Access Building Assessments and Create, Update, Prioritize and Retire Opportunities

Purpose: This document will provide users the instructions necessary to access data about Buildings and create, update, prioritize and retire Opportunities.
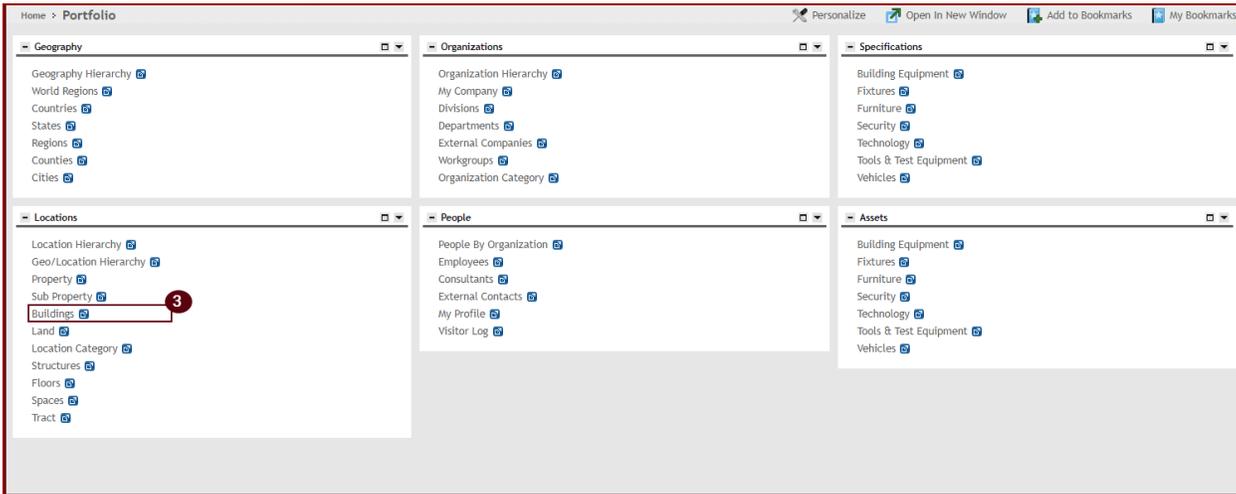
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Building Activities

Buildings need to be assessed in order to determine facilities plans. Assessments factor in building conditions and building systems.

Enter the Building Assessment Data

1. Select **Portfolio** in the main menu
2. Select **+** to the left of the **Locations** portal to expand if not expanded
3. Select **Buildings**

4. Enter text in filter box of chosen column
5. Click **Apply Filters** in the top left or click enter

6. Click on Building link under the **Buildings** column
7. Select the **Assessment** tab in the top menu
8. In the **Condition Details** section, enter the following fields (other fields are automatically calculated):
   A. **In-Service Date**
   B. **Life Expectancy**
   C. **Remaining Life**
   F. **Replacement Cost Per UOM**
   G. **Overhead Factor**
   I. **Manual Replacement Cost**
   J. **Date of Last Assessment**

The screenshot shows an Assessment tab interface with the following elements:

Tabs: General | Contact Details | Graphic | Area Measurements | **Assessment** | Maintenance | Environmental | GIS | Includes | Audit — with Activate, Save, Save & Close, x buttons.

(Optional): Assessment information for this building.

Units

* Currency: US Dollars   * Area Units: square-feet

Condition Details — Facility Assessment Analysis

Field	Value	Unit
* A. In Service Date	01/01/2010	
B. Life Expectancy (years)	0	
C. Remaining Life	90	percent
D. Calculated End of Useful Life (A+(B*(C*.01)))	01/01/2055	
Next Planned Renewal Year	2055	
2nd Planned Renewal Year	2105	
3rd Planned Renewal Year	2155	
E. Gross Area	126036.91	square-feet
F. Replacement Cost Per UOM	$414.37	US Dollars
G. Overhead Factor	0	percent
H. Calculated Replacement Cost (E*F)+(E*F*(G*.01))	$52,225,703.21	US Dollars
I. Manual Replacement Cost	$50,434,425.55	US Dollars
Date of Last Assessment		

