

# Space Information and Management System (SIMS) 4.0 User's Guide

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THE OHIO STATE UNIVERSITY

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EvolveFM



**Facilities Information and Technology Services**

**<http://go.osu.edu/fits>**

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SIMS 4.0 is referenced by the product name Evolve or EvolveFM throughout this document.

## **Evolve FM®**

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# Section 1: Using Evolve FM



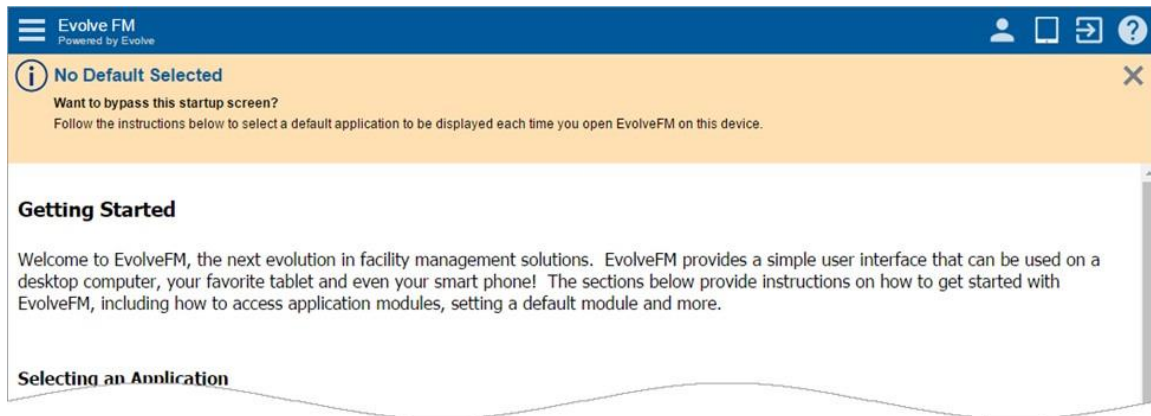
# Chapter 1.1: Getting Started

## About the Evolve FM Interface

The Evolve FM user interface is designed for mobility; it is designed to automatically resize to the screen size the application is being viewed on. Log in from a computer, a tablet, or a phone, and the interface layout will display to fit your device.

### The Start-Up Screen

The Start-Up screen, shown in the image below, is the default screen display in Evolve FM. You can bypass this screen and automatically display a selected module by choosing a [Default Module in your User Profile](#).



### Device Menu Display

Menu icons will display differently depending upon the screen size of the device you are logged in on. **Large**

#### Screens

Larger screens will display individual icons for specific actions in Evolve.



Smaller screens will display the More Actions icon in place of the individual icons. The More Actions icon, when clicked, will display a flyout menu with the same actions available in the individual icon display.



## The Application Menu Bar

Located along the top edge of the Evolve FM interface is the Application Menu Bar.



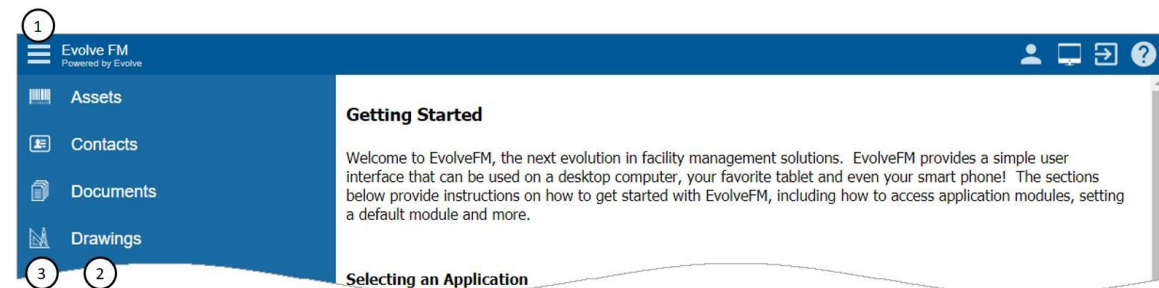
ITEM	CONTROL	DESCRIPTION
1	Show Applications	Click to show the Applications Menu. Use this menu to navigate between all of your Evolve FM modules (Space, Assets, Drawings, etc.). The modules listed in the Applications Menu are controlled by your user permissions.
2	Profile	Click to open the Profile dialog. Use the Profile dialog to change your user name, select your default language, and to select your default module.
3	Layout	Click to show the screen Layout Options. You can choose a default screen layout for the device you are logged in on. Each time you log into Evolve FM on that device, the screen will automatically format to the device type selected here. Options include Computer, Tablet, Phone, and Auto Detect, which will automatically layout the Evolve FM interface based on the device type used at log in.
4	Logout	Click to log out of Evolve FM.
5	Help	Click to show the Evolve FM Help options. The Evolve FM version ID is also located here.

**NOTE!** Smaller screens will display options 2-5 on the [More Actions](#) flyout menu.



## The Applications Menu

The Applications Menu is used to navigate between all of the Evolve FM application modules included with your organization's Evolve FM facility management software.



ITEM	CONTROL	DESCRIPTION
1	Show / Hide	Click to show/hide the Applications Menu.
2	Module List	Click the module name in the application list to access that module.
3	Open in New Tab	Click the module icon to open a module in a new browser tab. This allows you to have two or more modules open at one time without tying up an additional user license. The open tabs are single module access only; you must return to your open licensed Evolve FM browser tab to repossess access to the Applications Menu.

## Application Modules


The Applications Menu includes modules based on the software purchased by your organization, and the user permissions configured by your Evolve FM administrator.

Below is a table of the modules included with the Evolve FM Space & Asset Management software.

MODULE	DESCRIPTION
Facilities Information	View drawings and manage related data.
Archived Projects	View Record Documents from completed construction projects
Reporting	Produce drawing & data reports.
Space	Manage properties, buildings, floors, space, and occupants within the organization.

## How to Set Your Default Module

You can bypass the Start-Up screen and open Evolve FM to a specific module (typically the module you use most) by setting a Default Module in your User Profile as outlined below.

1. Click the Profile icon  to open the Profile dialog (or the [More Actions](#) flyout menu, and then Profile).
2. In the Default Module pick list, select a module.

## About Dialog Forms

Evolve FM dialog forms are used to enter, edit, and view, data records in the Evolve FM database.

## Dialog Controls

All dialog forms are comprised of the same overall components. The Space dialog shown below, includes the general data tabs and dialog controls, found on most dialog forms in Evolve FM.

## SPACE DIALOG

The screenshot shows the 'SPACE DIALOG' window. At the top, a blue header bar contains the title 'Space: B106' (1), a maximize button (2), and a close button (3). Below the header is a tab bar (4) with 'Attributes' selected, and other tabs: 'Detail', 'FICM', 'Picture', 'Contacts', 'Occupants', 'Assets', 'Allocation', 'Documents', and 'Work Orders'. A record selector (5) with left and right arrows is below the tabs. Two icons (6 and 7) are next to the selector. The main form area (8) contains several fields: 'Space ID\*' (with value 'B106'), 'Tag' (with value '000003922'), 'Space Name', 'Description', 'Property\*' (with value 'Manchester NH'), 'Area' (with value '229'), and 'Area 2'. There are checkboxes for 'Schedulable' and 'Allocate Manually'. A scroll bar (11) is on the right. At the bottom, there are 'Save' (9) and 'Cancel' (10) buttons.

**NOTE!** You can resize the dialog by pulling & stretching the edges of the form.

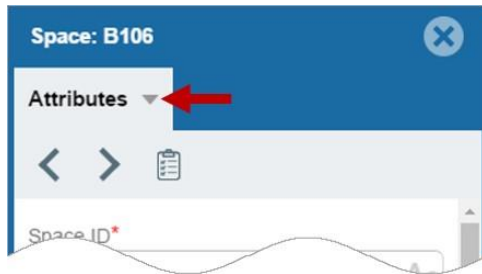


ITEM	CONTROL	DESCRIPTION
1	Active Record	Identifies the active data record.
2	Maximize	Click to maximize the dialog to full view.
3	Exit	Click to cancel changes & close the dialog.
4	Tab Bar	Each data tab stores additional information about the active data record.
5	Record Selector	< Move backwards one data record. > Move forward one data record.
6	Service Request	Click to open the Request dialog. The Evolve FM Operations & Maintenance software module is required for this feature. **This button does not work in SIMS**
7	Open Drawing	Click to open the Space Location Viewer, where the space related to the dialog record is highlighted. Use the zoom controls to pan & zoom the drawing. Available on the Space, Asset, Occupant, and Work Order dialogs.
8	Required Data Field	A red asterisk next to a data field identifies required data.
9	Save	Click to save data changes & close the dialog.
10	Cancel	Click to cancel data changes & close the dialog.
11	Scroll Bar	Scroll up/down to access dialog data fields.

## Smaller Screens

When the dialog is resized to a smaller size, the Tab Bar will minimize to a selection list.

