CS325 – Umoja Real Estate Portfolio Management
## Agenda

### Course Introduction
- Module 1: Portfolio Management Overview
- Module 2: Create and Maintain Architectural Objects
- Module 3: Create and Maintain Usage Objects
- Module 4: Create Pooled Space
- Module 5: Approve Real Estate Objects
- Module 6: Functional Location and Building Components
- Module 7: Real Estate Reporting

### Course Summary

### Course Assessment

### Course Survey
Introduction

Please share with us:

• Your Name
• Your Section/Unit
• # Years with UN
• Interesting Fact About Yourself
Ground Rules

Please consider the following guidelines during the training session:

- Turn your cell phone to silent mode. Please step out of the class to take any important phone call.
- Please do not access your e-mail or the Internet outside of breaks.
- Participate fully in the training session and respect each other’s contribution.
- Breaks are included at the discretion of the trainer.
Course Overview

The purpose of the Umoja Real Estate Portfolio Management course is to explain the Umoja solution for Real Estate Portfolio Management. It will also describe how to create and maintain Architectural Objects, Usage Objects and Pooled Spaces in Umoja.

Prerequisite Review

You should have completed the following prerequisite courses:

- Umoja Overview
- Umoja Master Data and Coding Block Overview
- Umoja ECC Navigation
- Umoja Real Estate Management Overview

Course Duration: 2 days
Course Objectives

After completing this course, you will be able to:

• Explain the Umoja solution for Portfolio Management
• Describe the responsibilities of the Umoja Enterprise Roles involved in Portfolio Management
• List the elements that constitute Real Estate Master Data
• Create the Architectural Objects
• Create the Usage Objects
• Create Pooled Spaces and extract Rental Spaces
• Explain the key concepts of Functional Location and Building Component
• Approve Real Estate Objects
• View Real Estate Portfolio Management standard reports in the Umoja ECC
## Agenda

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Module 1 Objectives

After completing this module, you will be able to:

- Explain the Umoja solution for Portfolio Management
- Explain how the Umoja solution addresses the IPSAS requirements
- List the Master Data objects for Real Estate Portfolio Management
- List the high-level steps in the Portfolio Management process
Roles & Responsibilities

The following Umoja Enterprise roles are involved in the Real Estate Portfolio Management process:

- **Facilities Planner**
  - Assigns Business Partner roles
  - Creates and maintains Architectural Objects
  - Creates Usage Objects
  - Creates Pooled Spaces and extracts Rental Spaces (for leases)
  - Maintains and updates information and ensures that system records match operational property infrastructure

- **Facilities Manager**
  - Approves/activates Architectural and Usage Objects created by the Facilities Planner
  - Manages the overall portfolio
# Key Terminology

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<th>Key Term</th>
<th>Description</th>
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<td><strong>Real Estate Objects</strong></td>
<td>These are the components of Real Estate Master Data. They consist of Architectural Objects and Usage Objects.</td>
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<td><strong>Architectural View</strong></td>
<td>It provides an architectural structure that represents the physical structure of UN owned, right to use and rented real estate. It is a user-defined hierarchical structure named according to UN’s specific nomenclature for the real estate objects that it represents.</td>
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<tr>
<td><strong>Usage View</strong></td>
<td>It is the financial equivalent of the Architectural View.</td>
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<td><strong>Company Code</strong></td>
<td>It is the smallest organizational unit of external accounting for which a complete, self-contained set of accounts can be created. It includes the entry of all transactions that must be posted and the creation of all items for legal individual financial statements, such as the balance sheet and the profit and loss statement.</td>
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## Key Terminology

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<td><strong>Business Partner</strong></td>
<td>This refers to a person or an organization that has a business interest related to real estate property with UN. A Business Partner can be an owner, tenant, architect, property manager, lease administrator, staff member, consultant or other affiliate that uses UN premises to perform their activities.</td>
</tr>
<tr>
<td><strong>Functional Location</strong></td>
<td>It is an organizational unit within logistics that indicates where equipment is located or installed and where maintenance tasks are performed (buildings, floors, rooms and infrastructures)</td>
</tr>
<tr>
<td><strong>Building Components</strong></td>
<td>Are elements of a construction that typically characterize a building (walls, roof, staircase, plumbing system etc)</td>
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</table>
The Umoja solution for Real Estate Portfolio Management includes the implementation of the Umoja Flexible Real Estate (RE-FX) module.

**Core Functions:**

- Manage the portfolio of real estate infrastructure that UN utilizes across the organization
- Integrated means of managing all types of real estate properties and support all phases of the life cycle of real estate asset management
Umoja Solution for Real Estate End-to-End

End-to-end: Lease-in and Lease-out
The facilitation of a request for additional office space

1. Raise unfunded shopping cart
2. Solicitation & bidding through procurement
3. Create lease contract
4. Check fund availability
5. Create architectural object & usage object in Umoja Real Estate
6. Shopping cart funded
7. Create purchase order
8. Create lease-in contract in Umoja Real Estate
9. Landlord submit invoice
10. Service entry sheet created & approved to confirm receipt of service
11. Invoice processed
12. Payment processed
13. Update contract conditions as per invoice to monitor, report & analyze lease-in expenses

Request from an entry outside of Umoja (UNDP or City Bank) to lease space.

1. Create pooled space and extract rental space
2. Create lease-out contract in Umoja Real Estate
3. Update contract conditions as per contract provision
4. Invoice issued to bill tenant
5. Payment received & receivable cleared

v/ 14 May 2014
Umoja Solution for Portfolio Data End-to-End
Portfolio Management: Overview

Portfolio Management defines UN real estate infrastructure and provides two different views of real estate portfolios.

These views are:

- Architectural View
- Usage (Financial) View
The Architectural View provides an architectural structure that represents the physical structure of Land, Infrastructure, a Building or parts of it. It is a user-defined hierarchical structure named according to UN’s specific nomenclature for the real estate objects that it represents.

Examples of items included in Architectural View

- **Buildings**
- **Infrastructure**
- **Site**
- **Floors**
- **Rooms on a floor**
- **Land**
The hierarchy of the Architectural View can be defined with respect to attributes as shown in the diagram:

- Location *
  - Refers to the Duty Station where the Real Estate Asset is located
  - Any unique address where UN occupies space

- Site
  - Any building structure occupied by UN (owned, leased or right-to-use)

- Building
  - Building floor owned and/or occupied by UN

- Floor

- Land/Infrastructure
  - Any parcel of land occupied by UN (owned, leased or right-to-use), and any real estate object (not considered a building) within a parcel of land (Examples: helipad, bridge or treatment plant)

- Room
  - Any room such as a meeting room, IT Closet or conference room. Note that a workstation (cubicle) is also recorded as a room

* This is not a real estate object. It is only part of the hierarchy used for reporting purposes.
The Usage View represents the financial view of the real estate property and is company code (Legal Entity) dependent. The Usage View is comprised of a hierarchical structure that has the Business Entity as the top node to which can be linked subordinate objects such as Building and Land/Property. Buildings can be identified as Pooled Space, from which Rental Space can be extracted for lease-outs. All real estate objects that make up this view are financial objects. This means that both costs and revenues can be posted with reference to these real estate objects.
Relationship between Architectural Objects and Usage Objects

There is a direct relationship between the Architectural Object: Site and Usage Object: Business Entity. This is also reflected between the respective real estate objects of Land/Property and Building.

The Usage Objects (Business Entity, Building and Land/Property) are created from the existing Architectural Objects (Site, Building and Land/Infrastructure). Measurements from the Architectural Objects are copied automatically to the Usage Objects.
IPSAS and Umoja Solution

As part of Umoja implementation, the key benefits for Real Estate Management encompass the capacity to:

- Create more transparency across the organization
- Involve changes that will help meet the IPSAS requirement to disclose, capitalize, depreciate and dispose Real Estate assets

**Note:** The actual disclosure, capitalization, depreciation and disposal of Real Estate assets are managed within the Umoja modules of Finance, Asset Accounting (FA) and Sales and Distribution (SD). These assets are manually assigned to Real Estate Building or Land Usage Objects.
Master Data Objects for Real Estate

The Master Data objects for Real Estate include:

- Architectural Object
- Usage Object
- Business Partner
The Umoja solution has defined the following Architectural Objects:

- Site
- Land
- Building
- Floor
- Room
- Infrastructure

Architectural Objects are displayed in the Architectural View.
Master Data Objects: Usage Object

The Master Data that can be processed in the Usage Object are:

- Business Entity
- Land/Property
- Building
- Rental Object

Usage Objects are displayed in the Usage View.
It refers to a person or an organization that has a business interest related to UN Real Estate property.

A Business Partner can be categorized as internal (such as a staff member) or external (such as a commercial landlord, tenants and so on).

Business Partners related to Real Estate Portfolio Management processes are:

- Facilities Manager
- Facilities Planner
Business Partner Roles

Each Business Partner belongs to one group, but can be assigned one or more roles. The BP role data is module-specific, such as UN Vendor data for used with purchasing or if engaged as Consultant or Individual Contractor in the Supplier Relationship Management (SRM)-related processes and UN Customer data for the Sales and Distribution (SD) process. The roles ultimately determine how a Business Partner can be used in Umoja. Examples of business partner roles are as follows:
Business Partner Roles

A vendor is a BP role to whom UN payments is made to. This role is needed before a BP can be used to procure goods and services (including consultant services), and send payments.