9. The **System Repair and Replacement Funding** section, enter the following fields (other fields are automatically calculated):
   - S. **Funding Available**
   - U. **Funding Percent Required**
10. In the **Building Analysis Metrics** section, select the pulldown menus to select values for all fields listed
    - **Renewal Category**
    - **Code Deficiencies**
    - **Access Deficiencies**
    - **NRHP Status**
    - **% of Maintenance Target**
    - **% of Energy Target**
    - **Space Efficiency (ASF/GSF)**
    - **Adaptability**
    - **Campus Fit**
    - **Image & Aesthetic**
    - **Usability**
    - **Program Impact**

    Note: A majority of these metrics are entered by the SFP Module Admin.
11. In the **Building Analysis Metrics** section for **Primary RRC Org**, select the **Lookup** icon
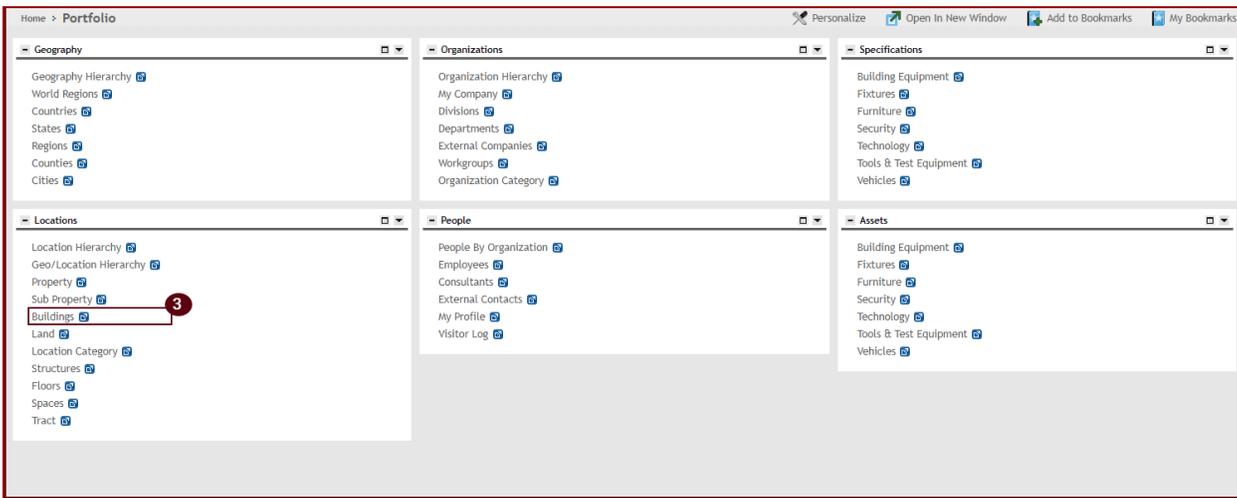12. Select the radio button to the left of the **Primary RRC Org**
13. Click **OK**
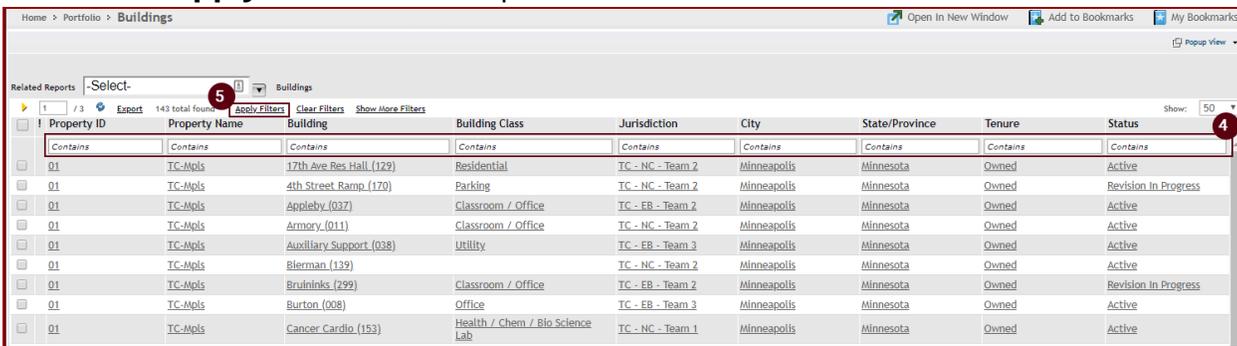14. Click the **Save** action button in the top right
15. Click the **Activate** action button in the top right
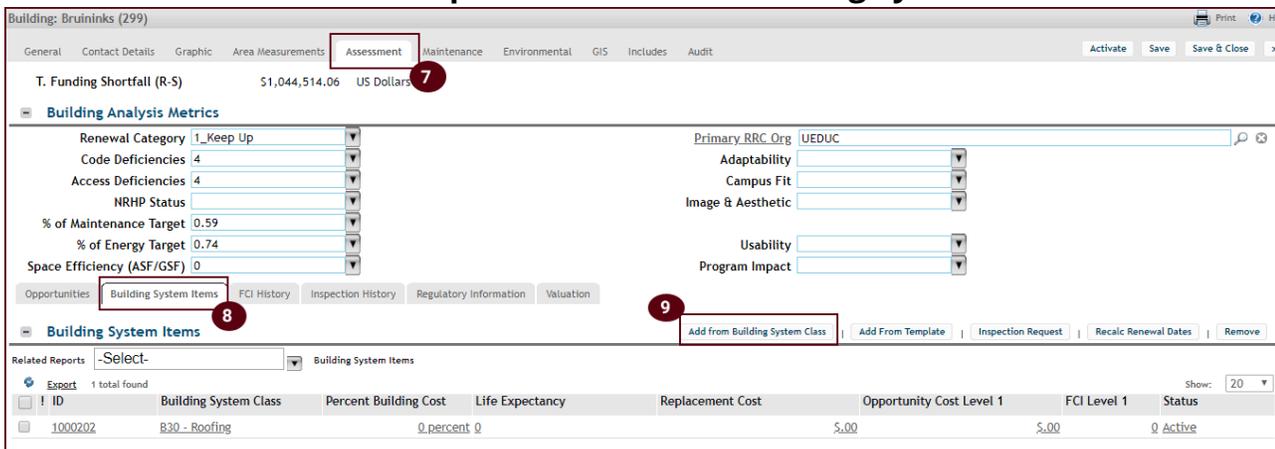
Add a Building System Item

