
System Integrations

Planon-Workday Interfaces as of Sept 2018

Planon Directory

Planon Time-Cards

Planon Work-Order Mgmt

Workday HCM

Workday FIN

BROWN PEOPLE
INT-2000 Daily
FM EMPLOYEES
INT-006 Daily
FM TIME-OFF
INT-2010 Hourly
WORKTAGS
INT-2020 Daily
SUPPLIERS
INT-1070 Daily
PURCHASE ORDERS
INT-2040 Hourly
PAYMENTS
INT-1045 Daily
Invoice/Credits
INT-1030 Daily
Billing-Export
INT-1092 Monthly
PAYROLL
INT-110 Weekly
Product Selection Process
Fall 2015

• IDENTIFY PRODUCT CANDIDATES

• REVIEW PEER INSTITUTIONS

<table>
<thead>
<tr>
<th>School Name</th>
<th>Maintenance Management</th>
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<tr>
<td>Brown University</td>
<td>Accruent - FAMIS</td>
</tr>
<tr>
<td>Columbia University</td>
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<td>MIT</td>
<td>SAP</td>
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<td>Princeton University</td>
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<td>Planon Universe</td>
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<td>FM Systems</td>
<td>FM Interact</td>
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<td>Infor</td>
<td>EAM</td>
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<td>FALM-Facility and Asset LifeCycle Mgmt</td>
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<td>Four Rivers(Accruent)</td>
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<td>19</td>
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March 2016

- PRODUCT DEMONSTRATIONS
- REGROUP
- CONSULTANT ENGAGEMENT

Barkley Advisory Group LLC

Conducted interviews with 60 Stakeholders
April 2017

- PROCESS DESIGN SESSIONS
June 2017

- **RFP DEVELOPMENT**

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<tr>
<th>REQ #</th>
<th>Sub-Category</th>
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<td>M1</td>
<td>Configuration and Display</td>
<td>Active and Inactive Values</td>
<td>System administrators can set active/inactive flags or start and expiration dates for work order LOVs, such as maintenance types, priority codes, status codes, and other request categorizations.</td>
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<td>M2</td>
<td>Configuration and Display</td>
<td>Crew Configuration</td>
<td>The system administrator can identify multiple sub-groups within each crew with the ability to assign a crew chief or leads to each sub-group.</td>
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<td>Configuration and Display</td>
<td>Email Configuration</td>
<td>System administrators can configure email notification templates and integrate data into the email body from the service request information fields.</td>
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<td>M4</td>
<td>Configuration and Display</td>
<td>Form Configuration</td>
<td>The system administrator can configure which work order fields are displayed, add and rearrange the fields on printed work order ticket and mobile devices. The system allows user-definable work order priority codes. The system can automatically set work order priority codes based on the work order type, service requested, location, equipment involved, or requestor preference. The system can ask for the additional questions before assigning the priority codes. The system administrator can configure email notification templates and integrate data into the email body from the service request information fields.</td>
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<td>Configuration and Display</td>
<td>Form Configuration</td>
<td>The system administrator can configure email notification templates and integrate data into the email body from the service request information fields.</td>
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<td>Configuration and Display</td>
<td>Help Screens</td>
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<td>Portal Configuration</td>
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August 2017

9 proposals received

- RFP SCORING

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<td>ASSETWORKS</td>
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<td>EBIZ MAX</td>
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<td>EBIZ TRIRIGA</td>
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<td>PLANON</td>
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WEIGHTINGS

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<td>FUNCTIONAL</td>
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<td>PRICING</td>
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15 Contributors
Sept 2017

The contenders:

IWMS  IWMS  IWMS  Point Solutions
DEMONSTRATIONS
Dec 2017

**EVALUATION RESULTS**

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<tr>
<th>VENDOR</th>
<th>1st Choice</th>
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<td></td>
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<td>total votes</td>
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28 Contributors
Dec 2017

**EVALUATION RESULTS**

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<th></th>
<th>Ease of use</th>
<th>Functional Compliance</th>
<th>Company</th>
<th>Overall Satisfaction</th>
<th>TOTALS</th>
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<td>Planon</td>
<td>806</td>
<td>744</td>
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<td>710</td>
<td>765</td>
<td>44</td>
<td>44</td>
<td>1563</td>
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16 Contributors
• TEAM PRODUCT SELECTION

■ KNOWNs

- IWMS vs Point Solutions
- Cloud vs On-Premise Solution
- Incredibly tough choice
- Several factors to consider
Team Discussion Points

• Future proof – IoT/BIM/GIS
• What does Brown FM want to be?
  **Best-in-Class!**
• Costs
• Use by other departments?
• Use of existing software tools?
  • CAD/Meridian
• About the company
  • Long term partnership
  • Ownership
Green Quadrant Integrated Workplace Management Systems 2019

MARCH 2019

BY SUSAN CLARKE
WITH RODOLPHE D’ARJUZON
Planon Implementation Project
IWMS Project Timeline

- **2015-2016**
  - Review of available products
  - Review peer solutions
  - Product demonstrations

- **2017**
  - Consultant engagement
  - Process design workshops
  - Request for Proposal (RFP)
  - RFP finalist

- **2018**
  - Project Kick-Off
  - Discovery Phase
  - Business Process Design Phase
  - Contract approved
  - Sr. Administration approval
  - Team product selection
  - On-site demonstrations
  - Solution Review
IWMS Project Timeline