SPACE DIALOG, SMALL SCREEN

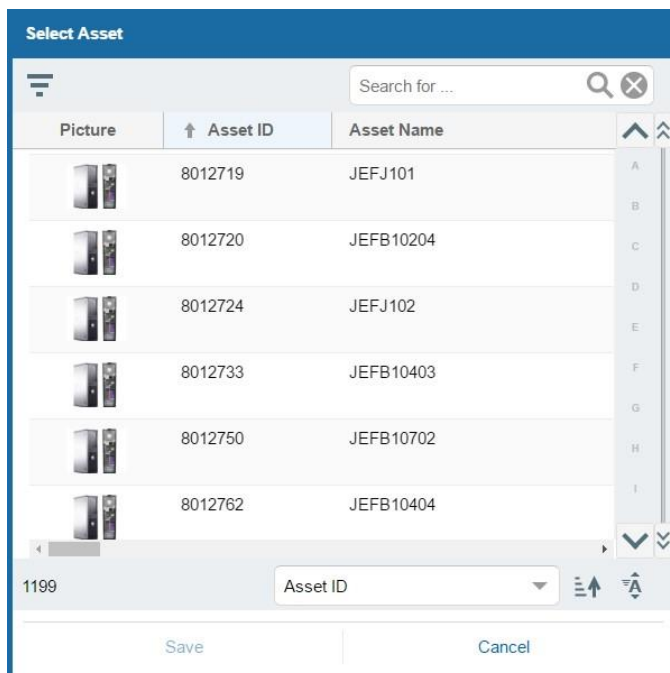


## Dialog Select Record Grid

Select Record Dialog grids, as illustrated in the Select Asset dialog below, have the same search & filter features found on the Evolve FM application grids. Use these controls to search & select data records.

- Active Column Control
- Filter Bar
- Quick Search
- Advanced Search. Click the  Filters icon to expand the search panel.

SELECT ASSET DIALOG



# Chapter 1.2:

## Application Grids

### About Application Grids

The application grids throughout Evolve FM are used to manage your data records stored in the Evolve FM database. The grids are also designed to be used for interactive tabular reporting, providing search & filter tools, grid column arrangement & save tools, and the ability to export the grid data to EXCEL format.

### The Grid Interface

The grid interface provides many controls used for working with data records. The grid view, shown below, displays individual data records in rows similar to a spreadsheet, and each column of the grid displays the Evolve FM attribute data assigned to each data record.

The screenshot shows the 'Space' module in Evolve FM. The interface includes a top navigation bar with tabs for Properties, Buildings, Floors, Space (active), and Occupants. A search bar is located on the right. The main grid displays a list of space records with columns for Space ID, Space Name, Description, Space Category, Space Class, Space Sub Class, and Area. A record count of 1852 is shown at the bottom left. Callouts 1 through 9 identify specific UI elements: 1 (Applications Menu icon), 2 (Page Bar tabs), 3 (Grid Menu icon), 4 (Grid data rows), 5 (Record Count), 6 (Column Headers), 7 (Quick Search bar), 8 (Filter Bar), and 9 (Active Column dropdown).

Space ID	Space Name	Description	Space Category	Space Class	Space Sub Class	Area
B015			Service Area	Primary Circulation	Vestibule	37.03
B101			Usable Area	Business Support	Conference 18	651.36
B101A			Usable Area	Storage	Storage Closet	3.17
B101B			Usable Area	Storage	Storage Closet	6.92
B101C			Usable Area	Storage	Storage Closet	24.08
B101D			Usable Area	Storage	Storage Closet	8.67
B102			Usable Area	Business Support	Training/Classroom	718.97
B102A			Usable Area	Storage	Storage Closet	2.90
B102B			Usable Area	Storage	Storage Closet	6.34
B102C			Usable Area	Storage	Storage Closet	21.92
B102D			Usable Area	Storage	Storage Closet	11.76
B103			Usable Area	Business Support	Training/Classroom	711.03
B103A			Usable Area	Storage	Storage Closet	3.17
B103B			Usable Area	Storage	Storage Closet	4.00
B103C			Usable Area	Storage	Storage Closet	23.50
B103D			Usable Area	Storage	Storage Closet	9.33
B104			Usable Area	Business Support	Conference 18	656.90
B104A			Usable Area	Storage	Storage Closet	3.17
B104B			Usable Area	Storage	Storage Closet	7.08
B104C			Usable Area	Storage	Storage Closet	23.75
B105			Usable Area	Office	Office Double	330.78
B106			Usable Area	Office	Office Single	229.17

ITEM	CONTROL	DESCRIPTION
1	Applications Menu	Click to show the Applications Menu, which is used to navigate between modules in Evolve FM. The active module name is shown to the right of the menu icon.
2	Page Bar	Use to move between pages within the active module. The Space module shown above contains 5 pages, one each for Properties, Buildings, Floors, Space, and Occupants. The Space page is the active page.
3	<a href="#">Grid Menu</a>	The Grid Menu is used to manage & report data records in the grid.
4	Grid	All active data records related to the active page. The Space page shown above, includes all active space data records stored in the Evolve FM database.
5	Record Count	The total number of data records in the grid.
6	Column Headers	Identifies the Evolve FM attribute data in the grid column.
7	<a href="#">Quick Search</a>	Use to filter the grid.
8	<a href="#">Filter Bar</a>	Use to filter the grid.
9	Active Column	Identifies the data column selected on the grid, & is used with the Filter Bar.

## Grid Menu Controls

From this menu, data can be filtered, and imported or exported from the grid, for easy tabular reporting. Most users will only be able to see/use the Filter, Open, and More Actions buttons (1, 3, and 6).

ITEM	CONTROL	DESCRIPTION
1	<a href="#">Filters</a>	Click to show the Filters panel. From the Filters panel, you can perform an advanced grid search, and save a user defined grid view.
2	New	Click to create a new data record in the grid.
3	Remove	Click to delete a data record(s) from the grid.
4	Open	Click to open the dialog form of a selected data record.
5	Scan Code	Click to activate your device camera to scan a QR Code and open its related data record. This function is only available with the Evolve FM Scan Code Professional Tool add-on.
6	More Actions	Click to show the More Actions flyout menu. Use the menu to export the grid list, import data records, and to select a grid display option.

## Grid Display Options

The Display Options found on the More Actions flyout menu, allow you to change the grid display.

### To Change the Grid Display

1. Click the More Actions flyout menu, located on the Grid Menu.
2. Select a Display Option.

Options include:

- **List View.** Formatted for smaller screens.
- **Grid View.** Formatted for larger screens.
- **Auto Detect.** Displays either List View or Grid View based on the device type used at log in.

#### LIST VIEW

Properties	Buildings	Floors	Space	Occupants
160 Canal Street				
Office Space				
160 Canal Street				
Manchester NH 03101				
8 Harrison Street				
Office Space				
8 Harrison Street				
Manchester NH 03101				
Daniel Webster Highway				
Office Space				
Daniel Webster Highway				
Merrimack NH				

#### GRID VIEW

Name	Description	Type	Total Area
160 Canal Street	Office Space	Building	51,794.00
8 Harrison Street	Office Space	Building	16,036.00
Daniel Webster Highway	Office Space	Building	58,307.00
Fitness Center	Employee health and fitness center	Building	35,303.00
Mechanic Street	Manufacturing	Building	76,336.00
Union Park	Office Space	Building	45,863.00
Washington Street	Office Space	Building	57,171.00



## Search & Filter Features

Grid search & filter features allow you to query the Evolve FM database based on search criteria. When data records are found during the query that match the search criteria, the grid filters to show only those records.

### Filter Bar

#### The Active Column Control

The Active Column Control, located at the bottom right of the screen, works together with the Filter Bar. The control's combobox displays the name of the grid column that is currently selected on the grid, and the data in that grid column is queried during a Filter Bar search.

Space ID <span>①</span> <span>⌵</span> <span>⌵</span> <span>⬆</span> <span>②</span>		
ITEM	CONTROL	DESCRIPTION
1	Column List	Select a grid column name to make that column active in the grid.
2	Sort	Click to sort the active column data in ascending/descending order.




#### The Filter Bar

The Filter Bar, located along the right edge of the grid, is used together with the Active Column control. The letter or number selected on the Filter Bar is used as the search criteria, and the data in the active grid column is queried during the search.

The Filter Bar search will filter the data grid to show only the data records where the first character in the active grid column, matches the letter or number selected on the Filter Bar.

As an example, within Buildings, if Name is the active grid column, and you want to search for Farms, and the letter "F" is selected on the Filter Bar, the search results would include Farm Shop (0319), but would not include any of the Waterman Farm buildings, because those values do not begin with the letter "F".

#### Filter Bar Controls

CONTROL	DESCRIPTION
Character List	Includes letters A-Z, and numbers 1-9. NOTE: The selected character will highlight on the Filter Bar to show that the grid has a filter applied to its data.
	Click to scroll the Character list up.
	Click to scroll the Character list down.
	Click to hide/show the Filter Bar.