1. Select **Portfolio** in the main menu
2. Select **+** to the left of the **Locations** portal to expand if not expanded
3. Select **Buildings**

4. Enter text in filter box of chosen column
5. Click **Apply Filters** in the top left or click enter

6. Click on Building link under the **Buildings** column
7. Select the **Assessment** tab in the top menu
8. Select the **Building System Items** tab under the **Building Analysis Metrics** section
9. Select the **Add from Template** or **Add from Building System Class** action button

10. If selecting **Add from Template**, check the checkbox titled "U of M - Default Office". This template populates all major system categories.
11. If selecting **Add from Building System Class**, check the checkbox to the left of **Building System Item(s).** This action would only be used if you wanted to add a new category or less than the full complement of major system categories.
12. Click **OK**
13. Select the link name of the newly created record to open the building system item
14. Fill out the form as needed

15. Click the **Save & Close** action button in the top right

Opportunity Activities

Opportunities are observed deficiencies in or around a building. Options of taking Opportunity action are the following: defer it to a later date, create a Project Request to have it fixed by Capital Projects or UConstruction, or create a Work Task if the Opportunity is something the tradespeople can handle.

Add an Opportunity from a Building Record

The best practice is to create the Opportunity from the Building, not create the Opportunity and then associate the Building to the Opportunity.
