

# CAFM Implementation made Simple

## A practical guide to getting your CAFM solution kick started - Part I

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### Introduction

This tutorial, starting in this issue of the DPJ and to be concluded in the next issue, will guide you through a simple phased implementation of a fully working and manageable ARCHIBUS/FM solution, inclusive of database population. Whether you currently envisage undertaking this or are just interested in what is involved you will learn a lot from such a practical approach.

A common starting point for building a manageable CAFM System is to create a solid basis for future expansion by implementing the Space Management module, this creates the AutoCAD/ARCHIBUS/database population and links that can be scaled against, without alteration.

### Justifying the need for a CAFM solution

So, after two years of deliberation and justifications, you have decided that CAFM for Space Management is going to save you 15% of facilities costs per year. A good move. Now what? Oh, we forgot about Asset Management, Planned Preventative Maintenance (PPM), Help Desk and Electronic Document Management (EDM)! Well, let's overlook these for this article, for simplicity, at the loss of saving another large percentage!!

You chose Archibus for its ability to adapt and its scalability in terms of Asset Management, PPM and Help Desk (good thinking!). Now what? Well, this tutorial is in two parts, Part 1 is to get you up and run-

ning as quickly as possible, with the least effort both in resources and management. Part 2 will discuss the expansion of the newly implemented CAFM solution, to cater for your further information requirements, which will be in the next issue of DPJ.

### Exercise 1

You need the Space Management database (by database we mean both graphical and textual information) populated. Populated means delineating all areas on AutoCAD with the Archibus overlay (you could do this in core AutoCAD, if you like - same thing, more tools) and entering the associated data via the Archibus Space Module into the Archibus database.



[Tip: BEFORE you do any of this, you need to know what data you need to get the reports you need; for now and for at least five years hence. Through your justification process, you will probably have a great idea of what you want to show - cost centre and LOB space usage, head count, desk usage and recharge analysis; so get this formatted and agreed using a CAFM consultant if required.

So, as with setting up any database, what fields do you require? As a minimum:

- Usage Code and Description
- Occupancy code
- Re-charge status
- Line of Business (LOB) code and description
- Cost Centre (CC) code and description

Let's get your CC and LOB hierarchy and coding details into electronic form and confirm it with your current HR Head. It probably wouldn't be a good idea to use a new or incorrect set of codes for the want of a bit of verification.

[Tip: The great thing about all of the above is that they can all be LOOKUP tables, hence when you type in a code, the software and database verifies it against a set of existing values and automatically pulls up the description.]

### Exercise 2

Make a CAFM Document out of the above information and get it signed off. Always a good idea. If you are uncertain exactly what information is important, getting an experienced CAFM consultant involved is a good idea. This can ensure you don't produce a report at the end of all this only to be asked "but where is the desk sharing column?".

### Exercise 3

To create content for the Archibus lookup tables, you need to know things like the space types to be used and space delineation guidelines. Print out all of your AutoCAD floor plans (see tip below!) and sit down for a day to go through them; specifying each space, usage code and

description, so creating a report (to sign-off!) and hence a structured database lookup table.

[Tip: "What? You don't have any AutoCAD plans? Your plans are out of date? You don't trust their accuracy?" A fast way to produce or update these is to bring in a professional measured surveying company (like Excitech!). They can use state-of-the-art hand-held digital recording and automated AutoCAD creation equipment to reduce cost and increase accuracy and speed, especially for CAFM use, wait a couple of days for completion, then continue to Exercise 4]

### Exercise 4

Gather your space information. Print A3 plans of each floor, dividing it into manageable sections. Each LOB administrator will annotate these according to your instructions based on the above required information. They only need to state LOB/CC and Usage code (i.e. meeting room, cellular office etc.), referencing the lists you have provided from Exercises 2 and 3.



[Tip: Head count and Desk usage information may be included when Space Mapping is complete; let's keep it SIMPLE and MANAGEABLE for the time being. There are probably many areas of contest to be worked out between the various HR and Finance databases providing the staff information - invoiced contractors for instance]

### Exercise 5

Now you are ready to physically populate the Space Database from exercise one, graphically through AutoCAD/Archibus Overlay, and alphanumerically via the Archibus Space Management module.



Use the information gathered in exercise 4 and the data defined in exercise 3 to achieve a full current database.

You may not want to spend time you don't have drawing polylines on AutoCAD/ Archibus Overlay nor enter data for weeks on end while the data gets out of date, so you could seek a good CAFM Services company (like Excitech!) to do this for you. They will provide it back in a professional portfolio and reporting format for your continued use and maintenance, as well as train you in the use of that data.

### Exercise 6

Well done, your space database is populated and producing space usage and charge-back reports. You also have your desk count, thus you can also see whether your offices are planned well, and create a benchmark for future relocations. At this stage you could start producing basic reports to show your colleagues as evidence of progress so far and to gain support for the next stages.

You will now be able to charge accurately for space, have information to progress

your expansion strategies and be able to provide a clear picture of space usage over all of your departments throughout your entire estate.

### The Next Step...

In Part 2 of this article in the next DPJ you will see how head count, staff names and assets can be used to great effect within the confines of your existing resources.

[Tip: we will also cover Remote Hosting in part 2, whereby your data integrity and accuracy is guaranteed by a team of professional CAFM staff, where reports are produced and accessed by you remotely which is your only resource expenditure]

### Excitech CAFM Services

Excitech's CAFM Services complement our CAFM software, development and support team; partnering with our customers to maximise the benefits to be achieved through Computer Aided Facilities Management.

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