- **UN Vendor** (Basic info for sending payments and setup for purchasing-transactions)
- **UN FI Vendor** (Basic info to send payments ie: a Staff Member)

A customer is a BP role from whom invoices can be issued to and payments received by the UN. This role is needed before a BP can be used for the provision of goods and services by the UN through the Umoja Sales & Distribution (SD) module, and billing and creating account receivables in the system.

- **UN Customer** (Basic info for receiving payments and set up for sales, delivery and/or billing transactions)
- **UN FI Customer** (Basic info to receive payments)
- **UN Ship to Partner** (Basic info for alternative ship-to entity associated with UN Customer)
- **UN Bill to Partner** (Basic info for alternative bill-to entity associated with UN Customer)
Multiple roles have been created for Umoja Real Estate (RE) module. These specialized roles need to be assigned to a BP before it can be used to execute RE-related transactions. There are two distinct sets of Real Estate roles, one to be assigned to leases and the other to perform RE-related transactions within the system.

- **UN Tenant w/o Customer Acct** (for internal lease-out)
- **UN Master Tenant with Customer Acct** (for external lease-out)
- **Landlord w/ Vendor Account** (for lease-in)
- **UN Contact Person**

- **UN Lease Processor**
- **UN Contract Approver**
- **UN Facilities Planner**
- **UN Facilities Manager**

**Note:** To request to create, update or block a BP Master records download the appropriate form along with the instructions to fill the request form from iSeek. Navigate to the Umoja forms directory using the path UNHQ iSeek> Umoja> Master Data Maintenance
The high-level steps in the Real Estate Portfolio Management process are as follows:

1. **Facility Planner**
   - Check Business Partner

2. **Facility Planner**
   - Create Architectural Objects – Site, Building, Land, Floor, Space

3. **Facility Planner**
   - Attach Supporting Documents, if needed

4. **Facility Manager**
   - Approve Architectural Object

5. **Facility Planner**
   - Create Usage Object - Business Entity, Building and Land

6. **Facility Planner**
   - Create Usage Object - Pooled Space

7. **Facility Planner**
   - Extract Rental Space

8. **Facility Manager**
   - Approve and Release Usage Object, Pooled Space, Rental Space
Real Estate Touch Points

The Umoja system is an integrated system and most of its modules integrate with each other to complete a process. Touch points refer to these integration points across Umoja modules, processes and activities.

- Procurement of Leases
- Procurement of different Building services
- Functional Locations
- Installation of Equipment at Functional locations
- Preventative and corrective Maintenance
- Link Usage Objects as fixed assets
Learning Checkpoint 1

Which of these views represents the physical view in Portfolio Management?

Select the correct option.

A. Architectural View
B. Usage View
C. Pooled Space View
D. All of the above
Learning Checkpoint 1

Which of these views represents the physical view in Portfolio Management?

Select the correct option.

A. Architectural View
B. Usage View
C. Pooled Space View
D. All of the above

Options A is the correct answer. The Architectural View provides the physical structure of Land, a Building or parts of it.
Learning Checkpoint 2

Which of the following Master Data objects for Real Estate are displayed in the Architectural View?

Select all that apply.

A. Floor  
B. Land  
C. Building  
D. Rental Object  
E. Pooled Space
Learning Checkpoint 2

Which of the following Master Data objects for Real Estate are displayed in the Architectural View?

Select all that apply.

A. Floor  
B. Land  
C. Building  
D. Rental Object  
E. Pooled Space

Options A, B and C are the correct answers. Infrastructure, Land and Building are Master Data objects that are displayed in the Architectural View.
Module 1 Summary

The key points covered in this module are listed below:

• The Umoja solution for Real Estate Portfolio Management includes the implementation of the Umoja Flexible Real Estate (RE-FX) module

• Portfolio Management provides two different views, the Architectural View (physical view) and the Usage View (financial view) of real estate portfolios

• The Master Data elements used within Real Estate Portfolio Management are: Architectural Object, Usage Object and Business Partner
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Module 2 Objectives

After completing this module, you will be able to:

• Identify the steps involved in creating/maintaining Architectural Objects
• Create Architectural Objects
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<td>It refers to any building structure occupied by UN (owned, leased or right-to-use).</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>It refers to a real estate object (not considered a building) within a parcel of land. A helipad, cooling distribution system and security barriers are all considered infrastructure.</td>
</tr>
<tr>
<td>Location</td>
<td>It refers to the Duty Station where the Real Estate Asset is Located.</td>
</tr>
<tr>
<td>Sector</td>
<td>It refers to the sector of the Duty Station where the Real Estate Asset is located. Sector is applicable only to Duty Stations that are subdivided in this way as, for example, in field missions.</td>
</tr>
<tr>
<td>Site</td>
<td>It refers to a building or a group of buildings and infrastructure assets that have a common address. The Site is the main object to which all other objects are associated.</td>
</tr>
<tr>
<td>Land</td>
<td>It refers to any parcel of property occupied by UN, be it owned, leased or occupied on a right-to-use basis.</td>
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<td>Floor</td>
<td>It refers to a building floor owned and/or occupied by UN.</td>
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<td>Room</td>
<td>It refers to rooms with any functionality (office, meeting room, conference room and so on) within a floor, well as each cubicle in an open space. A desk assigned as a working unit to a staff member is also considered a room. A closed office occupied by more than one person must be entered as multiple rooms.</td>
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<tr>
<td>Lease-in</td>
<td>This lease type is used when the space is leased from an external party and is used by UN for its own use. This lease type represents UN as the Tenant.</td>
</tr>
<tr>
<td>Lease-out</td>
<td>This lease type is used when UN is leasing space (owned or not owned by UN) to a third party, such as another UN agency, host government, commercial entity, NGO or other organization.</td>
</tr>
<tr>
<td>Pooled Space</td>
<td>It refers to a flexible object that can be leased out either as whole or divided into rental spaces. Pooled space cannot be leased out in their own right.</td>
</tr>
<tr>
<td>Rental Space</td>
<td>It refers to a flexible object that is a space extracted from a pooled space mainly for the purpose of leasing out.</td>
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<tr>
<td>Key Term</td>
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<td>Business Entity</td>
<td>It is a group of individual real estate objects which are part of the same company code, are owned/leased by the same owner (that is, UN) and/or are managed together. The business entity is created automatically as an internal controlling object. In other words, a business entity is also an account assignment object.</td>
</tr>
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</table>
Create & Maintain Architectural Objects

The Facilities Planner is responsible for creating and maintaining the Architectural Objects. Each Architectural Object is approved by the Facilities Manager.

The high-level steps in creating and maintaining the Architectural Objects are as follows:
The Facilities Planner checks if the Business Partner associated with the Architectural Object exists in the system.

- If the Business Partner does not exist, they will need to be created in the Business Partner Master Data
- If the Business Partner exists, the Business Partner Role is assigned to the Business Partner based on the duties performed
- In Umoja Portfolio Management, Business Partners are staff members who are assigned to the role of Facility Planners or Managers

**Note:** The action of checking for a Business Partner is to ensure that the Facilities Manager and/or Planner associated with the creation and management of an Architectural Object, exists (and is active) within Umoja.
The steps for searching a Business Partner in the Umoja system are:

1. Enter the T-code RE80 in the Command field
2. Click the Enter icon

You can also access this transaction using the SAP menu path: Accounting > Flexible Real Estate Management > Master Data > RE Navigator.
Check Business Partner

The **RE-Navigator** screen appears.

1. Select **Partner** from the drop-down
2. Click the **Find** icon to search for a Business Partner

**Note**: The drop-down menu provides a way to search for Business Partners while working in the **RE Navigator** screen.
The **Business Partner Number** screen appears.

5️⃣ Click the icon in the **BP Role** field to select a Business Partner role.
The **BP Role Entries** window displays the list of entries for BP Role.

6. Select either **UN Facilities Planner** or **UN Facilities Manager**. In this example, select Z00052 | UN Facilities Planner

7. Click the **Continue** icon

**Note**: You will have to perform this activity twice for both roles, as both Facilities Manager and Planner must be valid and active BP’s in this list.
The BP Role code **Z00052** for UN Facilities Planner populates in the **BP Role** field.

8. Click the **Continue** icon

**Note:** It is advised to search by last name or first name to further refine search results.
The search results for your specified criteria displays.

9. Verify that the required Facilities Planner or Manager displays in the search results
Check Business Partner

A summary of the steps for checking a Business Partner is as follows:

- Search for a Business Partner using the T-code **RE80**
- Select **Partner** from the drop-down in RE-Navigator screen and then click the **Find** icon to search for a Business Partner
- Select the BP Role of **UN Facilities Planner** or **UN Facilities Manager**
- Once search results display, verify that **UN Facilities Planner** or **UN Facilities Manager** (Business Partner) you are verifying exists in Umoja with the required Umoja Enterprise Role
- If the Business Partner is not available in BP search results, submit a request to the Finance team to create the Business Partner in Umoja (Master Data)

**Note:** It is advised to always check for a Business Partner before creating Architectural Objects. However, if the existence of a Business Partner has been previously validated, a check is not required.
Architectural Object: Create a Site

The following steps will cover the creation of an Architectural Object: **Site**.

Refers to a building or a group of buildings and infrastructure assets that have a common address.
In creating an Architectural Object (AO), such as **Site**, we will be utilizing the following tabs within the Real Estate (RE) Navigator:

1. **General Data** tab: Enter key information about the AO, such as validity date, address, Authorization Group and User Status
2. **Additional Data** tab: Enter information related to the location managing the entity, and ownership situation of the site
3. **Partners** tab: Enter information about the Facilities Planner and Manager associated to this AO object
4. **Measurements** tab: Enter AO object measurements in appropriate dimensions and formats
Create Architectural Objects

The Facilities Planner creates the architectural hierarchy.