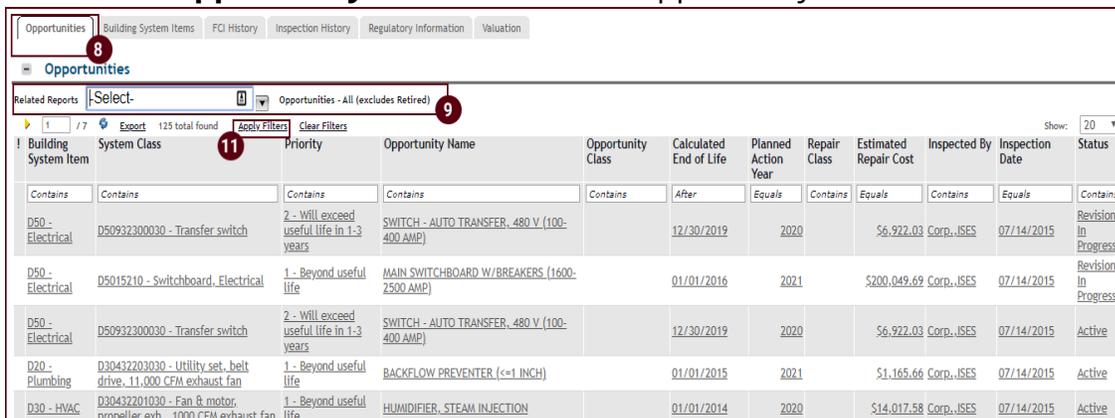1. Select **Portfolio** in the main menu
2. Select **+** to the left of the **Locations** portal to expand if not expanded
3. Select **Buildings**
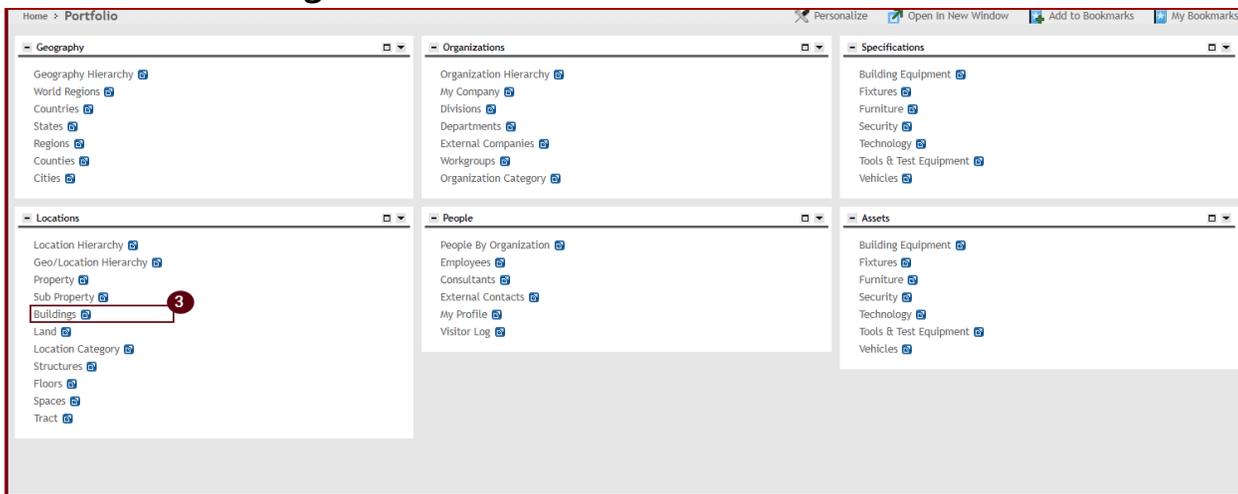
4. Type data in query field of chosen column
5. Click enter or select **Apply Filters** in the top left or click enter

6. Click on Building link under the **Buildings** column
7. Select the **Assessment** tab in the top menu
8. Under the **Building Analysis Metrics** section, select the **Opportunities** tab and confirm another Opportunity with the same request doesn't already exist with the Building
9. Click the **Add** action button to the right of **Opportunities**
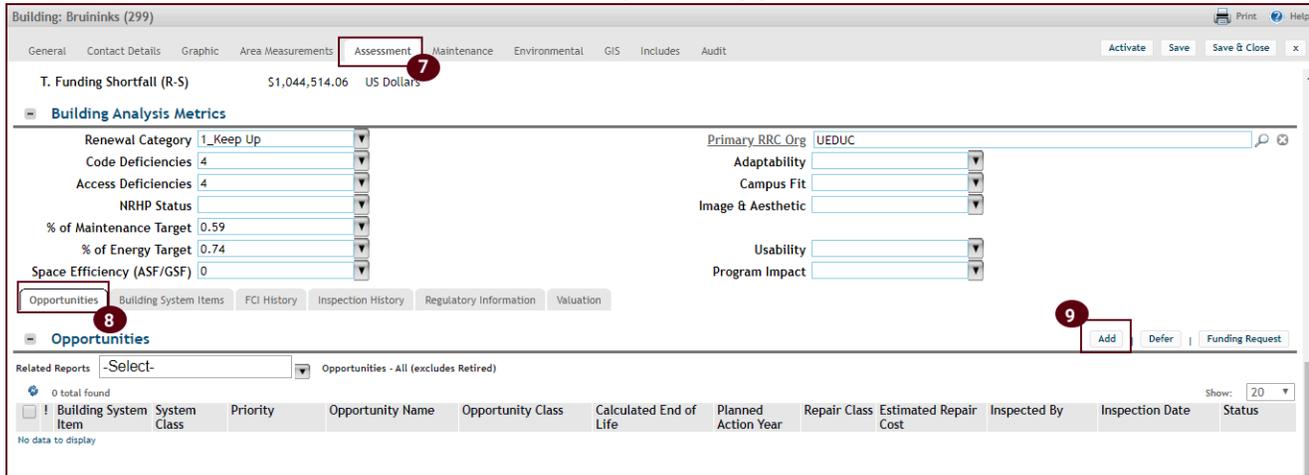
13. Fill out Opportunity form. Enter the required items and the following items:
    a. **Name**
    b. **Description**
    c. **Type**
    d. **Inspected By**
    e. **Inspection Date**
    f. **Location**
    g. **In Service Date**
    h. **Life Expectancy**
    i. **Remaining Life**
    j. **Quantity**
    k. **Cost**
14. Additionally, if the Opportunity should be prioritized for immediate consideration, fill out the following:
    a. **Proposed Funding**
    b. **Responsible Unit**
    c. **Planned Action Date**
15. Click the **Create Draft** action button of **Opportunity** window in the top right
16. Click the **Activate** action button in the top right of the Opportunity window
17. Click the **Save & Close** action button in the top right of the **Building** window.