- **Implementation Phase**
  - 2019:
    - 01: Training Begins
    - 02: Unit Acceptance Testing 1
    - 03: Config Review
    - 04: Future State Design
    - 05: Workday FM Time cards Go-Live
    - 06: Space Management Go-Live
    - 07: Unit Acceptance Testing 2
    - 08: Phase II Kick-Off
    - 09: Phase III Kick-Off
- **2020**:
  - 01: PLANON GO-LIVE
  - 02: Phase II Kick-Off
- **2021**:
  - 01: PLANON GO-LIVE
  - 02: Phase II Kick-Off
Planon Project Dashboard

**Planon Implementation Project**
**Project Stakeholder Dashboard**

**Project Status**
- Duration: 508d
- Start Date: 02/01/19
- End Date: 02/24/20
- % Complete: 23%

**Go Live Date**: 01/13/20
**Days Until Go Live**: 480

**Task Details**

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<th>Task Name</th>
<th>Duration</th>
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<th>End Date</th>
<th>Predecessors</th>
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<td>508d</td>
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<td>BUSINESS PROCESS DESIGN PHASE</td>
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Planon Project – Lean Training

76 staff
Current State Process Designs

Process Diagram – Key Return Process
This diagram outlines how keys are returned, inventoried, and discarded for employees.

Process Diagram – Key Ordering Process
This diagram outlines the key ordering process when key inventory needs to be replenished in the lock shop.
Planon Project – Design Retreat

Decoupling time cards; Time-Off in Workday; iPhones for Trades and Custodial staff
WorkDay Mobile App
Decouple Time Tracking

• Time card entry
• Time Off entry
Planon Project
Planning and Scheduling Design

Trade Leads
### Resource Planner - Planning and Scheduling

#### Resource Planner

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<td>Sample, David A.</td>
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#### Assigned To

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<th>Requests</th>
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Planon Project: Service Requests Obstacles

- Time Card
- Notes
- WiFi connectivity
- OSHA
- Permits
- Lockouts
- Haz Mat
- Confined Spaces
- Requires ladder
- Requires man-lift
- Two-person job
- Multi-Trade
- Shut-Downs
- Service Interruptions
- Knowledge Skills & Abilities
- Labs
- Certifications
- High Voltage
- Stores
- Inventory/Direct
- Vehicle Stock
- Satellite Stock
- Shop Stock

- Emergency/Urgent
- Staff Availability
- Data Capture
- Regulatory
- Logistics
- KSAs/Training
- Contracted Services
- Tools
- Supplies
- Materials/Parts
- Transportation & Parking
- Customer Availability
- Space Availability
- Problem Identification
- Room Scheduling

Rev 3 3/26/2019
The Value of Preventive Maintenance (PM)

PM Strategy Goals

- Prolong the useful life of equipment
- Lower operating costs associated with maintaining equipment
- Reduce utility costs and energy
- Reduce unplanned system interruptions
- “70x19”

Source: Sightlines
- Transition to Predictive Maintenance mindset
- Planon Maintenance Planner
- Stock Kit-of-Parts
Building Automation Systems

- Service Response Center Monitoring and Notifications
- Trades Staff BAS Monitoring
- Integration between Johnson Controls (JCI) and Planon
• 8,000 pieces of monitored equipment
• 110,000 monitored hardware points
• Elimination of nuisance alarms during shutdowns and PMs, etc.

Building Automation Systems
Planon Project: Service Requests Obstacles

Rev 3 3/26/2019

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Contracted Services

Tools

Supplies
Supply Chain & Logistics Management

- Stock Management
- Stock Replenishment
- Products
- Purchasing
- Storage Locations
- Mobile truck stock
- Customer Experience - Cx
Supply Chain & Logistics Management

Materials Ordering - Current Process

Request for approval - Facilities Stock Slip - Step 1
Default - FW1569510428513

Form Workflow Plus  Sep 26
to michael_flint, marco_martin...

Hello,

cindy_calabro@brown.edu has submitted a new Google Form on workflow Facilities Stock Slip
Please review the form responses then complete the approval module below:

F: 9/26/2019 11:06:59
Email Address: cindy_calabro@brown.edu
Stock Slip Number: BSR-18760
Does this need to be picked up
Supply Chain & Logistics Management

Materials Ordering - Future Process

![Materials Ordering - Future Process](image)
Event Management & Support

- University Event & Conference Services adoption of Planon
- Event Management & Support
- Greater visibility and clarity into event planning for Grounds, Custodial, Electrical, etc.
Planon Customer App

- Submit a Service Request
- Room QR Codes (27k rooms)
Planon North America Pioneers Group

Monthly Conference Calls / Shared Practices

- Dartmouth College
- Cal State Long Beach
- Cal Poly, San Luis Obispo
- Michigan State University
- Illinois Institute of Technology
- Zurich Insurance
- Brown University
Who We Are

CFTA members represent a diverse group of professionals dedicated to using FM technologies to better manage campus facilities.

The identity of the Campus FM Technology Association exists in the combined talent and experience of our members and their willingness to use their knowledge to serve one another through sharing and collaboration. The unique character of the Association lies in its focus on the development and application of the tools of technology across multiple disciplines for the planning, development, maintenance, and management of campus facilities. It is our mission to serve our members and society at large by facilitating the success of our constituents. Learn More