Let’s learn about the creation of Architectural Object, Site, in Umoja.

The steps to create a Site are:

1. Enter the T-code RE80 in the Command field
2. Click the Enter icon

You can also access this transaction using the SAP menu path: Accounting > Flexible Real Estate Management > Master Data > RE Navigator.
Create Architectural Objects

The **RE Navigator** screen appears.

3. Select **Architectural Object** from the drop-down menu of the Navigation area

4. Click the **Create** icon
The **Create Architectural Object** window appears.

1. **Populate the Arch. Object Type field for Site**
2. **Click the Continue icon**

**Note:** The **Arch. Object Type** field is populated with the type of real estate element you are creating for this particular level of the Architectural View. Choosing the correct type of Architectural Object is critical in order to create an accurate hierarchy between Architectural Objects and its appropriate relationship with Usage Objects.
Create Architectural Objects

7. Identify the type of Architectural Object that you are creating. In this example, select **Site**

8. Click the **Continue** icon
Create Architectural Objects

- Click the **General Data** tab
- Populate the **Name of Arch. Object, Short description** and **Valid From** and **To** fields
- Populate the **Authorization Group** field
- Click the **Create New Address** icon and populate the address in the **Create Address for Object AO** pop-up window

**Note:** The **Authorization Group** is a security parameter in RE-FX that identifies which group or location maintains an Architectural Object.
Create Architectural Objects

13. Click the **Additional Data** tab
14. Populate the **Location** field
15. Populate the **Maintenance distr.** field.

**Note**: The **Location** field specifies the Umoja entity which manages the object.

The **Maintenance distr.** field enables you to identify the ownership situation of the building. Architectural Objects that are leased will have defined IPSAS classifications. Those which are owned will have ownership classifications (based on the options available in the field).
Click the **Partners** tab

Click the **Assign New Partner** icon and select **UN Facilities Planner** item

**Note**: In this tab, you must identify both, UN Facilities Manager and UN Facilities Planner. You cannot save an Architectural Object without identifying a UN Facilities Planner. However, you cannot have an Architectural Object approved without identifying both.

You may have more than one UN Facilities Planner & Manager involved in creating an Architectural Object.
Create Architectural Objects

Check Business Partner

Create Architectural Objects—Site, Building, Land, Floor, Room

Attach Supporting Documents, if needed

Approve Architectural Objects

The **Business Partner Search** pop-up window appears.

1. Populate the last name and/or first name to search for the individual in the **Name 1/LastName** and **Name2/FirstName** fields.
2. Click the **Continue** icon.

In the results list, click the partner and then click the **Continue** icon.

**Note:** in the training environment the Phonetic Search could be disabled. In this case de-select the Phonetic Search capability from the Business Partner Search.
Create Architectural Objects

1. Click the **Measurements** tab
2. Choose a measurement type from the **MeasType** field
3. Populate the **Amount** field
4. Enter the measurement validity period in the **Meas. Valid From** and **Meas. Valid To** fields
5. Click the **Check** icon

**Note**: It is advised to click the **Check** icon to validate that there are no errors. This functionality checks the Architectural Object for errors and gives you a message in the bottom left hand corner.
Create Architectural Objects

25. Click the **General Data** tab
26. Click the **Change User Status** icon

**Note:** We are returning to the **General Data** tab to update the **User Status** field, as we are now ready to submit the Architectural Object for approval by the Facilities Manager. It is advised not to carry out this step until all other tabs have been properly populated.
Create Architectural Objects

The **Set User Status** window appears.

- Select the **02 REQS Approval Requested** radio button
- Click the **Continue** icon

**Note**: The AOID Number must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
Create Architectural Objects

In the **Architect. Object Site <INIT> Create: General Data** screen:

1. **Select the Save button**
   - A system a message at the bottom of the screen will be confirm that the AO was successfully created and indicate the ID number of the new Architectural Object

**Note:** The AOID Number must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
Follow these steps to send an e-mail message to the Facility Manager requesting to approve the new Architectural Object:

31. Click the **Services for Object** button

32. Click the **Send Object with Note** button on the pop-up out menu
Type a text note in the note box

Type the Facility Manager's e-mail address in the **Recipient** field

Click the **Send** button

The system will generate an e-mail message and send to the recipient with a subject heading “Architect. Object xxxxxx”. Your text note will appear in the body of the e-mail.
Umoja Hands-on

✓ Verify Business Partner Master Data
✓ Create an Architectural Object: Site
Architectural Object: Create a Building

The following steps will cover the creation of an Architectural Object: **Building**.

Any building structure occupied by UN (owned, leased or right-to-use)

- Location
- Site
- Building
- Land/Infrastructure
- Floor
  - Room
  - Room
Create Architectural Objects

The steps to create a Building are:

1. Select **Architectural Object** in the drop-down portion of the Navigation area on the left-hand side of the screen
2. Click the **Create** icon

**Note:** The drop-down menu where **Architectural Object** is selected from, is the starting point for creating, finding and viewing several other types of Architectural and Usage Objects. We will revisit this dropdown menu as the course progresses.
Create Architectural Objects

The **Create Architectural Object** window appears.

1. **Populate the Arch. Object Type field for Building**
2. **Click the Continue icon**

**Note:** The field **Arch. Object Type** describes the type of Architectural Object you are creating. For example, in this field you would select an Architectural Object such as Site, Building, Land and Infrastructure.
Create Architectural Objects

5. Identify the type of Architectural Object that you are creating. In this example, select Building.

6. Click the Continue icon.
The steps to associate the building to the site you previously created are as follows:

1. Click the **Assign Higher Level Object List** icon
2. Select the **Selection by Hierarchy** radio button
3. Enter the Architectural Object ID for the Site you previously created in the **Arch.Obj. ID** field and click the **Continue** icon

**Note:** By selecting the Site in the Higher-Level Object field, you are associating the Building to the Site you previously created, based on its hierarchical relationship.
Create Architectural Objects

10. Click the **General Data** tab

11. Populate the **Name of Arch. Object** field

12. Select the building function from the **Function** field dropdown menu
Create Architectural Objects

Populate the Valid From and To fields

Populate the Authorization Group field

**Note:** The Valid From and To field defines the validity period of the Architectural Object you are creating. Valid From corresponds to the EOD (entry on duty) date/ready for occupancy when it is owned. Valid To is when the object is no longer managed by the Umoja entity (that is scrap, change in ownership, return to member state, etc.)

For objects (such as, MOU’s) that do not have an expiration date, you may enter 31/12/9999.
Click the **Additional Data** tab

Populate the **Location** field

Select the **Maintenance Distr.**

Form the dropdown menu

**Note:** The **Location** field specifies the Umoja entity which manages the object.

The **Maintenance distr.** field enables you to identify the ownership situation of the building. Architectural Objects that are leased will have defined IPSAS classifications. Those which are owned will have ownership classifications (based on the options available in the field).
Create Architectural Objects

18. Click the Buildings tab
19. Populate the Number of floors field

Note: The Basements, Top Floor and Elevator to Floor fields are optional. However, their inclusion should reflect the number entered in the Number of Floors field.
Create Architectural Objects

Note: In this tab, you must identify both, UN Facilities Manager and UN Facilities Planner. You cannot save an Architectural Object without identifying UN Facilities Planner. Also, you cannot have an Architectural Object approved without identifying both.
Create Architectural Objects

22. Click the **Measurements** tab
23. Choose a measurement type in the **MeasTp** field
24. Populate the **Amount** field
25. Enter the measurement validity period in the **MeasFrom** and **MeasTo** fields
26. Go back to the **General Data** tab
Click the **Change User Status** icon

**Note:** We are returning to the **General Data** tab to update the **User Status** field, as we are now ready to submit the Architectural Object for approval by the Facilities Manager. It is advised not to carry out this step until all other tabs have been properly populated.
Create Architectural Objects

The **Set User Status** window appears.

28. Select the **02 REQS Approval Requested** radio button
29. Click the **Continue** icon

**Note**: The AOID Number must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
Click the **Check** icon

Click the **Save** icon

**Note**: The status bar displays a message indicating that no errors were found. When the **Save** icon is clicked, the AOID (Architectural Object ID) is displayed. The AOID Number must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
The **Do you really want to save** pop-up displays.

32 Click the **Update Immediately** button

**Note**: If you select the **Add to Worklist** button, the measurements must be updated before you submit the Architectural Object for approval.

Alternatively, if you select the **Update Immediately** button, the measurements provided will be immediately incorporated. In addition to the Architectural Object’s measurements being incorporated, they will be referenced by the higher-level Architectural Object (for informational purposes only).
Do you Really Want to Save? – Functionality Explained

Each Architectural Object updates the measurements of the Architectural object above it, based on the Architectural View hierarchy. Suppose the Architectural Object: Site was identified with measurements of 10,000 square feet.

Initial **Building** Measurements: 5,000 Sq. Feet

*Subordinate Architectural Objects Entered As:* 3,000 Sq Feet (three floors @ 1,000 Sq.ft)

Building’s Square Footage will be updated)

Site = 10,000 Feet

**Note:** If the area of the larger, over-arching Real Estate Object (example: building) is not manually entered, it will be determined by the summed up total of all its subordinate Architectural Objects (example: floor).
If an Architectural Object was created in error, or is rejected by the Facilities Manager:

- The **Valid From** date and **Valid To** date (within the **General Data** tab) must be updated to today’s date, thereby making it an inactive Architectural Object.
- Obsolete Architectural Objects will not be immediately removed from Umoja, for recordkeeping and auditing purposes.
- If necessary, a new Usage Object must be created, with a **Valid To** date effective from today’s date.