## Using the Filter Bar

### **Executing a search:**

1. In the Active Column control, select the grid column to be queried.
2. On the Filter Bar, select the letter or number that denotes the first character of your search criteria.

### **Clearing a search:**

1. On the Filter Bar, deselect the letter or number to clear the search.

## Quick Search

The Quick Search, located in the top right corner of the grid, is used to query the grid data based on the search criteria entered into the Quick Search textbox.

The Quick Search will filter the data grid to show only the data records where data in any grid column, matches the text entered into the Quick Search textbox.

As an example, if “Office” is entered into the Quick Search textbox, the search results would include Staff Office, Administrative Office, or spaces assigned to “Office of the CFO”, because all of those values contain the word “Office”.

### Quick Search Controls



ITEM	CONTROL	DESCRIPTION
1	Criteria Textbox	Enter the text to be queried. NOTE: When a search has been executed the Criteria Textbox will highlight to show that the grid has a filter applied to its data.
2	Find	Click to execute the search.
3	Clear	Click to clear the search.

### Using the Quick Search

#### **Executing a search:**

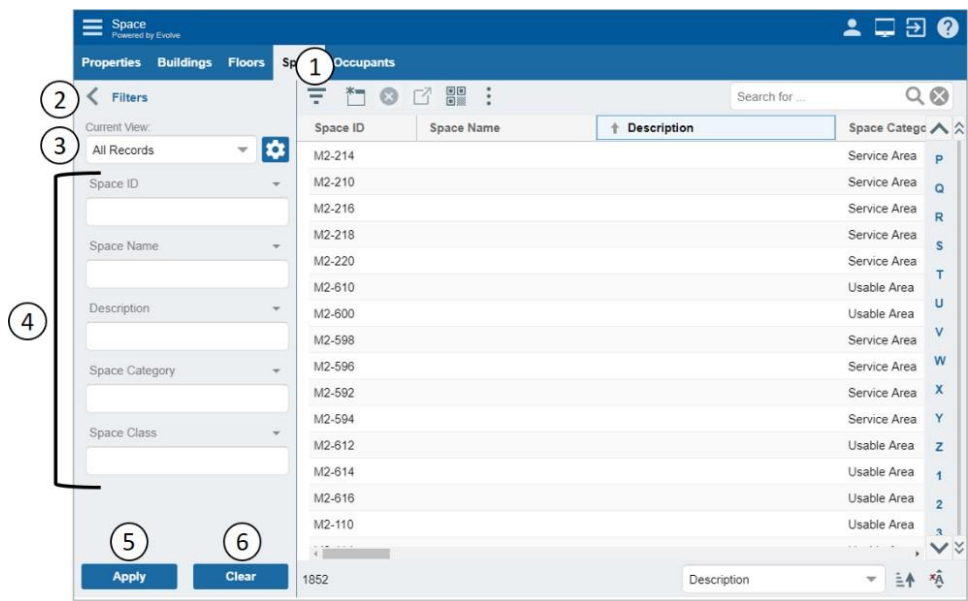
1. In the Quick Search textbox, enter the text to be queried.
2. Click Find.

**Clearing a search:** Click Clear.

## Advanced Search

The Advanced Search feature provides the ability to perform a multi-criteria data search. The five Criteria Sets located on the Filters panel, can be used to include five grid columns in a multi-data query.

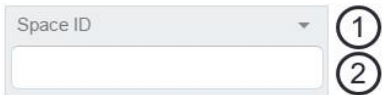
The Filters Panel



ITEM	CONTROL	DESCRIPTION
1	Filters	Click to open/close the Filters panel.
2	Close	Click to close the Filters panel.
3	Current View Controls	Use to select & save <a href="#">grid views</a> . NOTE: The Current View control is only available when the grid display is set to Grid View.
4	Criteria Sets	Five grid column selection lists, and their associated search criteria textboxes.
5	Apply	Click to execute the search.
6	Clear	Click to clear the search.

About the Criteria Sets

Each Criteria Set has two controls, a Grid Column Selection List, and its associated Criteria Textbox.



ITEM	CONTROL	DESCRIPTION
1	Grid Column Selection List	Select the grid column name to be queried.
2	Criteria Textbox	Enter the text to be queried.

The Advanced Search will filter the data grid to show only the data records that match all Criteria Sets used in the search. The image below illustrates a two-column data search (Building column & Space Class column). This search will filter the grid to display only the records in the “160 Canal Street” building that have a Space Class assignment of “Office”.

**FILTERS PANEL, 2 COLUMN SEARCH**

The screenshot shows the 'Space' application interface with the 'Filters' panel open. The panel has a blue header with the 'Space' logo and 'Powered by Evolve'. Below the header, there are tabs for 'Properties', 'Buildings', 'Floors', 'Space', and 'Occupancy'. The 'Filters' panel is divided into two columns. The left column contains a 'Current View' dropdown set to 'All Records', a 'Space ID' search field, a 'Building' dropdown set to '160 Canal Street', a 'Description' search field, a 'Space Category' dropdown, and a 'Space Class' dropdown set to 'Office'. At the bottom of the left column are 'Apply' and 'Clear' buttons. The right column displays a list of space IDs: B015, B101, B102, B103, B104, B105, B106, B107, B108, B109, B110, B111, B112, B113, B114, B115, B116, B117, B118, B119, B120, B121, B122, B123, B124, B125, B126, B127, B128, B129, B130, B131, B132, B133, B134, B135, B136, B137, B138, B139, B140, B141, B142, B143, B144, B145, B146, B147, B148, B149, B150, B151, B152, B153, B154, B155, B156, B157, B158, B159, B160, B161, B162, B163, B164, B165, B166, B167, B168, B169, B170, B171, B172, B173, B174, B175, B176, B177, B178, B179, B180, B181, B182, B183, B184, B185, B186, B187, B188, B189, B190, B191, B192, B193, B194, B195, B196, B197, B198, B199, B200, B201, B202, B203, B204, B205, B206, B207, B208, B209, B210, B211, B212, B213, B214, B215, B216, B217, B218, B219, B220, B221, B222, B223, B224, B225, B226, B227, B228, B229, B230, B231, B232, B233, B234, B235, B236, B237, B238, B239, B240, B241, B242, B243, B244, B245, B246, B247, B248, B249, B250, B251, B252, B253, B254, B255, B256, B257, B258, B259, B260, B261, B262, B263, B264, B265, B266, B267, B268, B269, B270, B271, B272, B273, B274, B275, B276, B277, B278, B279, B280, B281, B282, B283, B284, B285, B286, B287, B288, B289, B290, B291, B292, B293, B294, B295, B296, B297, B298, B299, B300, B301, B302, B303, B304, B305, B306, B307, B308, B309, B310, B311, B312, B313, B314, B315, B316, B317, B318, B319, B320, B321, B322, B323, B324, B325, B326, B327, B328, B329, B330, B331, B332, B333, B334, B335, B336, B337, B338, B339, B340, B341, B342, B343, B344, B345, B346, B347, B348, B349, B350, B351, B352, B353, B354, B355, B356, B357, B358, B359, B360, B361, B362, B363, B364, B365, B366, B367, B368, B369, B370, B371, B372, B373, B374, B375, B376, B377, B378, B379, B380, B381, B382, B383, B384, B385, B386, B387, B388, B389, B390, B391, B392, B393, B394, B395, B396, B397, B398, B399, B400, B401, B402, B403, B404, B405, B406, B407, B408, B409, B410, B411, B412, B413, B414, B415, B416, B417, B418, B419, B420, B421, B422, B423, B424, B425, B426, B427, B428, B429, B430, B431, B432, B433, B434, B435, B436, B437, B438, B439, B440, B441, B442, B443, B444, B445, B446, B447, B448, B449, B450, B451, B452, B453, B454, B455, B456, B457, B458, B459, B460, B461, B462, B463, B464, B465, B466, B467, B468, B469, B470, B471, B472, B473, B474, B475, B476, B477, B478, B479, B480, B481, B482, B483, B484, B485, B486, B487, B488, B489, B490, B491, B492, B493, B494, B495, B496, B497, B498, B499, B500, B501, B502, B503, B504, B505, B506, B507, B508, B509, B510, B511, B512, B513, B514, B515, B516, B517, B518, B519, B520, B521, B522, B523, B524, B525, B526, B527, B528, B529, B530, B531, B532, B533, B534, B535, B536, B537, B538, B539, B540, B541, B542, B543, B544, B545, B546, B547, B548, B549, B550, B551, B552, B553, B554, B555, B556, B557, B558, B559, B560, B561, B562, B563, B564, B565, B566, B567, B568, B569, B570, B571, B572, B573, B574, B575, B576, B577, B578, B579, B580, B581, B582, B583, B584, B585, B586, B587, B588, B589, B590, B591, B592, B593, B594, B595, B596, B597, B598, B599, B600, B601, B602, B603, B604, B605, B606, B607, B608, B609, B610, B611, B612, B613, B614, B615, B616, B617, B618, B619, B620, B621, B622, B623, B624, B625, B626, B627, B628, B629, B630, B631, B632, B633, B634, B635, B636, B637, B638, B639, B640, B641, B642, B643, B644, B645, B646, B647, B648, B649, B650, B651, B652, B653, B654, B655, B656, B657, B658, B659, B660, B661, B662, B663, B664, B665, B666, B667, B668, B669, B670, B671, B672, B673, B674, B675, B676, B677, B678, B679, B680, B681, B682, B683, B684, B685, B686, B687, B688, B689, B690, B691, B692, B693, B694, B695, B696, B697, B698, B699, B700, B701, B702, B703, B704, B705, B706, B707, B708, B709, B710, B711, B712, B713, B714, B715, B716, B717, B718, B719, B720, B721, B722, B723, B724, B725, B726, B727, B728, B729, B730, B731, B732, B733, B734, B735, B736, B737, B738, B739, B740, B741, B742, B743, B744, B745, B746, B747, B748, B749, B750, B751, B752, B753, B754, B755, B756, B757, B758, B759, B760, B761, B762, B763, B764, B765, B766, B767, B768, B769, B770, B771, B772, B773, B774, B775, B776, B777, B778, B779, B780, B781, B782, B783, B784, B785, B786, B787, B788, B789, B790, B791, B792, B793, B794, B795, B796, B797, B798, B799, B800, B801, B802, B803, B804, B805, B806, B807, B808, B809, B810, B811, B812, B813, B814, B815, B816, B817, B818, B819, B820, B821, B822, B823, B824, B825, B826, B827, B828, B829, B830, B831, B832, B833, B834, B835, B836, B837, B838, B839, B840, B841, B842, B843, B844, B845, B846, B847, B848, B849, B850, B851, B852, B853, B854, B855, B856, B857, B858, B859, B860, B861, B862, B863, B864, B865, B866, B867, B868, B869, B870, B871, B872, B873, B874, B875, B876, B877, B878, B879, B880, B881, B882, B883, B884, B885, B886, B887, B888, B889, B890, B891, B892, B893, B894, B895, B896, B897, B898, B899, B900, B901, B902, B903, B904, B905, B906, B907, B908, B909, B910, B911, B912, B913, B914, B915, B916, B917, B918, B919, B920, B921, B922, B923, B924, B925, B926, B927, B928, B929, B930, B931, B932, B933, B934, B935, B936, B937, B938, B939, B940, B941, B942, B943, B944, B945, B946, B947, B948, B949, B950, B951, B952, B953, B954, B955, B956, B957, B958, B959, B960, B961, B962, B963, B964, B965, B966, B967, B968, B969, B970, B971, B972, B973, B974, B975, B976, B977, B978, B979, B980, B981, B982, B983, B984, B985, B986, B987, B988, B989, B990, B991, B992, B993, B994, B995, B996, B997, B998, B999, 1852.

