



# Facility



## A SINGLE SOFTWARE PACKAGE TO MANAGE ALL YOUR REAL ESTATE AND ASSETS

- › A repository of real estate and assets (health records, surfaces, etc.).
- › Rental management of buildings and infrastructures (occupiers, lease agreements, issuance of receipts on leases, etc.).
- › Interactivity via .DWG diagrams (AutoCAD®), geographic information systems (ArcGIS®), building information models (BIM).
- › Occupier service management.
- › Curative and preventive maintenance, safety, etc.
- › Automatic integration of regulatory reports.
- › Management of service providers (contracts, guarantees, etc.).
- › After-sales service processes (customers, quotations, etc.).
- › Energy and environmental efficiency (monitoring, connected objects, etc.).
- › Built-in connectors to BAS/BMS and other systems.

# REAL ESTATE REPOSITORY

## Structure your assets

Your buildings, land and technical assets are described via interactive tree structures, linked with your photos, diagrams in .DWG format (AutoCAD), building information models (BIM) and geographic information systems. These tree structures make it easy to search, navigate and consolidate information using various criteria: geographic, technical, network, etc. By combining display modes, you can view your buildings and infrastructure on a map (ArcGIS, OpenStreetMap, etc.), and navigate inside buildings to take actions on installed technical assets directly.

Changes can be made easily by dragging and dropping. These changes are archived and dated, allowing you to see how your real estate assets were structured at any specific past date. A library of technical lots is also available.

” Your buildings and infrastructures are described by easily understandable tree structures, along with a graphical or geographic representation. ”

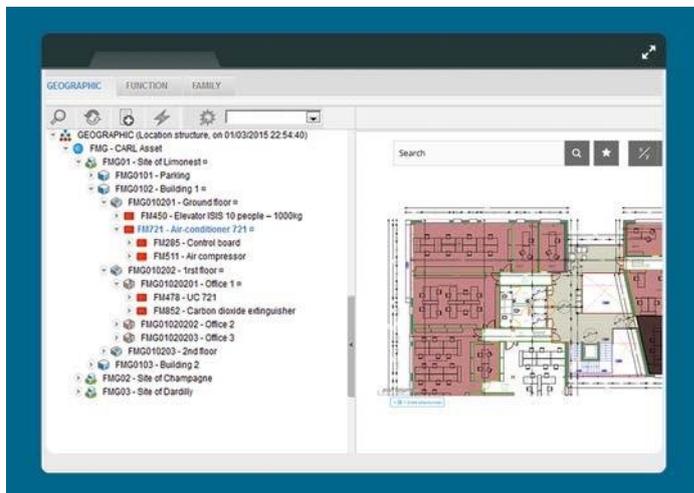
## Keep track of your real estate

Each key element of an asset (site, building, floor, room, plot, technical equipment, etc.) is described on an appropriate identity record. This includes a health record, technical characteristics, guarantees, multimedia documents, surfaces, depreciation values, plots occupied, geocoded street and address information, and so on. It also contains tracking information such as asset maintenance and diagnostic history, preventive and regulatory maintenance schedules, etc.

Occupiers are assigned to their premises, enabling occupied surface areas to be optimised. Administrative aspects of real estate management are set out and tracked, from the acquisition deed through to sale of the asset.

Rental contracts (lessor or lessee leases) are tracked, from signature and incoming inventory to issuance of receipts for rent and fees.

Energy efficiency is optimised by tracking power meters (kWh, m<sup>3</sup>, etc.) and connected objects (e.g. link between temperature and consumption of an air conditioning unit). This enables you to keep consumption levels under control and set up an energy management policy that implicates the occupiers.



The program can be linked to your BMS/BAS to automatically read values on meters or information from alarms.

Graphical modelling of your various networks (electricity, gas, telephony, etc.) makes it easy to prepare maintenance work and allows you to assess the consequences of problems on associated assets. Occupier and employee safety is also enhanced.

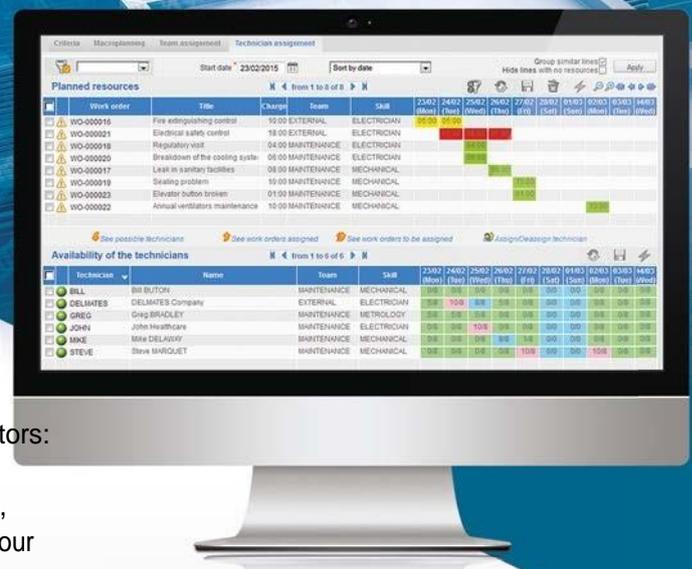
# PROCESS PURCHASES

## Manage your purchases

Users make their requests for parts and services via purchase requests. These PRs are converted into purchase orders that are then sent to vendors. Acceptance of delivered items serves as a basis for invoice verification.