**Note:** The AOID Number of the new Architectural Object must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
This is an optional step and is used by the Facilities Planner to attach relevant documents to the related Real Estate object.

The steps to attach documents are standardized in Umoja, as all attachments are centrally managed via the Umoja Document Management Tool.

**Note:** The steps to attached document in Umoja are detailed in a Job Aids posted on iseeK. A dedicated Job-Aid to attach document in Real Estate will be published soon.
Umoja Hands-on

✓ Create an Architectural Object: Building

✓ Create Architectural Objects: Floors

✓ Create Architectural Objects: Rooms

✓ Create an Architectural Objects: Infrastructure
Simulation Activities

Throughout this training, users will have the opportunity to conduct activities in the form of simulations. Simulations are interactive “recordings” of the Umoja system used to help facilitate a hands-on learning experience. The simulation links are provided on the corresponding activity slides.

Users can access simulations in three different modes:

- **Show me**: Users view a video of an entire transaction being conducted
- **Let’s do it together**: Users will be prompted to input data at key points during the transaction (recommended)
- **Try it**: Users can complete an entire transaction on their own, with no additional instructions provided
Activity 1

**Transaction Name:** Create an Architectural Object-Floor

**Transaction Code:** RE80

**Link to the uPerform simulation:**
http://unsapuperform.umoja.un.org/gm/folder-1.11.2871?mode=EU&originalContext=1.11.2555
Activity 2

Transaction Name: Change an Architectural Object

Transaction Code: RE80

Link to the uPerform simulation: [http://unsapuperform.umoja.un.org/gm/folder-1.11.2875?mode=EU&originalContext=1.11.2555](http://unsapuperform.umoja.un.org/gm/folder-1.11.2875?mode=EU&originalContext=1.11.2555)
Learning Checkpoint 1

The ____________ is responsible for creating and maintaining the Architectural Objects.

*Fill in the blank with the correct option.*

A. Facilities Planner
B. Facilities Manager
C. Architect
D. Asset Accountant
Learning Checkpoint 1

The ______________ is responsible for creating and maintaining the Architectural Objects.

*Fill in the blank with the correct option.*

A. Facilities Planner  
B. Facilities Manager  
C. Architect  
D. Asset Accountant

Option A is the correct answer. The Facilities Planner is responsible for creating and maintaining the Architectural Objects.
Learning Checkpoint 2

Which of the following statements is not correct?

Select the correct option.

A. A Building is associated to a higher level object (Site)
B. To save a newly created Architectural Object, you must add a Facilities Planner and Facilities Manager
C. Authorization Group is a mandatory field when creating an Architectural Object
D. When you click the Check Icon, the status bar displays a message indicating whether error can be found
Learning Checkpoint 2

Which of the following statements is not correct?

Select the correct option.

A. A Building is associated to a higher level object (Site)
B. To save a newly created Architectural Object, you must add a Facilities Planner and Facilities Manager
C. Authorization Group is a mandatory field when creating an Architectural Object
D. When you click the Check Icon, the status bar displays a message indicating whether error can be found

Option B is the correct answer. In order to save an Architectural Object, you do **not** have to add a Facilities Planner and Facilities Manager.
Module 2 Summary

The key points covered in this module are listed below:

• The Facilities Planner is responsible for creating and maintaining the Architectural Objects

• In order to create an Architectural View, you will begin by creating the Architectural Object: Site

• Subordinate objects of Building, Land, Floor, Room and Infrastructure are all created by associating them to the high level objects

• The Facilities Planner must set the architectural object to REQS Approval Requested status in order to make it available for approval by the Facilities Manager
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<td>Course Assessment</td>
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<td>Course Survey</td>
</tr>
</tbody>
</table>
Module 3 Objectives

After completing this module, you will be able to:

• Identify the steps involved in the creating and maintaining Usage Objects from Architectural Objects

• Create a Usage Object for a Business Entity, Building and Land/Property
Creation of Usage Objects

After the Architectural Objects are created, the Facilities Planner creates the Usage Object in order to add the financial attributes of the Architectural Objects.

The high-level steps in creating and maintaining the Usage Object are as follows:

First, the Usage Object for the Business Entity, Building and Land/Property is created. Then, the Usage Object for Pooled Spaces is created.
Usage Object: Create Business Entity

The following steps will cover the creation of an Usage Object: **Business Entity**.
In creating Usage Object (UO), such as Business Entity, we will be utilizing the following tabs within the Real Estate (RE) Navigator:

1. **General Data** tab: Enter key information about the UO, such as validity date (Valid From date is used as Entry of Duty date), address, authorization Group and User Status.

2. **Measurements** tab: Enter UO object measurements in appropriate dimensions and formats. This information is inherited from the AO.

3. **Posting Parameters** tab: Enter financial information related to the UO, such as Business Area, Funds Center and whether or not this UO is Grant-Funded.
The Facilities Planner creates the Business Entity, Building and Land from the respective Architectural Objects within the Company Code.

The Business Entity contains the financial information related to the Architectural Site.

Let’s learn about the creation of Usage Objects for a Business Entity in Umoja.

The steps to create a Business Entity are:

1. Enter the T-code **RE80** in the **Command** field
2. Click the **Enter** icon
The **RE Navigator** screen appears.

3. Select **Business Entity** from the drop down portion of the Navigation area

4. Click the **Create** icon

**Note:** The drop-down menu where **Business Entity** is selected from is the starting point for creating, finding and viewing several other types of Architectural and Usage Objects. We will revisit this dropdown menu as the course progresses.
Create Usage Objects: Business Entity, Building and Land

The **Create Business Entity** pop-up window appears.

5. Select the **Create from Architecture** check box
6. Populate the corresponding/source Arch.Obj. ID
7. If not defaulted, populate the **Company Code field** to 1000
8. Click the **Continue** icon
Click the **General Data** tab

Confirm or update the **Name of BE**

Populate **Valid From** and **To** fields. The **Valid From** and **Valid To** dates defines the validity of the Usage Object you are creating

**Note:** The **Valid From** and **To** field is associated with the start and end of Lease-in or Lease-out associated to the object. For objects (such as, MOU’s) that do not have an expiration date, you may enter 31/12/9999
Click the **Measurements** tab and confirm the measurements and the validity (**MeasFrom/To**) inherited from the Site AO.

**Note**: By default, the **Measurements** tab, inherited values from Architectural Object are shown.
Click the **Posting Parameters** tab

In the **Posting Parameters** tab, populate the following fields:

- **Business Area**: It is the financial coding identifier for the entity
- **Profit Center**: It is an attribute of cost objects (Cost Center, Internal Order or WBSE) that allows reporting of costs by organizational function (for example, Medical, Engineering or IT)

**Note**: Posting Parameters on a Usage Object are used for posting revenue when it is associated with a lease-out contract. Posting Parameters confirm the link between cost center assignments and funds
Create Usage Objects: Business Entity, Building and Land

- **Fund**: A Master Data element used to identify the source and use of funding from voluntary contributions.
- **Budget Period**: A Master Data element used to differentiate budget execution of one fund during the period of available budget authority (one year, multiple years, unlimited).
- **Funds Center**: An organizational unit within the Funds Management (FM) module that controls a budget. It is time dependent and has the valid from and to dates. Every Funds Center corresponds to a Cost Center.

**Note**: An invalid link between in the Cost Center assignments and the Funds could result in a posting parameters error.
Create Usage Objects: Business Entity, Building and Land

- **Functional Area**: A Master Data element that is maintained within the FM module. It is also used in Finance (FI) and Controlling (CO) to classify revenues and expenditures of an organization by function.

- **Grant**: The grant number, if the funds come from a grant. If there is no grant, then use **GMNR**.
Click the **General Data** tab

Click the **Change User Status** icon

**Note:** We are returning to the **General Data** tab to update the **User Status** field, as we are now ready to submit the Usage Object for approval by the Facilities Manager. It is advised not to carry out this step until all other tabs have been properly populated.
The **Set User Status** window appears.

17. Select the **02 REQS Approval Requested** radio button

18. Click the **Continue** icon

**Note:** The UOID Number must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
Click the **Check** icon. This functionality checks the (Architectural Object/Usage Object) entry for errors and gives you a message on the bottom left hand corner.

**Click the **Save** icon to save the record**
Create Usage Objects: Business Entity, Building and Land

The Business entity is created with all data entered in previous steps and Business Entity number assigned.

**Note:** The Status Bar displays a message indicating that no errors were found. When the **Save** icon is clicked, the UOID (Usage Object ID) is displayed. The UOID Number must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
Umoja Hands-on

✓ Create a Usage Object: Business Entity
Usage Object: Create Building

The following steps will cover the creation of an Usage Object: **Building**.

---

Architectural View

- **Site**
  - **Building**
    - **Floor**
      - **Room**
  - **Land/Infrastructure**

Usage View

- **Company Code**
  - **Business Entity**
    - **Building**
      - **Pooled Space**
      - **Rental Space**
    - **Land/Property**
In creating Usage Object (UO), such as a **Building or Land/Infrastructure**, we will be utilizing the following tabs within the Real Estate (RE) Navigator:

1. **General Data** tab: Enter key information about the UO, such as validity date (Valid From date is used as Entry of Duty date), address, authorization Group and User Status
2. **Value** Tab (available for Building and Land UOs): Enter Asset related information, such as the value and End of the Useful Life
3. **Measurements** tab: Enter UO object measurements in appropriate dimensions and formats. This information is inherited from the AO
4. **Posting Parameters** tab: Enter financial information related to the UO, such as Business Area, Funds Center and whether or not this UO is Grant-Funded
5. **Assignments** tab: Enter details related to whether or not the UO is a Fixed Asset under IPSAS
The steps to create a Usage Object: Building are as follows:

1. Select **Building** in the drop down portion of the Navigation area
2. Click the **Create** icon
The **Create Building** pop-up window appears.