**Using the Advanced Search****Executing a search:**

1. On the Grid Menu, click the Filters icon to open the Filters panel.
2. In one of the Criteria Sets, select a grid column to be queried (or use one that is already displayed). You can change the Criteria Sets by clicking the dropdown arrow next to the criteria header and selecting what criteria you want.
3. In the Criteria Textbox, enter the text to be queried. The % sign is a wildcard feature if you don't know or have an exact match. I.e. if you want to search for all buildings with an 18<sup>th</sup> Ave address, you can search the Address criteria for %18th %.

**NOTE!** A selection list will be provided after the fourth text character is entered.



4. Repeat steps 2-3 as needed.
5. Click Apply to execute the search.

**Clearing a search:**

1. Click Clear.

## Search Criteria Operators

Search criteria operators can be used to refine your Advanced Search. The operators can be used in the Criteria Textboxes located on the Filters panel.

OPERATOR	DESCRIPTION	CRITERIA DATA TYPE
%	Wildcard	Alphanumeric
>	Greater than	Numeric
<	Less than	Numeric
>=	Greater than or equal to	Numeric
<=	Less than or equal to	Numeric
<>	Not Equal to	Alphanumeric
IS NULL	Field is blank/empty	Alphanumeric
NOT NULL	Field is not blank/empty	Alphanumeric

The example shown in the image below illustrates a four-column data search, executed from the Filters panel, using the wildcard operator (%) and the greater than operator (>).

### ADVANCED SEARCH, SEARCH OPERATOR EXAMPLE

The screenshot shows the 'Space' application interface. On the left, the 'Filters' panel is active, showing the following criteria:

- Current View: All Records
- Building: Union Park
- Floor: 8
- Space Sub Class: Cubicle%
- Available Seats: >0

The main data grid displays the following columns: Space ID, Building, Floor, Space Sub Class, and Available Seats. It shows 13 records, all of which are cubicles on floor 8 of Union Park, each with 1 available seat. The records are listed in alphabetical order by Space ID.

**NOTE!** The Filters panel highlights to show that the grid has a filter applied to its data.

In the image above, the grid has been filtered to show all vacant cubicles, of any size, located on floor 8 of the Union Park building, using the following Advanced Search criteria:

1. Building = Union Park
2. Floor = 8
3. Space Sub Class = Cubicle% (Wildcard: will find Cubicle 6x6, Cubicle 8x8, etc.)
4. Available Seats >0 (Greater than zero: will find all spaces that have at least 1 available seat.)

## How to Search for Dates

Date fields are shown throughout Evolve FM in the mm/dd/yyyy format. However, the date format in the Evolve FM SQL database is formatted as yyyy/mm/dd, and in some instances, may include the time as part of the data.

### Date Format

- Display format: 01/30/2017
- Database format (without time value): 2017/01/30
- Database format (with time value): 2017/01/30 12:00:00AM

### Search Format

The Database Format(s) shown in the above list, is what you need to use when searching for dates in Evolve FM (yyyy/mm/dd).

In the instances when the date data includes the time value, you must accommodate for that value in your data query.

### Wildcard for Time Value

To accommodate the time data in your query, include the wildcard (%) at the end of your search criteria (unless of course you know the exact time you are searching for).

### Date Search Examples

Work Order data is used in the following example.

**NOTE!** The % (wildcard) operator is added to the date search criteria.



- |                                      |             |                                       |
|--------------------------------------|-------------|---------------------------------------|
| ✦ All WO's closed on June 30, 2017   | 2017/06/30% | (wildcard for time)                   |
| ✦ All WO's closed in June 2017       | 2017/06%    | (wildcard for day/time)               |
| ✦ All WO's closed in 2017            | 2017%       | (wildcard for month/day/time)         |
| ✦ All June Work Orders, in all years | %/06/%      | (wildcard for year, and for day/time) |

## Grid Views

When an application grid is [displayed in Grid View](#), the grid can be reconfigured using the Column Header Controls. Once reconfigured, the new Grid View layout can be saved and reapplied at any time.

Grid Views are created at the user level in Evolve FM, therefore when a user creates a Grid View it can be viewed, edited, or removed by that user only.

## Column Header Controls

Column headers identify the Evolve FM attribute data in each of the Grid View columns. They can also be used to sort the column data, resize the column width, and to move column locations to reorganize the Grid View layout.

### To Sort a Column

Click a column header to toggle between an ascending and a descending sort order. The sort arrow on the column header indicates the order of the sort.

#### SPACE CATEGORY SORT, DESCENDING ORDER

Space ID	Space Name	Description	↓ Space Category
----------	------------	-------------	------------------

### To Resize a Column

Place your pointer over the vertical edge of the column header until the resize symbol appears, and then drag to resize the grid column width.

#### RESIZE CURSOR

Space ID	Space Name	Description	←  → Space Category
----------	------------	-------------	---------------------

### To Move a Column

Click and drag the column header to a new location within the header row. When a column header is moved over a valid placement position, the drop indicator appears to identify the drop position. The image below illustrates the Space Category column being dragged to the left of the Description column.

#### SPACE CATEGORY COLUMN MOVE

Space ID	Space Name	Description	Space Category
----------	------------	-------------	----------------

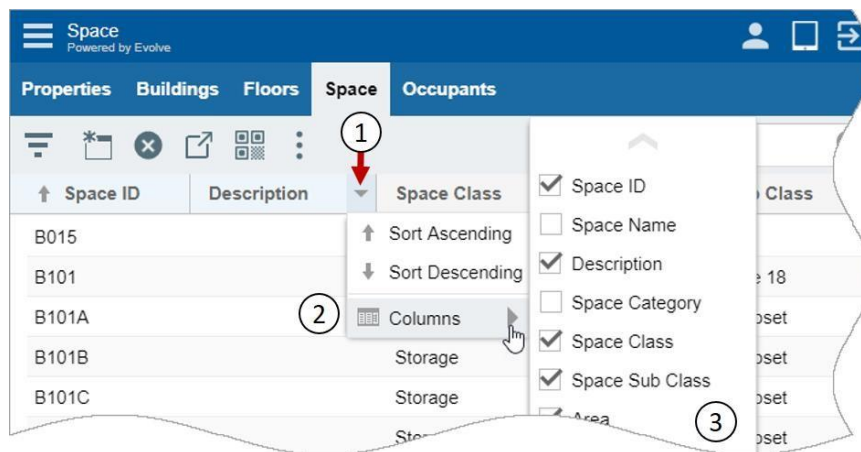


## Show/Hide Columns

The Columns Checklist, located on the Column Header Flyout Menu, is used to show or hide data columns in the Grid View layout.