Update an Opportunity from a Building Record

1. Select **Portfolio** in the main menu
2. Select **+** to the left of the **Locations** portal to expand
3. Select **Buildings**

4. Enter filter data in filter box of chosen column
5. Click **Apply Filters** in the top left

6. Click on Building under the **Buildings** column
7. Select the **Assessment** tab in the top menu
8. Under the **Building Analysis Metrics** section, select the **Opportunities** sub-tab
9. Select the pulldown menu in **Related Reports** to select specific Opportunity status
10. Enter Filter data under the desired filter column
11. Click **Apply Filters**
12. Click on the **Opportunity Name** under the Opportunity Name column

13. Select the **Revise** action button in the top right
14. Make updates
15. Click the **Save & Close** action button in the top right of the **Opportunity** window
16. Click the **Save & Close** action button in the top right of the **Building** window

Prioritize an Opportunity for Funding from a Building Record

1. Select **Portfolio** in the main menu
2. Select **+** to the left of the **Locations** portal to expand
3. Select **Buildings**

4. Enter filter data in filter box of chosen column
5. Click **Apply Filters** in the top left

6. Click on Building under the **Buildings** column
7. Select the **Assessment** tab in the top menu
8. Under the **Building Analysis Metrics** section, select the **Opportunities** sub-tab
9. Select the pulldown menu in **Related Reports** to select specific Opportunity status
10. Enter Filter data under the desired filter column
11. Click **Apply Filters**
12. Click on the **Opportunity Name** under the Opportunity Name column

| Opportunities | Building System Items | FCI History | Inspection History | Regulatory Information | Valuation |

8

— **Opportunities**

Related Reports | -Select- | Opportunities - All (excludes Retired)   **9**

▶ 1 / 7 🔄 Export 125 total found Apply Filters Clear Filters   **11**   Show: 20 ▼

!	Building System Item	System Class	Priority	Opportunity Name	Opportunity Class	Calculated End of Life	Planned Action Year	Repair Class	Estimated Repair Cost	Inspected By	Inspection Date	Status
	Contains	Contains	Contains	Contains	Contains	After	Equals	Contains	Equals	Contains	Equals	Contains
	D50 - Electrical	D50932300030 - Transfer switch	2 - Will exceed useful life in 1-3 years	SWITCH - AUTO TRANSFER, 480 V (100-400 AMP)		12/30/2019	2020		$6,922.03	Corp.,ISES	07/14/2015	Revision In Progress
	D50 - Electrical	D5015210 - Switchboard, Electrical	1 - Beyond useful life	MAIN SWITCHBOARD W/BREAKERS (1600-2500 AMP)		01/01/2016	2021		$200,049.69	Corp.,ISES	07/14/2015	Revision In Progress
	D50 - Electrical	D50932300030 - Transfer switch	2 - Will exceed useful life in 1-3 years	SWITCH - AUTO TRANSFER, 480 V (100-400 AMP)		12/30/2019	2020		$6,922.03	Corp.,ISES	07/14/2015	Active
	D20 - Plumbing	D30432203030 - Utility set, belt drive, 11,000 CFM exhaust fan	1 - Beyond useful life	BACKFLOW PREVENTER (<=1 INCH)		01/01/2015	2021		$1,165.66	Corp.,ISES	07/14/2015	Active
	D30 - HVAC	D30432201030 - Fan & motor, propeller exh., 1000 CFM exhaust fan	1 - Beyond useful life	HUMIDIFIER, STEAM INJECTION		01/01/2014	2020		$14,017.58	Corp.,ISES	07/14/2015	Active