3. Select the **Create from Architecture** check box

4. Populate the corresponding/source **Arch.Obj. ID (Building AOID)**

5. Click the **Continue** icon

**Note**: The **Arch.Obj.ID** entered here is for the Architectural Object: Building.

The numerical format for Architectural Object IDs is based on the Architectural View hierarchy. For example, a building with one floor would be represented as: **<Building number.floor number>**.
Select the **General Data** tab

Confirm or update the **Name of BU** field

Populate **Valid From** and **Valid To** fields. The **Valid From** and **Valid To** dates refer to the validity of the Usage Object. In creating a Lease-in or Lease-out, it is associated to the start and end dates of the lease contract

**Note:** **Authorization Group** field and **Address** field is pre-populated based on the information entered while creating the Architectural
Click the **Value** tab

Populate the **Building Value**

**Date of valuation (Modernization)** – optional, defaulted to 1 January 2014

Populate the **End of Usage** (End of the Useful Life)

---

**Note:** The values is required for owned buildings only regardless of the threshold. The value inserted in the Value folder will be used to calculate the depreciation and capitalized value of the related Asset.
When enriching information in connection with a UO **Land** enter the following information:

10. **Land Value** (Total Value NOT USD/M2)
11. **Date of valuation** (Land Value Date)
12. **Plan Dated** (End of the Useful Life)

**Value**

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Value</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land value</td>
<td></td>
<td>USD/M2</td>
</tr>
<tr>
<td>Land date</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**End of Useful Life**

<table>
<thead>
<tr>
<th>Field</th>
<th>Required Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development plan</td>
<td></td>
</tr>
<tr>
<td>Plan dated</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** The values is required for owned Property/Land only regardless of the threshold. The values inserted in the Value folder will be used to calculate the depreciation and capitalized value of the related Asset.
Create Usage Objects: Business Entity, Building and Land

13. Click the **Measurements** tab
14. Choose a measurement type in the **MeasTp** field
15. Populate the **Amount** field
16. Enter the measurement validity period in the **MeasFrom** and **MeasTo** fields

**Note:** Measurements are inherited from the Architectural Object associated to this Usage Object.
Click the **Posting Parameters** tab

In the **Posting Parameters** tab, populate the following fields:

- **Business Area**: It is the financial coding identifier for the entity
- **Profit Center**: It is an attribute of cost objects (Cost Center, Internal Order or WBSE) that allows reporting of costs by organizational function (for example, Medical, Engineering or IT)

**Note**: Posting Parameters on a Usage Object are used for posting revenue when it is associated with a lease-out contract.
• **Fund**: A Master Data element used to identify the source and use of funding from voluntary contributions

• **Budget Period**: A Master Data element used to differentiate budget execution of one fund during the period of available budget authority (one year, multiple years, unlimited)

• **Funds Center**: An organizational unit within the Funds Management (FM) module that controls a budget. It is time dependent and has the valid from and to dates. Every Funds Center corresponds to a Cost Center

**Note**: An invalid link between in the Cost Center assignments and the Funds could result in a posting parameters error.
• **Functional Area**: A Master Data element that is maintained within the FM module. It is also used in Finance (FI) and Controlling (CO) to classify revenues and expenditures of an organization by function.

• **Grant**: The grant number, if the funds come from a grant. If there is no grant, then use GMNR.
The steps for assigning an asset record to a Usage Object (based on defined IPSAS Requirements) are:

19. Click the **Assignments** tab
20. Adjacent to the **Assign** icon, click the downward arrow and select the **Assets** option. The **Assets** tab will display on the bottom of the screen
21. Populate the **Company Code** to **1000** and **Asset** fields, if not displayed by default
By expanding the folder structure in the **Object Hierarchy** section, you can view the assets associated to the Usage Object.

**Building 1000/200041/1 Create: Assignments**

<table>
<thead>
<tr>
<th>Object Hierarchy</th>
<th>Name</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset Assignment</td>
<td>1000/120000202/0</td>
<td></td>
<td>FAO6- Building #1</td>
</tr>
<tr>
<td>Functional Location Assignment</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Create Usage Objects: Business Entity, Building and Land

Search for an asset number by using specific search criteria in the **Assets** tab.

- **Create Usage Objects** - Business Entity, Building and Land
- **Approve & Release Usage Objects**
Create Usage Objects: Business Entity, Building and Land

Click the **General Data** tab

Click the **Change User Status** icon

**Note:** We are returning to the **General Data** tab to update the **User Status** field, as we are now ready to submit the Usage Object for approval by the Facilities Manager. It is advised not to carry out this step until all other tabs have been properly populated.
The **Set User Status** window appears.

1. Set the User Status to **02 REQS Approval Requested**
2. Click the **Continue** icon

Change the User Status to REQS so that you can request approval. This will enable the Approver to go in and approve.

**Note**: The UOID Number must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
Click the **Check** icon. This functionality checks the Usage Object entry for errors and gives you a message on the bottom left hand corner.

Click the **Save** icon to save the record.

The Usage Object: **Building** is created with all data entered in previous steps and Building number assigned. The Building is also classified as a Fixed Asset.
If a Usage Object was created in error, or is rejected by the Facilities Manager:

- The **Valid From** date and **Valid To** date (within the **General Data** tab) must be updated to today’s date, thereby making it an inactive Architectural Object.

- Obsolete Usage Objects will not be immediately removed from Umoja, for recordkeeping and auditing purposes.

- If necessary, a new Usage Object must be created, with a **Valid To** date effective from today’s date.

**Note:** The Usage Object ID Number of the new Usage Object must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
Umoja Hands-on

✓ Create a Usage Object: **Building**

✓ Create a Usage Objects: **Land/Property**
Activity 1

**Transaction Name:** Create Usage Object-Building

**Transaction Code:** RE80

**Link to the uPerform simulation:**
http://unsapuperform.umoja.un.org/gm/folder-1.11.2891?mode=EU&originalContext=1.11.2555
Touch Points

The Umoja system is an integrated system and most of its modules integrate with each other to complete a process. Touch points refer to these integration points across Umoja modules, processes and activities.

* Close collaboration is required between the Asset Accountant and the RE team to ensure that usage objects are manually associated with the fixed asset record.

**Note:** Under IPSAS, land/property, buildings and infrastructure assets under the control of UN and above the capitalization threshold (currently self-constructed assets are set at $100,000) are reported in the financial statements.
Learning Checkpoint 1

Which of the following statements are correct about Usage objects?

Select all that apply.

A. The Usage Object: Business Entity is the financial view of the Architectural Object: Site
B. The measurements carried forward from the Architectural Object cannot be edited in the Usage Object
C. Posting Parameters (Business Area, Profit Center, Fund, Funds Center and Grant) are required to create the Business Entity
D. In the Usage View, it is possible to attribute a Fixed Asset to a Business Entity
Learning Checkpoint 1

Which of the following statements are correct about Usage objects?

Select all that apply.

A. The Usage Object: Business Entity is the financial view of the Architectural Object: Site
B. The measurements carried forward from the Architectural Object cannot be edited in the Usage Object
C. Posting Parameters (Business Area, Profit Center, Fund, Funds Center and Grant) are required to create the Business Entity
D. In the Usage View, it is possible to attribute a Fixed Asset to a Business Entity

Options B and D are instead incorrect statements about Usage objects. Measurements can be updated in Usage objects for financial postings. In addition, Fixed Assets are assigned at subordinate objects below business entity.
Module 3 Summary

The key points covered in this module are listed below:

- The Facilities Planner is responsible for creating and maintaining Usage Objects.
- The Facilities Planner creates the Business Entity, Building and Land/Property from the respective Architectural Objects within the Company Code.
- A Usage Object classified as a Fixed Asset must be manually linked with the corresponding Fixed Asset number.
- The Facilities Planner must set the Architectural Object to REQS Approval Requested status in order to make it available for approval by the Facilities Manager.
## Agenda

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- Module 4: Create Pooled Space
- Module 5: Approve Real Estate Objects
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- Module 7: Real Estate Reporting
- Course Summary
- Course Assessment
- Course Survey
Module 4 Objectives

After completing this module, you will be able to:

• Identify the steps involved in creating Pooled Space
• Identify the steps involved in extracting Rental Spaces from Pooled Spaces
Pooled Spaces: Overview

The Facilities Planner creates the Usage Object for Pooled Space. After it is created, the Facilities Planner extracts the Rental Spaces. Rental Spaces are used mainly for lease-out contracts in order to sublet a building or part of it, however it is possible to use it for lease-in contract as well.
Creating Pooled Spaces & Extracting Rental Spaces

The high-level steps in creating Pooled Spaces and extracting Rental Spaces are as follows:

1. Facility Planner: Create Usage Object - Pooled Space
2. Facility Planner: Extract Rental Space
3. Facility Manager: Approve & Release Usage objects

**Note:** Pooled Space can be created even when Architectural object/Usage object is not approved. However, financial postings to the Pooled Space (rental space) cannot occur until they are approved and released.
The steps to create a Usage Object for Pooled Space are:

1. Run transaction RE80. Alternatively, from the SAP menu, select Accounting > Flexible Real Estate Management > Master Data > RE Navigator.
The RE Navigator screen appears. The next steps are:

2 Select the Rental Object list item in the drop down portion of the Navigation area on the left hand side of the screen

3 Click the Create icon
Create Usage Object - Pooled Space

The **Create Rental Object** pop-up window appears.