### To Access the Columns Checklist

1. On the right edge of any column header, click to show the Column Header Flyout Menu.
2. On the flyout menu, click Columns to show the checklist.
3. Do either of the following:
  - Deselect a checkbox to hide the column in the Grid View layout.
  - Select a checkbox to show the column in the Grid View layout.

**COLUMN MENU**

## Grid Views as Tabular Reports

The ability to utilize the Column Header Controls to configure the Grid View layout, is enhanced by the ability to then save that layout as a new Grid View for your tabular reporting needs.

Each Grid View that you create, can be used together with the grid search features for interactive tabular reporting in Evolve FM.

- Display the Grid View, and then filter the data as needed for your reporting or editing needs.
- Export the Grid View to EXCEL to be used as an EXCEL report, or for further analysis.

## Creating a Grid View

The controls used to create and manage your user defined Grid Views, are located on the [Filters](#) panel.



ITEM	CONTROL	DESCRIPTION
1	Current View	The Current View selection list.
2	Manage View	Click to open the Manage View dialog.

## About the Current View

The Current View selection list, is used to apply a Grid View layout to the application grid. The list contains the Evolve FM system Grid View(s), and Grid Views created by the user.



## The Manage View Dialog

The Manage View dialog is used to create, edit, copy, and remove, user defined Grid Views. It can also be used to define the user's default Grid View, which will automatically display when the grid is displayed.

**NOTE!** Evolve FM system views cannot be edited or removed.



ITEM	CONTROL	DESCRIPTION
1	Name Display	Identifies the Grid View open for editing.
2	Remove	Click to delete the Grid View.
3	Name	<b>REQUIRED.</b> The name of the Grid View.
4	Default	Sets the Grid View as the user's default Grid View. The default Grid View will automatically display when the application grid is displayed.
5	Save	Click to save data changes & close the dialog.
6	Cancel	Click to cancel data changes & close the dialog.

## Managing your Grid Views

Grid Views are created and saved at the user level in Evolve FM, therefore when a user creates a Grid View it can be viewed, edited, or removed by that user only.

### To Add a Grid View:

1. Configure the grid layout by doing any of the following:
  - Move/resize grid columns.
  - Hide/show grid columns.
  - Sort data in grid columns.
2. On the Grid Menu, click the Filters icon to open the Filters panel.
3. Click the Manage View icon to open the Manage View dialog.
4. Enter the name of the new Grid View.
5. Click Save.

### To set a Default Grid View:

1. Do one of the following:
  - Add a new Grid View.

- Choose a view from the Current View selection list, and then open the Manage View dialog.
2. Select the Default checkbox on the Manage View dialog.
  3. Click Save.

**To Remove a grid view:**

1. In the Current View selection list, select the view that you want to remove.
2. Open the Manage View dialog.
3. Click Remove on the Manage View dialog.
4. Click Save.

**To Copy or Rename a grid view:**

Renaming an existing view essentially creates a copy of that view. If you do not want to keep the original version of the grid view, you will need to remove it from the Current View list.

1. In the Current View selection list, select the view that you want to rename or copy.
2. Open the Manage View dialog.
3. Edit the name of the Grid View.
4. Click Save.
5. Optional: Remove the original version of the Grid View from the Current View list.

## Export Data

When the grid display is set to Grid View, the data in the grid can be exported to EXCEL.

**To Export Data to EXCEL**

The More Actions flyout menu located on the Grid Menu contains the Export List function.

**NOTE!** The grid display must be set to Grid View.



1. Click the More Actions flyout menu, located on the Grid Menu.
2. Click Export List.

**EXPORTED GRID VIEW DATA**

	A	B	C	D	E	F	G	H
1	RecordID	Space Class (114)	Space Sub Class (102)	Building (55)	Floor (56)	Space ID (239)	Area (107)	Available Seats (132)
2	902	Workstation	Cubicle Standard	160 Canal Street	2	C2-840	96	1
3	914	Workstation	Cubicle Small	160 Canal Street	2	C2-808	64	1
4	934	Workstation	Cubicle Small	160 Canal Street	2	C2-916	64	1
5	937	Workstation	Cubicle Small	160 Canal Street	2	C2-910	64	1
6	945	Workstation	Cubicle Standard	160 Canal Street	2	C2-772	92	1
7	977	Workstation	Cubicle Double	160 Canal Street	2	C2-608	146.35	1
8	1042	Workstation	Cubicle Small	160 Canal Street	3	C3-912	64	1
9	1062	Workstation	Cubicle Small	160 Canal Street	3	C2-814	64.1	1
			Cubicle Standard	160 Canal Street			96	1

## About the Exported Data

### Record ID

The data exported to EXCEL includes the Evolve FM data Record ID in column A. The Record ID in this column, identifies the unique identifier Evolve FM assigned to each data record in the SQL database at the time the data record was created. While the Record ID is unique to each record, it is not created by OSU. The Building Number and Space ID will remain as the unique ID for any OSU building or space.

### Column Header

Each column header includes the Evolve FM data attribute name, and in parenthesis, its associated attribute ID. The attribute ID is the unique ID, assigned to each data attribute, in the Evolve FM SQL database.

#### TIP!



An EXCEL search & replace on the column header row, using the EXCEL wildcard \* (asterisk), will quickly remove the opening & closing parenthesis and the data between them.

1. In EXCEL, select the column header row.
2. Use the EXCEL Find & Replace tool to find **(\*)** and replace it with a blank value. Include a space before the opening parenthesis “ (” in the search to eliminate a trailing space at the end of the column header text.

## Chapter 1.3:

### Drawing Viewer

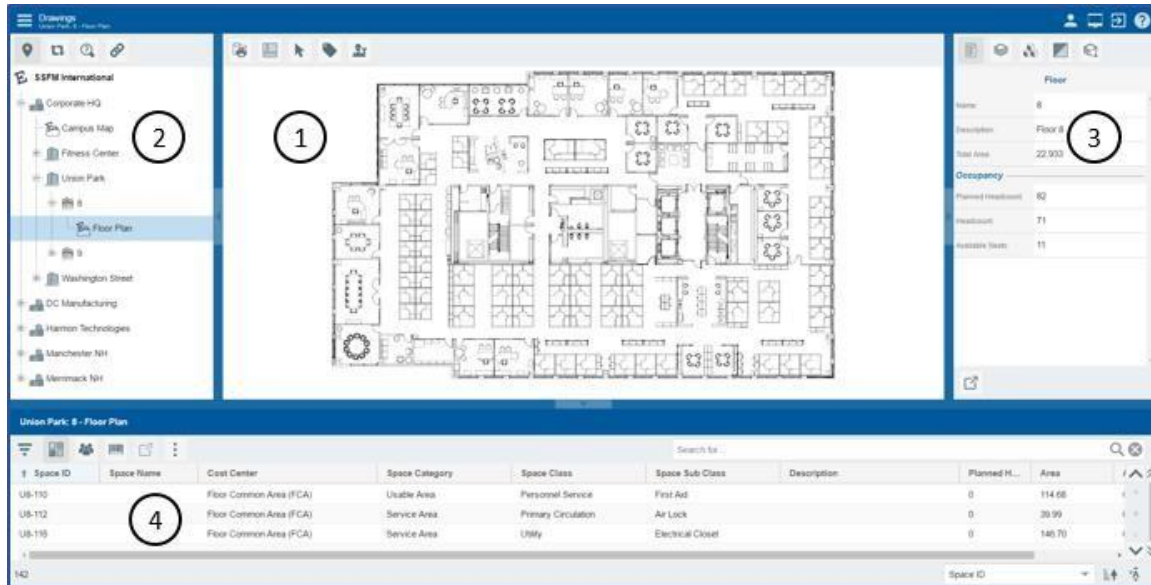
## The Drawing Viewer Interface

The Evolve FM Drawing Viewer is used to display drawings, and to manage data related to them.