Part or all of the purchasing chain can be carried out using your ERP system (SAP, Oracle Application, JDE, etc.), interfaced via the data exchange connectors proposed.

Various processes are implemented to increase efficiency: multi-vendor purchase requisitions, conversion of stock-keeping units and order units, purchases of specific items, budget overrun checks, payments, delivery disputes, vendor scoring, importing tariffs, etc.



## MANAGE AGENTS

### Manage your contractors

**CARL Source** allows you to work in various ways with contractors: purchase services as needed, take out service contracts (in relation to telephony, access control, lifts, landscaped areas, etc.) or negotiate contracts at predefined rates. By allowing your contractors controlled access to the system, you improve the clarity and quality of information. **CARL Source** provides you with everything you need to assess compliance with contractual obligations, objective performance and the profitability of service contracts.

### Engage your in-house resources

Your maintenance technicians make an active contribution to your maintenance processes (technical skills, operations performed, movements of items, time spent, etc.). The time they spend performing tasks other than maintenance (cleaning, tidying up, training, etc.) is also tracked. **CARL Source** manages maintenance technician availability, qualifications and certifications to optimise work preparation and scheduling.

### Engage your customers

The after-sales service process is handled via management of customers and quotations associated with work orders, linked to the real estate assets.

## TRACK MAINTENANCE WORK

### Perform maintenance

From a service request issued by an occupier (work request, equipment reservation) through to acceptance of finished work, the work order process adapts to your organisation, with qualification, preparation, planning, implementation and acceptance (signature) phases as appropriate.

All activities are covered: relamping, removals, refurbishment, new buildings, and more. Practical processing steps simplify operations: linked work orders, work order copies, rounds, troubleshooting, instant reports, and so on.

### Perform preventive and regulatory maintenance

Work orders for preventive and regulatory maintenance (safety, fire, gas, electricity, etc.) are copied from work order templates, using rules based on calendar dates, counters and events. Preventive maintenance scheduling can then be optimised using options such as multi-criteria triggers (for each specific asset or model), ranking of work orders, maintenance carry-over, seasonality, and so on.

Reports by official inspection organisations can be integrated automatically. They enable nonconformities to be tracked and their resolution monitored to ensure the safety of all concerned.

### Organise work order scheduling and multi-year work

The macro schedule provides an interactive (drag and drop, adjustable scale, custom display, etc.) graphical view of maintenance work. The scheduling process keeps workloads in line with resource availabilities. It becomes more and more specific as scheduled work dates approach. It first assigns work to a period of time, then to a team and finally to a specific maintenance worker.

Dynamic alerts warn planners and schedulers of work overloads, late work, inadequate certification, etc.

# KEEP TRACK OF STOCK

## Optimise your stock management

Your spare parts, consumables, tools, PPE and so on, are classified in family tree structures and linked to corresponding assets.

Each item is described in a detailed record listing its characteristics, assignment accounts, storage locations, vendor terms, and so on.

## Reduce inventory costs

Inventory movements (reservations, entries and withdrawals, transfers between warehouses, etc.) made in connection with maintenance and purchasing processes are recorded to adjust the quantities available in each warehouse. Replenishment is triggered when available quantities reach a minimum level. Reservation dates, expected delivery dates and vendor delivery dates are taken into account to ensure greater accuracy.

# COORDINATE YOUR BUSINESS

## Home portal and alerts

All users have a customisable portal (with memos, reports, favourites, indicators, plans, etc.) corresponding to their profile (building manager, occupier, contractor, in-house technical departments, etc.). This portal allows for easier navigation, access to information, and decision-making. If alert thresholds are exceeded, **CARL Source** informs you by email of any deviations.

## Analyse your business

**CARL Source** provides a complete library of print and analysis reports: business dashboards, ABC breakdown of work order costs by technical lot or building, occupier satisfaction (responsiveness, SLA, etc.), monitoring of consumption, cost per square metre, availability of premises. Wizards can be used to easily create customised reports and indicators, enabling users to extend the library. A geographic analysis of your activity and the occupancy of

your premises is proposed via speciality topics, based on the integration of data from maps and diagrams.

## Control costs

Cost control is an essential business activity. It is organised per accounting period based on the three-way accounting model: cost accounting, management audit and general accounting.



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Find out more about our references on  
our website [www.carl-software.com](http://www.carl-software.com)



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