1. Select the **Pooled Space** list item in the **Rental Object Type** drop-down.
2. Select the **Usage Type** from the drop-down menu.
3. Select the **Create from Architecture** check box.
4. Populate the **Arch.obj.ID** field with the AOID of Usage Object: **Floor**.
5. Click the **Continue** icon.

**Note:** The **Arch.Obj.ID** entered here is for the Architectural Object: **Floor**. The numerical format for Architectural Object IDs is based on the Architectural View hierarchy.

For example, a building with one floor and a designated pooled space would be represented as: `<Building number.floor number.pooled space number>`. 
The next steps are:

9. Click the **General Data** tab
10. Populate the data in the **Name of RO** field
11. Populate the data in the **Valid From** and **To** fields
12. Populate the data in the **Authorization Group** field

**Note:** The **Valid From** and **To** field defines the validity period of the Usage Object you are creating. In creating a Lease-in or Lease-out, it is associated to the start and end dates of the lease contract.
Click the **Measurements** tab and confirm that the measurements were copied correctly.

**Note**: By default, the first time you select the **Measurements** tab, inherited values from Architectural Object are shown.
Return to the **General Data** tab and click the **Change User Status** icon.

**Note:** We are returning to the **General Data** tab to update the **User Status** field, as we are now ready to submit the Usage Object for approval by the Facilities Manager. It is advised not to carry out this step until all other tabs have been properly populated.
The **Set User Status** window appears.

15. Set the User Status to **02 REQS Approval Requested**

16. Click the **Continue** icon

**Note:** The UOID Number must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
The next steps are:

17. Click the **Check** icon. This functionality checks the Usage Object entry for errors and gives you a message on the bottom left hand corner.

18. Click the **Save** icon

**Note:** Note that the Status Bar displays a message indicating that no errors were found. When the **Save** icon is clicked, the UOID (Usage Object ID) is displayed.
The steps to extract rental spaces are:

1. Run transaction **RE80**. Alternatively, from the SAP menu, select **Accounting > Flexible Real Estate Management > Master Data > RE Navigator**.
Extract Rental Space

The RE Navigator screen appears.

2. Select the **Rental Object** list item in the drop-down portion of the Navigation area on the left hand side of the screen.

3. Click the **Create** icon.
Extract Rental Space

The Create Rental Object pop-up window appears.

4. Select the Rental Space list item in the Rental Object Type drop-down

5. Populate the data in the Usage Type, Business Entity and Pooled Space fields. Populate the Company Code to 1000, if not appeared by default

6. Click the Continue icon

Note: When we extract rental space, we do not select the Create from Architecture check box to identify a corresponding Arch. Obj. ID. This is attributed to the fact that the extracted rental space may be smaller than the identified pooled space and thus, will not have a corresponding Architectural Object (Arch. Obj. ID) to reference.
The next steps are:

7. Click the **General Data** tab

8. Populate the data in the **Name of RO**, **Valid From** and **To** and **Authorization Group** fields

**Note:** The **Valid From** and **To** field defines the validity period of the Usage Object you are creating. In creating a Lease-in or Lease-out, it is associated to the start and end dates of the lease contract.
The next steps are:

9. Click the **Measurements** tab

10. Populate the data in the **MeasTp, Size, MeasFrom** and **MeasValidTo** fields
Return to the **General Data** tab and click the **Change User Status** icon

**Note:** We are returning to the **General Data** tab to update the **User Status** field, as we are now ready to submit the Usage Object for approval by the Facilities Manager. It is advised not to carry out this step until all other tabs have been properly populated.
The **Set User Status** window appears.

12. Set the User Status to **02 REQS Approval Requested**
13. Click the **Continue** icon

**Note**: The UOID Number must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
The next steps are:

14. Click the **Check** icon. This functionality checks the Usage Object entry for errors and gives you a message on the bottom left hand corner.

15. Click the **Save** icon.

**Note:** Note that the Status Bar displays a message indicating that no errors were found. When the **Save** icon is clicked, the UOID (Usage Object ID) is displayed.
Umoja Hands-on

✓ Create a Rental Object: **Pooled Space**

✓ Extract a **Rental Space**
Activity 1

Transaction Name: Create Pooled Space (Usage Object)

Transaction Code: RE80

Link to the uPerform simulation: http://unsapuperform.umoja.un.org/gm/folder-1.11.2895?mode=EU&originalContext=1.11.2555
Activity 2

Transaction Name: Create Rental Space (From Pooled Space)

Transaction Code: RE80

Link to the uPerform simulation: http://unsapuperform.umoja.un.org/gm/folder-1.11.2899?mode=EU&originalContext=1.11.2555
Learning Checkpoint 1

Once Pooled Space is created, it can be directly referenced and rented out via Lease Contracts?

*Select the correct option.*

A. True
B. False
Learning Checkpoint 1

Once Pooled Space is created, it can be directly referenced and rented out via Lease Contracts?

*Select the correct option.*

A. True

B. False

Options B is the correct answer. Pooled Space cannot be rented out and referenced on Lease Contracts. Rental space must be subsequently extracted out from the identified Pooled Space.
Module 4 Summary

The key points covered in this module are listed below:

• The Facilities Planner extracts the Rental Space(s) from the Usage Object: Pooled Space

• Pooled Space can be created even when Architectural object/Usage object is not approved. However, financial postings to the Pooled Space (rental space) cannot occur until they are approved and released

• The Facilities Planner must set the Pooled Space and Rental Space’s User Status field to **REQS Approval Requested** status in order to make it available for approval by the Facilities Manager
# Agenda

| Module 1: Portfolio Management Overview |
| Module 2: Create and Maintain Architectural Objects |
| Module 3: Create and Maintain Usage Objects |
| Module 4: Create Pooled Space |
| **Module 5: Approve Real Estate Objects** |
| Module 6: Functional Location and Building Components |
| Module 7: Real Estate Reporting |
| Course Summary |
| Course Assessment |
| Course Survey |
Module 5 Objectives

After completing this module, you will be able to:

• Approve Architectural Objects
• Approve and release Usage Objects
Approving Architectural/Usage Objects: Differences

After the Architectural Object is created, the Facilities Manager reviews all the data for the Real Estate objects and approves the Architectural or Usage Objects.

<table>
<thead>
<tr>
<th>Steps to approve Architectural Objects</th>
<th>Steps to approve Usage Objects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter <strong>RE80</strong> in the <strong>Command</strong> field</td>
<td>Enter <strong>RE80</strong> in the <strong>Command</strong> field</td>
</tr>
<tr>
<td>Click the <strong>Enter</strong> icon</td>
<td>Click the <strong>Enter</strong> icon</td>
</tr>
<tr>
<td>Search for <strong>Architectural Object</strong> in RE Navigator</td>
<td>Search for <strong>Usage Object</strong> in RE Navigator</td>
</tr>
<tr>
<td>Click the <strong>Display/Change</strong> icon</td>
<td>Click the <strong>Display/Change</strong> icon</td>
</tr>
<tr>
<td>Change User Status to <strong>APPR Approved</strong></td>
<td>Change User Status to <strong>APPR Approved</strong></td>
</tr>
<tr>
<td>Click the <strong>Save</strong> icon</td>
<td>Click the <strong>Save</strong> icon</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Release</strong> icon</td>
</tr>
</tbody>
</table>

**Note**: For the Architectural Objects, the Approver needs to change the User Status to **APPR Approved** and then save the record. For Usage Objects, after changing the User Status to **APPR Approved**, the Approver needs to ensure that the object is released by clicking the **Release** icon. Releasing the Usage Object makes it available for financial postings.
Finding Architectural and Usage Objects to Approve

If you select **Business entity** from the object name drop-down, you will only be able to review and approve all Usage Objects.

If you select **Architectural Object** from the object name drop-down, you will only be able to review and approve all Architectural Objects.

**Note:** There is no combined method of approving Architectural and Usage Objects using a single drop-down menu. However, the process to approve each type of Real Estate Object is similar.
Approve an Architectural Object

The detailed steps to approve the Architectural Objects are:

1. Enter **RE80** in the **Command** field
2. Click the **Enter** icon

You can also access this transaction using the SAP menu path: **Accounting > Flexible Real Estate Management > Master Data > RE Navigator**

**Note:** The AOID and UOID Number to be approved must be communicated to the Facilities Manager outside Umoja to facilitate the approval process.
Approve an Architectural Object

The steps to view and approve Architectural Objects in the RE-Navigator folder structure are:

- **3** Select the **Architectural Object** at the highest level listed under the object name column drop-down.
- **4** Click the **Find** icon to search for a Architectural Object. Alternatively, obtain the AOID number from the Facilities Planner and enter it in the field adjacent to the **Binoculars** icon.
Select the **Display** icon. Continue to expand out sub folders under that Architectural Object to view all subordinate Architectural Objects.

Double-click any **Architectural Object** to be automatically directed to the **General Data** tab specific to that object.
Click the **Change User Status** icon in the **General Data** tab for the object selected in the previous step.