13. Fill in the following fields under the **General** section:
    a. Select the dropdown arrow to the right of **Proposed Funding** and select Proposed Funding: (eg HEAPR, R&R)
    b. Select the **Lookup** icon to the right of **Responsible Unit**
        i.   Select the radio button to the left of the Responsible Unit: (eg East Bank, West Bank, etc)
        ii. Click **OK**
    c. Select the **Lookup** icon to the right of **Group (optional)**
        i.   Select the radio button to the left of the Group: (eg 2020 HEAPR, FY21 R&R, etc)
        ii. Click **OK**

14. Under the **Dates** section, select the calendar date picker to the right of **Planned Action Date** and pick a date: (eg 7/1/2020)
15. After adding information noted above, select **Save** in the top right
16. Select **Activate** in the top right. Once active, the **Planned** button will be available.

17. Select **Planned** in the top right.

18. Confirm the status of the Opportunity has moved to the status of Planned.

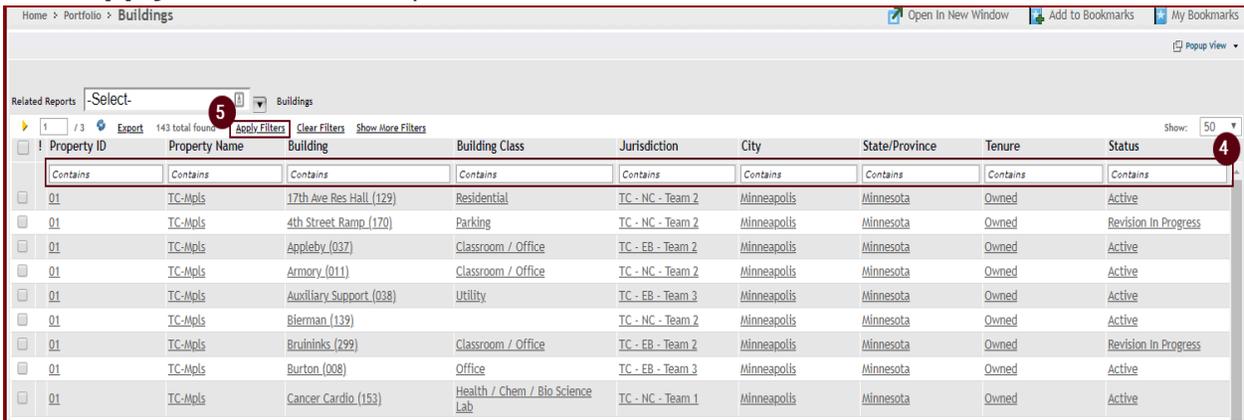
Complete an Opportunity from a Building Record