### To Display the Drawing Viewer

1. On the [Applications Menu](#), click Drawings.

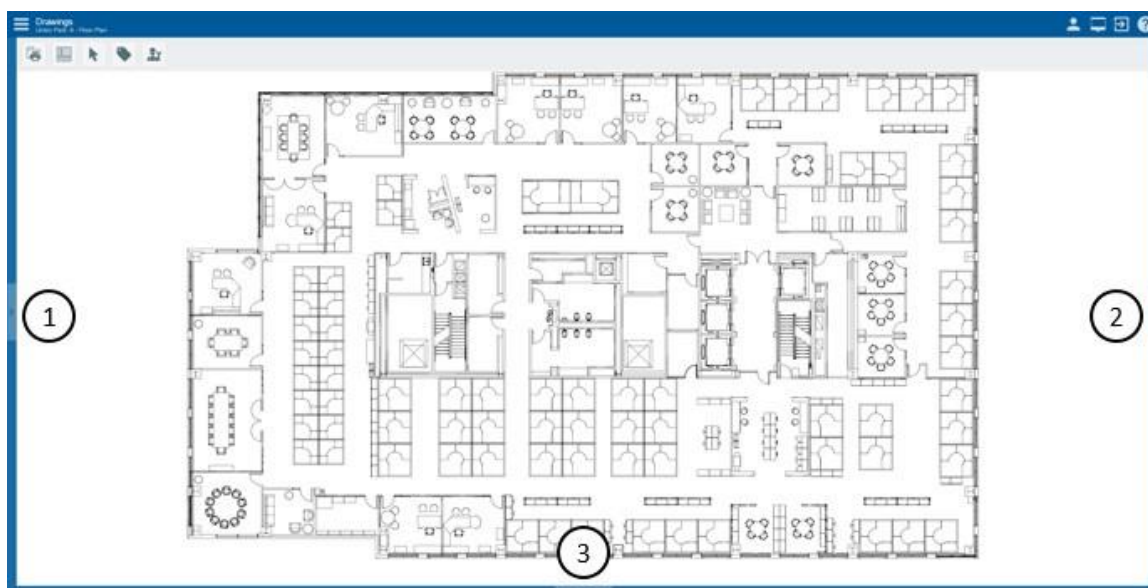
## The Four Main Components



ITEM	CONTROL	DESCRIPTION
1	Viewer	The drawing display area.
2	Drawing Navigator Panel	Contains four function panes that are used with the Viewer: Drawing Navigator, Moves, Search Drawings, and Manage Links.
3	Drawing Options Panel	Contains five function panes that are used with the Viewer: Attributes, Layers, Objects, Themes, and Plan Views.
4	Drawing Grids	Contains three data grids: Space, Assets, and Occupants.

## The Viewer

Using the hide/show panel controls, the Drawing Navigator panel (1), Options panel (2), and the Drawing Grids (3), can be hidden to maximize the Viewer area.

**MAXIMIZED VIEWER****Viewer Menu**

\*the Maintenance Menu is not available to use in SIMS

The functions available with each of the five menu icons are described below.

1: FILE OPTIONS MENU	
Edit Attributes	Click to open the <a href="#">Drawing record dialog</a> related to the drawing in the Viewer.
Open DWF	Download and/or open the DWF file related to the drawing in the Viewer. The Autodesk DWF viewer is required to open the file (a free download is available at Autodesk.com).
Print Drawing	This option will print the entire drawing image.
Print View	This option will print the drawing area visible in the Viewer. TIP: Do not use this option to print the entire drawing image, instead use the Print Drawing option.
Get Image	This option will produce an image file of the drawing area visible in the Viewer. Right-click on the image file and choose Copy Image, to copy the image to the clipboard. Paste into any document or email.
Reports	Opens the Select Report dialog. Select one of your drawing report formats, and then click Preview to produce the report.
2: WORKSPACE MENU	
Hide/Show Drawing Navigator	Click to Hide/Show the Drawing Navigator Panel.
Hide/Show Drawing Options	Click to Hide/Show the Drawing Options Panel.
Hide/Show Drawing Grids	Click to Hide/Show the Drawing Grids Panel.
3: DRAWING TOOL MENU    TIP: A right-click in the Viewer will also show these tools	

Select	Sets the cursor to Select mode, enabling selection of drawing objects.
Pan	Sets the cursor to Pan mode, used to move the drawing image in the Viewer.
Zoom Window	Zooms to an area, defined by a rectangular selection window, in the Viewer.
Zoom In	Enlarges the image size displayed in the Viewer.
Zoom Out	Decreases the image size displayed in the Viewer.
Zoom All	Displays the entire drawing image within the Viewer.
Auto-Zoom	Automatically zooms to an object selected on the drawing.
<b>4: LABEL MENU</b>	
Labels On	Shows object labels on the drawing.
Labels Off	Hides object labels on the drawing.
Edit Labels	Enables the ability to edit the location and size of a label on the drawing.
Reset Label	Resets an object label(s) back to its original size and location.
Manage Labels	Opens the Manage Labels dialog, which is used to create & edit label styles.
<b>5: MAINTENANCE MENU</b> NOTE: Requires the Operations & Maintenance Module	
Service Request	Use to submit a work request.
Work Order	Opens the Work Order dialog, used to create a work order.
Move In	Use to submit a Move In request.
Move Out	Use to submit a Move Out request

## The Drawing Navigator Panel

The Drawing Navigator panel, located on the left side of the Viewer, includes four function panes that are used with the Viewer.

- Drawing Navigator Pane
- Moves Pane
- Search Drawings Pane
- Manage Links Pane

### Drawing Navigator Menu

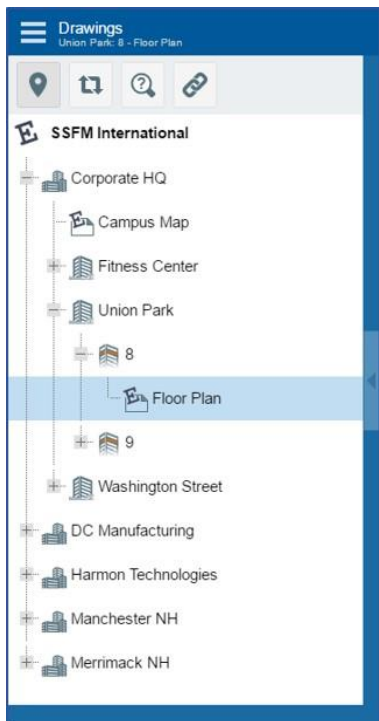
The Drawing Navigator menu, is used to show each function pane of the Drawing Navigator panel.



\*the Moves and Manage Links buttons are not available in SIMS

ITEM	CONTROL	DESCRIPTION
1	Drawing Navigator	Shows the Drawing Navigator pane.
2	Moves	Shows the Moves pane.
3	Search Drawings	Shows the Search Drawings pane.
4	Manage Links	Shows the Manage Links pane.

## The Drawing Navigator Pane






The leading pane of the Drawing Navigator panel, is its namesake, the Drawing Navigator pane.

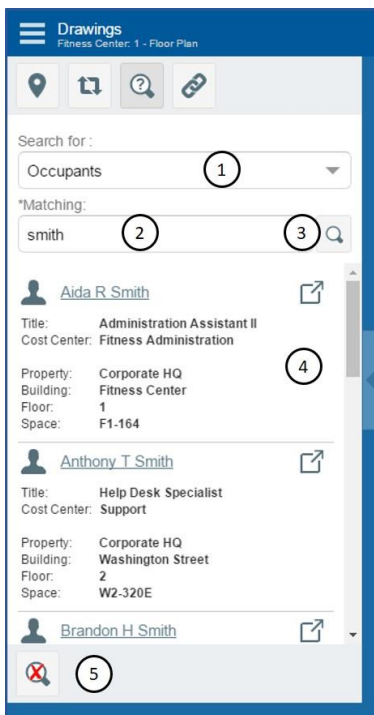
The Drawing Navigator pane is a location tree list that is used to navigate to your drawings in Evolve FM.

Data related to the location selected in the tree list, will populate the Options panel, the Drawing Grid panel, and if the selection is a drawing file, the drawing graphics will display in the Viewer.

### Drawing Navigator Controls

- Use the  expand control to expand locations in the list, and the  collapse control to hide locations in the list.
- Select a location in the tree list to see its related data in the Options panel, the Drawing Grids panel, and to display a drawing file in the Viewer.
- Drawing files are identified by the Evolve drawing symbol .

## The Search Drawings Pane



The Search Drawings pane can be used to search for drawings, spaces on a drawing, and occupants and assets that are assigned to spaces on a drawing.

ITEM	CONTROL	DESCRIPTION
1	Search Scope	Defines what data records to find; Drawings, Spaces, Occupants, or Assets.
2	Search Criteria	Defines what data to find.
3	Find	Executes the search.
4	Search Results	Shows all data records found in the search.
5	Clear	Clears the search.



## The Drawing Options Panel

The Drawing Options panel, located on the right side of the Viewer, contains five function panes that are used with the Viewer.

- Attributes Pane
- Layers Pane
- Objects Pane
- Themes Pane
- Plan Views Pane

The Options menu is used to show each pane on the panel.