**Note:** The Facilities Planner will have set this field to 02 REQS – Approval Requested, indicating the Architectural Object is ready for approval by the identified Facilities Manager.
Approve an Architectural Object

The steps to set user status are as follows:

8. Select the **APPR Approved** radio button
9. Click the **Continue** icon

**Note**: You must repeat these steps for every Architectural Object requiring approval.
The steps to approve and release Architectural Object are as follows:

1. The User Status changes to **APPR** *(Approved)*. Click the **Save** icon.

**Note**: The updated status of an Architectural Object can be reviewed in the **User Status** field of the **Status Display** section.
Similar to approving Architectural Objects, the steps to view and approve Usage Objects in the RE-Navigator folder structure are:

1. **Select Business Entity**, the highest level Usage Object available within any Usage view. It will be listed under the object name column drop-down.

2. **Click the Find icon** to search for a Usage Object. Alternatively, obtain the UOID number from the Facilities Planner and enter it in the field adjacent to the **Binoculars** icon.

---

**Run transaction code RE80**

**Set User Status to APPR Approved**

**Approve & Release Usage Object**
Select the **Display** icon

Continue to expand out sub folders under the Usage Object: **Business Entity** to view all subordinate Usage Objects. Double-click any **Usage Object** to be automatically directed to the **General Data** tab specific to that object.
Click the **Change User Status** icon in the **General Data** tab for the object selected in the previous step.

**Note:** The Facilities Planner will have set this field to 02 REQS – Approval Requested, indicating the Usage Object is ready for approval by the identified Facilities Manager.
Approve & Release a Usage Object

6. Changed the User Status to **APPR (Approved)**.
7. Click the **Release** icon to make the Usage Object available for Financial Posting.
8. Click the **Save** icon.

**Note:** Releasing the Usage Object makes it available for financial postings. The updated status of a Usage Object can be reviewed in the **User Status** field of the **Status Display** section.
Umoja Hands-on

- Approve the Architectural Objects and Usage Objects created in the previous exercises
Activity 1

**Transaction Name:** Approve Architectural and Usage Objects

**Transaction Code:** RE80

**Link to the uPerform simulation:**
http://unsapuperform.umoja.un.org/gm/folder-1.11.2903?mode=EU&originalContext=1.11.2555
Learning Checkpoint 1

Which of the following icons should be clicked to ensure that the Usage Object is available for financial posting?

*Select the correct option.*

A. Save icon  
B. Release icon  
C. Continue icon  
D. Change User Status icon
Learning Checkpoint 1

Which of the following icons should be clicked to ensure that the Usage Object is available for financial posting?

Select the correct option.

A. Save icon
B. Release icon
C. Continue icon
D. Change User Status icon

Option B is the correct answer. Clicking the Release icon ensures that the Usage Object is available for financial posting.
Module 5 Summary

The key points covered in this module are listed below:

- The Facilities Manager is responsible for approving Architectural and Usage Objects.
- Usage Objects require an additional step of ensuring the object is released by clicking the Release icon to allow financial postings.
## Agenda

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<thead>
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<th>Course Introduction</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>Module 2: Create and Maintain Architectural Objects</td>
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<tr>
<td>Module 3: Create and Maintain Usage Objects</td>
</tr>
<tr>
<td>Module 4: Create Pooled Space</td>
</tr>
<tr>
<td>Module 5: Approve Real Estate Objects</td>
</tr>
<tr>
<td><strong>Module 6: Functional Location and Building Components</strong></td>
</tr>
<tr>
<td>Module 7: Real Estate Reporting</td>
</tr>
<tr>
<td>Course Summary</td>
</tr>
<tr>
<td>Course Assessment</td>
</tr>
<tr>
<td>Course Survey</td>
</tr>
</tbody>
</table>
Module 6 Summary

After completing this module, you will be able to:

• Explain the key concepts of Functional Location
• Explain how Functional Location are created in the Real Estate solution
• Explain how Building Components are created and their use in Umoja
Functional Locations

• Within SAP Functional Locations allow for the representation of the “physical” locations where business processes may be undertaken such as maintenance or equipment installation. Where Real Estate is not a “deployed” solution these are created manually. Within Umoja Real Estate is a core component, as such Functional locations are created as a result of creating a site, a building, a floor etc.

• The Umoja Real Estate solution also accommodates the Tracking of Infrastructure Items (car parks, pavements, communication towers...), and building components (foundations, roof, services...). These are tracked in the Umoja Real Estate solution to accommodate IPSAS requirements and may or may not result in a fixed assets record, this being dependent on the assessed value of the item. If a fixed asset record IS created it is linked to its respective Real Estate Object.
• When an “Architectural Object” (AO) is created in Umoja a functional location is created. For buildings AO’s are created for:
  – Sites – Generally denoted by a physical address: e.g. Secretariat, Gigiri Complex, or Innovation Building (a stand alone building in New York)
  – Buildings – (Physical Building – Secretariat, Building H, Innovation, General Assembly)
  – Floor – (01-99: not all buildings will have floors dependent on their lease contract details)
  – Rooms - (0-999: not all buildings will have floors dependent on their lease contract details)
Site/Building Structure – Real Estate View

<table>
<thead>
<tr>
<th>Location *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site</td>
</tr>
<tr>
<td>Building</td>
</tr>
<tr>
<td>Floor</td>
</tr>
<tr>
<td>Room</td>
</tr>
<tr>
<td>Room</td>
</tr>
</tbody>
</table>

* This is equates to the Authorization Group /Group Functional Location to allow a entity specific view of data
The Functional Locations created in Real Estate create the “Physical” structure of the building into which we can install equipment. This allows for the building and its equipment* to be accurately recorded in Umoja.

The “Entity “ functional location is manually created to allow for the grouping of all sites within an entity (representative of the Authorization Group in Real Estate). Nothing will be linked to the grouping indicator other than the sites.

The schematic also shows the building components. This is addressed in subsequent slides, but these are represented as functional locations. NO equipment can be installed in these locations as they equate, in the main, to a system rather than a discrete location.
Functional Location - Building

Building 1000/100013/6 Display: Assignments

- General Data
- Value
- Measurements
- Posting Parameters
- Assignments

Object Hierarchy
- Asset Assignment
  - 1000/12000000155/0
  - Functional Location Assignment
    - Dormitory - A06

Asset Assignment: FXA-1000/12000000155/0 (Dormitory - A06) [Unlimited]

RE/FA Link

Asset Details
- Company Code: 1000
- Asset: 1000000155
- Valid From: 
- Valid To: 

Asset Explorer
- Company Code: 1000
- Asset: 1200000015
- Fiscal year: 2014

Planned values
- Book depreciation

No postings for selected fiscal year
IPSAS requires that the UN recognize and record Infrastructure items as well as buildings and this can have significant value and will potentially require both maintenance and further investment.

Infrastructure items are similar in RE Functionality to buildings, other than there is no subsequent structure automatically created. As such a site sewage system will have one entry under the site hierarchy, from both and Real Estate and a Plant Maintenance perspective. The system will not be split as this is not a requirement from a valuation perspective.

IF for maintenance reasons and Infrastructure item need to be split then this can be undertaken be the manually creation of functional location and assigning these accordingly. These locations have no Real Estate functionality.
Infrastructure – Real Estate Perspective

The report shows RE Infrastructure items recorded against UNON. These are classified in accordance with IPSAS criteria (Energy, Security etc.) which will point to the asset class if the capitalisation threshold for the item is realised.

The above will not be a fixed asset as the value is below USD100K.
### Functional Location Structure: Structure List

<table>
<thead>
<tr>
<th>Functional loc.</th>
<th>KE00</th>
<th>Valid From</th>
<th>11.08.2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>UN Office at Nairobi</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- 200678.435
- 200678.436
- 200678.437
- 200678.438
- 200678.439
- 200678.440
- 200678.441
- 200678.442
- 200678.443
- 200678.444
- 200678.445
- 200678.446
- 200678.447
- 200678.448
- 200678.449
- 200678.450
- 200678.451
- 200678.452
- 200678.453
- 200678.454
- 200678.455
- 200678.456

Example from UNON. All the Infrastructure items site under the Gigiri Complex Functional Location.
Componentization

- For OAHs and HQ there is a requirement that all owned buildings over the capitalisation threshold (USD100K) are componentised. This means the from a value perspective the building is split into several sub-assets that equate to a financial, rather than a physical view of the world.

- In Real Estate there will be a “zero” value building asset linked to a building. This will be broken down into several subassets for the building components.

- In Umoja to allow us to maintain a view of these sub-assets from an operational perspective, functional locations are created under the RE Building Functional location. The sub-asset is assigned to this functional location. From an equipment perspective installation to a component functional location is NOT possible as this is a representation of a financial, rather physical perspective.
Componentization – Functional Location

Under the building (created in RE) are functional locations created at the time of conversion, or manually that represent the financial view of the building components. **No** equipment can be installed to a building component as this is **Not** a physical location.