1. Select **Portfolio** in the main menu

2. Select **+** to the left of the **Locations** portal to expand
3. Select **Buildings**
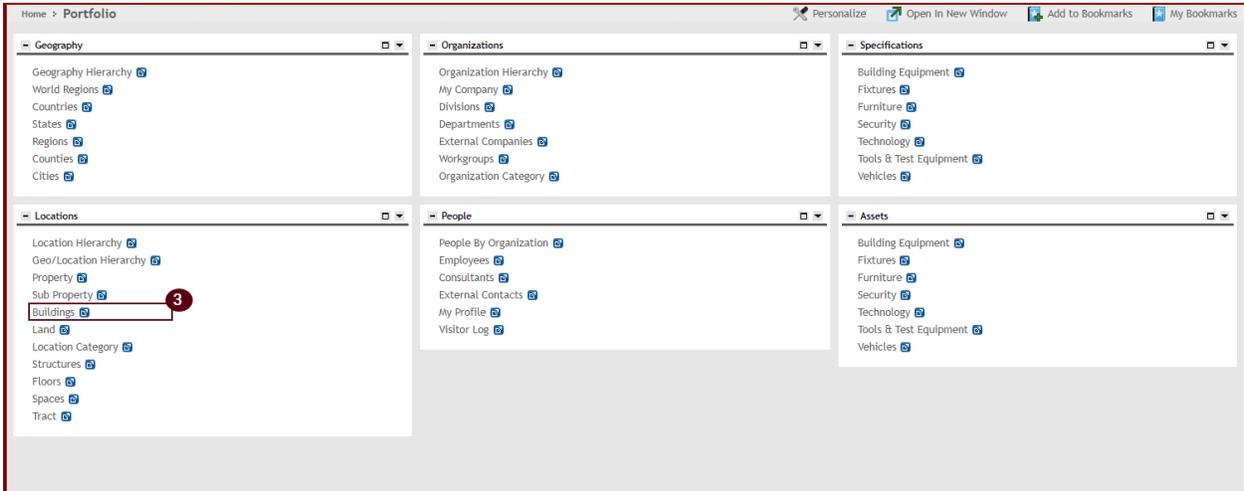
4. Enter filter data in filter box of chosen column
5. Click **Apply Filters** in the top left

6. Click on Building with under the **Buildings** column
7. Select the **Assessment** tab in the top menu
8. Under the **Building Analysis Metrics** section, select the **Opportunities** sub-tab
9. Select the pulldown menu in **Related Reports** to select specific Opportunity status
10. Enter Filter data under the desired filter column
11. Click **Apply Filters**
12. Click on the **Opportunity Name** under the Opportunity Name column
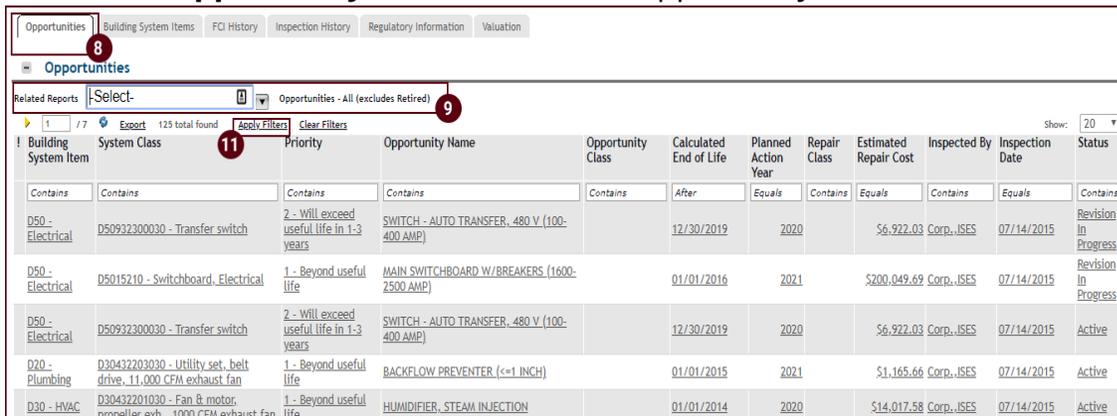
13. Click the **More** action button in the top right of the **Opportunity** window

14. Click the **Copy** action button if this is a recurring opportunity. This action will create a duplicate record associated with the same building and system. This step will save you time; instead of creating a new recurring opportunity from a blank form, the copy will inherit all of the critical fields.
15. Click the **Complete** action button in the top right of the **Opportunity** window

16. Click the **Save & Close** action button in the top right of the Building window
17. Navigate to the Opportunity copy you created in step #14.

18. Open the record
19. Under the **General** section, edit the following fields:
    a. **Name** - remove "copy of"
    b. **Inspected By** - use the "x" to delete this field and leave it blank, unless a formal inspection has been provided
    c. **Inspection Date** - use the "x" to delete this field and leave it blank, unless a formal inspection has been provided
    d. **Proposed Funding** - leave it blank, unless a proposed funding source has been identified
    e. **In Service Date** - update this field to match the date the new system or component was put in service

    f. **Planned Action Date** - update this field to match the calculated end of useful life date from above

20. Click the **Activate** action button in the top right

21. Click the **Save & Close** action button in the top right of the record to close.