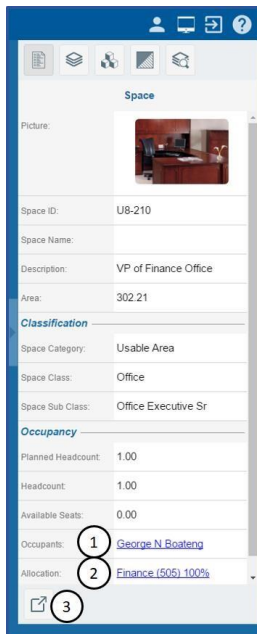
### Drawing Options Menu



\*Most OSU SIMS users will not have the Objects or Plan Views buttons

ITEM	CONTROL	DESCRIPTION
1	Attributes	Shows the Attributes pane.
2	Layers	Shows the Layers pane.
3	Objects	Shows the Objects pane.
4	Themes	Shows the Themes pane.
5	Plan Views	Shows the Plan Views pane.

### The Attributes Pane

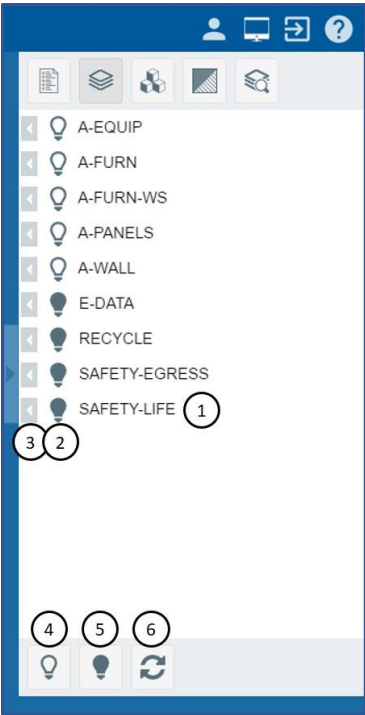


The Attributes pane shows data related to an item selected in either the Drawing Navigator tree list, in the Drawing Grids, or in the Viewer.

The data attribute fields on the pane are read-only, other than the Occupants and Attributes hyperlinks, which can be used to open their respective dialogs.

ITEM	CONTROL	DESCRIPTION
1	Occupants	The occupant hyperlink, opens the Space Occupant dialog when clicked.
2	Allocation	The allocation hyperlink, opens the Allocation dialog when clicked. This link can be used to change the allocation percentage assigned to a selected object.
3	Open Record	Opens the data record of a selected object.

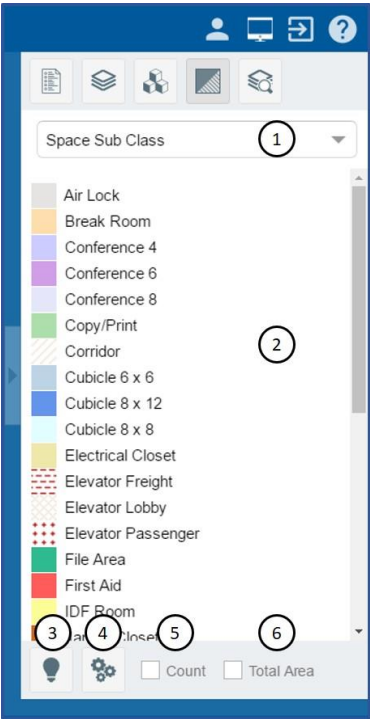
The Layers Pane



The Layers pane contains a list of drawing layers related to the drawing displayed in the Viewer. Use these controls to show or hide layers in the Viewer.

ITEM	CONTROL	DESCRIPTION
1	Layer	Drawing layer name.
2	Load/Unload	Click to turn a layer On/Off in the Viewer. Light = ON, Dark = OFF
3	Isolate Layer	Click to isolate a layer (turns off all layers but that layer). Click again to unisolate that layer.
4	Load All	Click to show all layers in the Viewer.
5	Unload All	Click to hide all layers in the Viewer.
6	Reset	Click to reset the layer settings to the drawing's default layer state, as set on the <a href="#">Drawing record dialog</a> .

The Themes Pane



The Themes pane is used to color spaces displayed in the Viewer, based on space criteria data defined in a theme. When a theme is applied to a drawing, the Themes pane populates with a legend key.

ITEM	CONTROL	DESCRIPTION
1	Theme List	A selection list of themes that can be applied to spaces on a drawing.
2	Legend Key	The legend key for the selected theme shows: - Color/Hatch highlighted on the drawing. - Attribute data related to the color/hatch.
3	Clear Theme	Clears the colors from the drawing.
4	Manage Themes	Opens the Manage Themes dialog, which is used to create user defined themes.
5	Count	Select to show the record count related to each key item in the legend.
6	Total Area	Select to show the total area related to each key item in the legend.

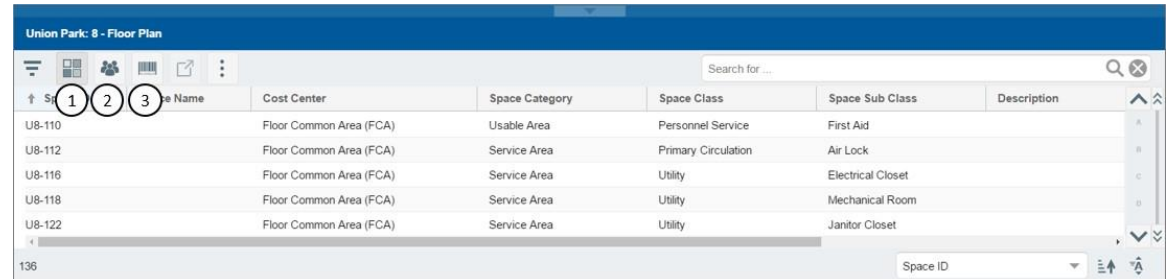
## The Drawing Grids

Drawing Grids show the data records related to the item selected on the [Drawing Navigator pane](#). Use the grid search controls to filter data, and when the grid is displayed in Grid View, you can utilize the Grid View controls to layout the grid columns, and to create and save user defined grid views.

### Data Scope

The grid will populate with Space, Occupant, or Assets records, based on the grid's selected data scope.