Against each building component the conversion value is held, for reporting and eventual conversion (at time of go-live) to a fixed asset. The FA will then be recorded against the functional location. The purpose of recording the FA against the functional location is then in **specific** cases a work order may be created against the functional location rather than the individual items of equipment to allow settlement to the asset.
Componentization and Equipment

- A building component Fixed asset is a non-physical representation of a myriad of physical equipment items that need to be maintained.
- Those pieces of equipment that need to be maintained are created and installed in their respective physical building location (e.g.: Room XX has electrical panel 1234 and Air Con unit 1235 installed)
- The individual pieces of equipment should carry the category as to which component they belong, but they are **NOT** asset in their own right regardless of value as this value is against the building component.
Composite Diagram

Functional Location Breakdown (Showing Building Components)

- Site 123456
  - Building 123456.001
    - Equip 001
    - Floor 123456.001.01
      - Equip 002
      - Room 1: 123456.001.01.001
      - Room 2: 123456.001.01.002
    - Floor 123456.001.02
    - Building Comp 123456.001..SV.CS
    - Building Comp 123456.001..SV.EL
      - Asset 01
  - Infrastructure 123456.400
    - Equip 004

- Level at which equipment can be assigned
- Componetisation FL
- RE AO
- FL
- Asset Assignment level
## IPSAS Building Components

<table>
<thead>
<tr>
<th>Class</th>
<th>Category</th>
<th>Component</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building</td>
<td>Exterior</td>
<td>Foundations &amp; Basements</td>
</tr>
<tr>
<td>Building</td>
<td>Exterior</td>
<td>Superstructure</td>
</tr>
<tr>
<td>Building</td>
<td>Exterior</td>
<td>Exterior Closure</td>
</tr>
<tr>
<td>Building</td>
<td>Roofing</td>
<td>Roofing</td>
</tr>
<tr>
<td>Building</td>
<td>Interior</td>
<td>Interior construction, staircases &amp; interior finishes</td>
</tr>
<tr>
<td>Building</td>
<td>Services</td>
<td>Conveying systems</td>
</tr>
<tr>
<td></td>
<td>Services</td>
<td>Plumbing</td>
</tr>
<tr>
<td></td>
<td>Services</td>
<td>HVAC</td>
</tr>
<tr>
<td></td>
<td>Services</td>
<td>Fire protection</td>
</tr>
<tr>
<td></td>
<td>Services</td>
<td>Electrical &amp; low-voltage systems</td>
</tr>
</tbody>
</table>
Module 5 Summary

The key points covered in this module are listed below:

• Within Umoja Real Estate Functional locations are created automatically as a result of creating Architectural Objects such site, building, floor etc.

• When required, (for owned buildings over the capitalization threshold) Umoja offers a solution to componentize buildings.
### Agenda

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**Module 7: Real Estate Reporting**

<table>
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<td>Course Assessment</td>
</tr>
<tr>
<td>Course Survey</td>
</tr>
</tbody>
</table>
Module 6 Objectives

After completing this module, you will be able to:

• Navigate the Umoja ECC to access Real Estate Reports
• Describe the purpose of select Real Estate Reports specific to Real Estate Portfolio Management
Portfolio Reports

The Standard Portfolio reports used across the Real Estate Management process are:

<table>
<thead>
<tr>
<th>Report</th>
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</thead>
<tbody>
<tr>
<td>Architectural Objects Report</td>
</tr>
<tr>
<td>Business Entities Report</td>
</tr>
<tr>
<td>Buildings Report</td>
</tr>
<tr>
<td>Land Report</td>
</tr>
<tr>
<td>Rental Units Report</td>
</tr>
<tr>
<td>Object Assignments Report</td>
</tr>
<tr>
<td>Occupancy of Rental Objects Report</td>
</tr>
<tr>
<td>Measurements Report</td>
</tr>
</tbody>
</table>
All Umoja ECC Real Estate reports can be centrally accessed by navigating through the sub-folders within the RE navigator.

The steps to access Umoja ECC Real Estate Reports are:

1. Enter RE80 in the Command field
2. Click the Enter icon
3. Click the Information Systems tab in the left-hand menu of the RE Navigator
4. Select the appropriate Master Data (ie Architectural Objects, Business Entities, Buildings, Land)
Customize View of ECC Real Estate Reports

The Dynamic Selections icon can be used to customize the view of information displayed in Umoja ECC reports.

The steps to customize the view of the Umoja ECC Real Estate Reports are:

1. Click the **Dynamic Selections** icon
2. Open the **Architectural Object** folder
3. Select **Authorization Group** from the drop down menu
4. Click **Copy selected** button
**Customize View of ECC Real Estate Reports**

5. Click the **Matchcode** icon next to the **Authorization Group** field.
6. Select an Authorization Group and click the **Copy** icon.
7. Click the **Execute** icon.

---

### Info System: Architectural Objects

#### Dynamic selections

- **Architectural Object**
- **Authorization Group**

#### Authorization Group (1) - 56 Entries found

<table>
<thead>
<tr>
<th>Authorization Group</th>
<th>Authorization Group Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNHQ - DPI</td>
<td>UNHQ - Department of Public Information</td>
</tr>
<tr>
<td>UNIFIL</td>
<td>UN Interim Force in Lebanon</td>
</tr>
<tr>
<td>UNIOGBIS</td>
<td>UN Integrated Peace-building Office in Guinea-Bissau</td>
</tr>
<tr>
<td>UNIPSIL</td>
<td>UN Integrated Peace-building Office in Sierra Leone</td>
</tr>
</tbody>
</table>
### Customize View of ECC Real Estate Reports

Run Transaction Code re80

Navigate RE Navigator Folder Structure

Select and Generate Appropriate Report

1. Each line is a dynamic link, click on it to navigate to the corresponding Real Estate Object
2. Click on the **Spreadsheet** icon to export the report in Excel
3. Click on the **Change Layout** icon to customize the report layout

#### Info System: Architectural Objects On 2014-01-09

<table>
<thead>
<tr>
<th>Arch. Obj</th>
<th>Name of AO Type</th>
<th>Valid From</th>
<th>Valid To</th>
<th>Name of Architectural Object</th>
<th>AO Function Name</th>
<th>Res. Area</th>
<th>Object Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>100000</td>
<td>Site</td>
<td>2006-10-01</td>
<td></td>
<td>Paq D Anon / 2-4</td>
<td>Toilets</td>
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<tr>
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<td>Hard Wall Structure</td>
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<tr>
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<td>Hard Wall Structure</td>
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<tr>
<td>100000.009</td>
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<td>B06</td>
<td>Bunker-Other</td>
<td>Hard Wall Structure</td>
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<tr>
<td>100000.010</td>
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</table>
In the Change Layout popup window select item(s) under the **Column content** list you need to remove from the report and click the **Hide selected Fields** icon.

Select items under the **Hidden Fields** you need to show in the report and click the **Show Sel. Field** icon.
Customize View of ECC Real Estate Reports

13. Clicking on a dynamic link to navigate to the corresponding Real Estate Object
14. To go back from the opened Real Estate Object to the report click on the Back icon
Portfolio Reports

Architectural Objects Report

This report provides an overview of selected Architectural Objects and their object type and function.

A sample screenshot of the Architectural Objects Report is given below:
Portfolio Reports

Business Entities Report

This report provides an overview of selected business entities, based on period.

A sample screenshot of the Business Entities Report is given below:
Portfolio Reports

Buildings Report

This report provides an overview of selected buildings, as associated to business entities and/or period.

A sample screenshot of the Buildings Report is given below:
Portfolio Reports

Land Report

This report provides an overview of land entities, as associated to business entities and/or period.

A sample screenshot of the Land Report is given below:
Umoja Hands-on

✅ Experience Umoja Standard Real Estate Reports
Learning Checkpoint 1

Which of the following reports provide an overview of the selected Architectural Objects and their object type and function?

Select the correct option.

A. Architectural Objects Report
B. Object Assignments Report
C. Occupancy of Rental Objects Report
D. Measurements Report
Learning Checkpoint 1

Which of the following reports provide an overview of the selected Architectural Objects and their object type and function?

Select the correct option.

A. Architectural Objects Report
B. Object Assignments Report
C. Occupancy of Rental Objects Report
D. Measurements Report

Option A is the correct answer. Architectural Objects Report provides an overview of the selected Architectural Objects and their object type and function.
Module 6 Summary

The key points covered in this module are listed below:

• Dynamic selections can be used to customize the view of information within Umoja ECC Reports

• All Umoja ECC Real Estate reports can be centrally accessed by navigating through the sub-folders within the RE Navigator
## Agenda

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<tr>
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### Course Summary

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<tr>
<td>Course Survey</td>
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</table>
Course Summary

The key points covered in this course are listed below:

• Portfolio Management provides two different views, namely Architectural View and the Usage View of real estate portfolios

• The Master Data elements used within the Real Estate Portfolio Management are: Architectural Object, Usage Object and Business Partner

• The Facilities Planner creates the architectural hierarchy (site/building/floor/rooms) based on the information available from architectural drawings

• The Facilities Planner creates the Business Entity, Building and Land/Property from the respective Architectural Objects within the Company Code

• Once created by the Facility Planner, the Facility Manager need to approve the Architectural Objects and approve and release the Usage Objects

• Within Umoja Real Estate Functional locations are created automatically as a result of creating Architectural Objects

• When required, Umoja offers a solution to componentize the buildings

• Various reports are used across the Real Estate Management process as standard portfolio reports
## Agenda

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</table>
Course Assessment

Now that you have completed all the modules in this course, you can test your knowledge by completing the Course Assessment.

To receive credit for completing this course, you must pass this assessment with a minimum score of 90%.

To complete the assessment you must return to the Learning Management System:
1. Log into Inspira
2. Navigate to Main Menu -> Self-Service -> Learning -> My Learning
3. Search for the name of the course under the My Learning Activities section
4. Click the Start link of the course assessment
5. Click the Submit button once you have completed the assessment
### Agenda

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</table>
Course Survey

Your feedback is important to the continuous improvement of our training program.

Please complete the evaluation for this course using the following steps:

1. Log into Inspira
2. Navigate to Main Menu -> Self-Service -> Learning -> My Learning
3. Search for the name of the course under the My Learning Activities section
4. Click the Start link of the course survey
5. Click the Submit button once you have completed the course survey
Congratulations! You have successfully completed the *Umoja Real Estate Portfolio Management* course.