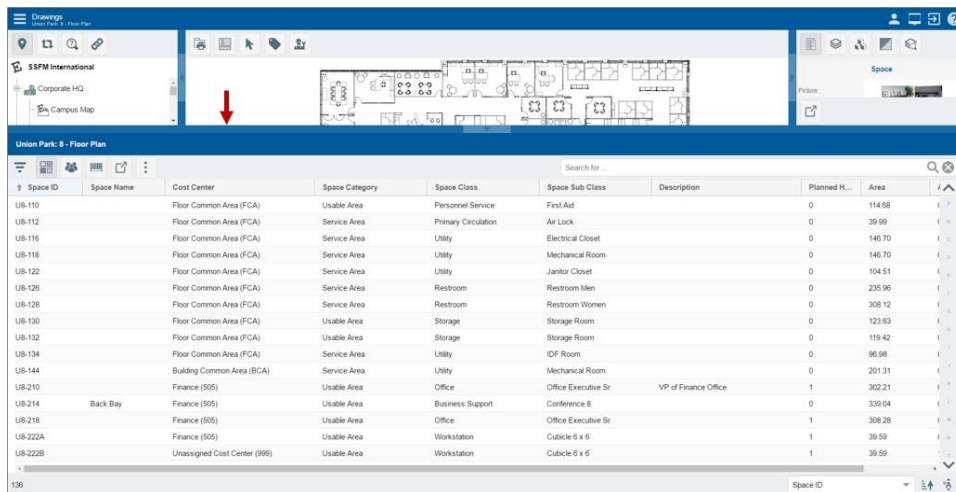
#### DRAWING GRID, DATA SCOPE ICONS



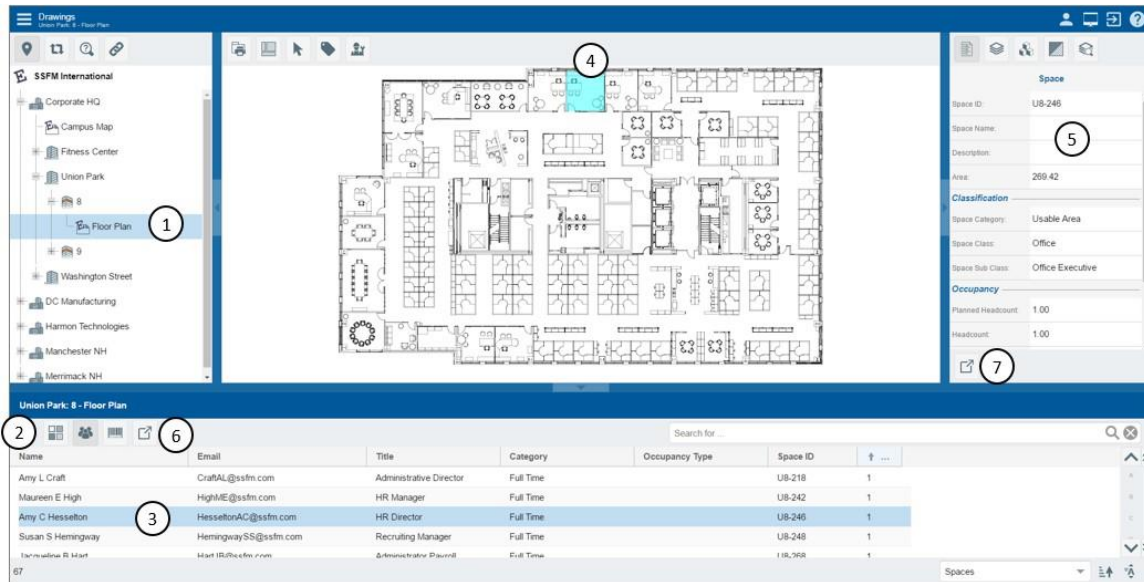
ITEM	CONTROL	DESCRIPTION
1	Spaces	Populates the grid with Space records, that are linked to Drawing records, related to the item selected on the Drawing Navigator pane.
2	Occupants	Populates the grid with Occupant records, that are assigned to linked drawing space records, related to the item selected on the Drawing Navigator pane.
3	Assets	Populates the grid with Asset records, that are assigned to linked drawing asset records, related to the item selected on the Drawing Navigator pane.

### Resize the Grid

You can resize the Drawing Grid by dragging its upper edge.



## How to Use the Drawing Grids



1. Select an item on the Drawing Navigator pane.
2. Select a data scope (Spaces or Occupants) on the grid menu bar.
3. Select a record in the grid list.
4. When a drawing is displayed in the Viewer, the selected record will highlight on the drawing.
5. Data related to the selected record will show on the Attributes pane.
6. Click the Open record control on the Drawing Grid, to open the selected record's dialog. Use this dialog to edit data related to the selected record.

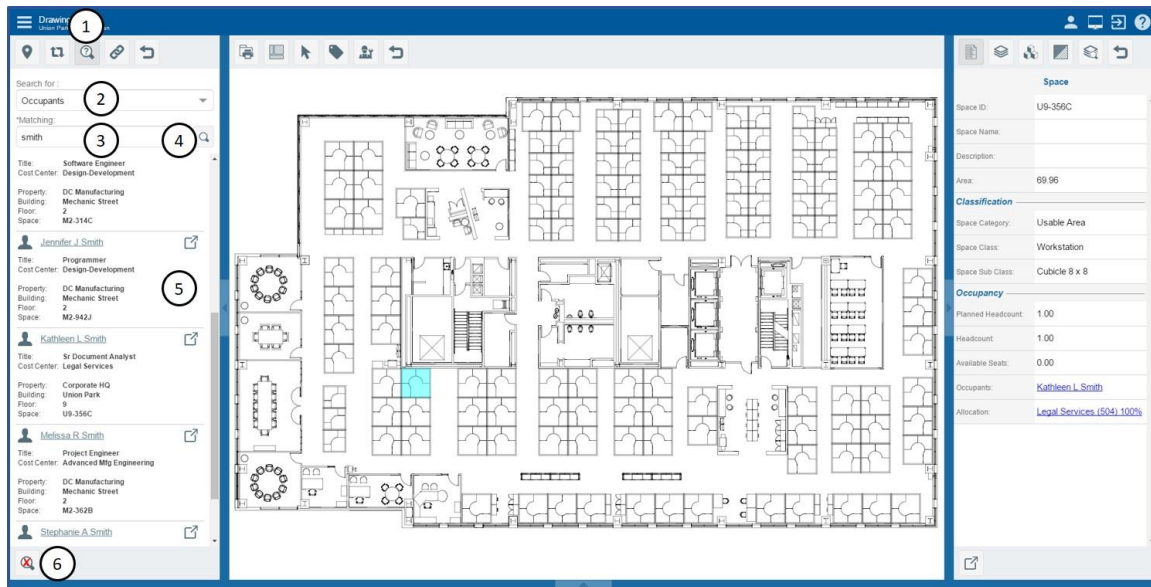
**NOTE!** A double-click on the selected record will also open the record's dialog.




7. Clicking the Open record control on the Attributes pane, with multiple records selected in the grid, will open the Multi-Edit dialog. Use this dialog to bulk edit the selected records.

# How to Use Search Drawings

## SEARCH DRAWINGS



1. On the Drawing Navigator panel, click  Search Drawings to display the Search Drawings pane.
2. In the Search for selection list, select the data set for your search.
3. In the Matching textbox, enter the text to be queried.

### NOTE!



A selection list may be provided after the fourth character is entered. Make a selection from this list if you are searching for a specific object.

4. Click Find.
5. In the search results list, do either of the following:
  - Click the Open Drawing hyperlink to load the related drawing in the Viewer, and highlight the object on the drawing. The Attributes pane will show data related to the object selected on the drawing.
  - Click the Open record control to open the object's data record dialog.
6. Click the Clear Search Results control to clear the search.

## Chapter 1.4: Drawing Labels






## About Drawing Labels

Drawing labels are used to display text related to the objects on a drawing.

### Label Controls



The Label controls located on the Viewer menu, are used to work with your drawing labels. Some of the controls when applied, affect all users at a global level, while other controls affect only the current user logged in at the time of their use.

CONTROL	LEVEL	DESCRIPTION
 Labels On	User	Shows object labels on the drawing.
 Labels Off	User	Hides object labels on the drawing.
 Edit Labels	Global	Enables the ability to edit the location & size of a label on the drawing.
 Reset Label	Global	Resets a label(s) on the drawing to its original size and location.
 Manage Labels	User	Opens the Manage Labels dialog, used to create & edit label styles.

### Label Style, Permissions, & Scale Factor

Label styles, label permissions, and label scale factors, all have a role in how labels are displayed on a drawing in Evolve FM.

#### Label Styles

Label styles control the look, the font, and the attribute data displayed when labels are turned on in the Viewer. System Label styles are provided as the Evolve FM default label styles; however, you may also create user defined label styles in Evolve FM.

##### ***System Label Styles***

Space and asset objects are the most common objects found on a drawing, but drawings may also include property, building, and floor objects. For each object type, Evolve FM provides a system label style.

The system label styles are available for use by all users, but they cannot be edited or removed.

OBJECT TYPE	SYSTEM DEFAULT LABEL STYLE NAME
Property	Default Property
Building	Default Building
Floor	Default Floor
Space	Default Space
Asset	Default Asset

### ***User Defined Label Styles***

User defined label styles are created and saved at the user level in Evolve FM, therefore when a user creates a label style it can be viewed, edited, or removed by that user only. The Label Styles tab, located on the Manage Labels dialog is used to create and save user defined label styles.

### **Label Availability**

By default, system label styles are enabled and useable by all users, and user defined label styles are enabled and usable only to the user that created them. The controls located in Platform Administration > Drawings > Labels, allow some adjustment to that level of access, as outlined in the table below.

ACCESS LEVEL	DESCRIPTION
Public Label	Gives use of a label style to all users.
Private Label	Gives use of a label style only to the user who created it.
Enabled	Makes the label style available for use based on its Public/Private state.
Disabled	Makes the label style unavailable for use regardless of its Public/Private state.

### **Label Scale Factor**

There are times when a label style looks great when displayed on most drawings, but it appears too small or too large on a specific drawing. A label scale factor can be set on the [Drawing record dialog](#) to adjust for this situation.

Evolve FM will scale the label font size, set in all label styles displayed on that drawing, by the value set on the Drawing record dialog.

#### ***Example***

- A label scale of 2 will show label text 2x the font size set in a label style.
- A label scale of .5 will show label text 1/2 the font size set in a label style.

#### ***To Change a Drawing Record's Label Scale***

1. Display the drawing in the Viewer.
2. On the Viewer menu, click File Options, and then click Edit Attributes.
3. On the Attributes tab of the Drawing record dialog, in the Label textbox, enter the new scale.

## **The Manage Labels Dialog**

The Manage Labels dialog is used to set your Drawing Viewer default label styles, and to add, edit, and remove your user defined label styles.

### **Defaults Tab**

The five object selection lists (Property, Building, Floor, Space, Asset), located on the Defaults tab, are used to set a default label style for each object type. The label styles selected here define the text label appearance that will be used in the Drawing viewer.



## 1.4 Drawing Labels

**NOTE!** Default label styles are set at the user level in Evolve FM, therefore the default label styles a user selects here, controls the text label appearance in the Drawing Viewer for that user only.

The Evolve FM systems label styles are preconfigured on the Details tab, and user defined label styles are available for selection in the object selection lists, based on their label availability setting configured in Platform Administration > Drawings > Labels.

### MANAGE LABELS DIALOG, DEFAULTS TAB

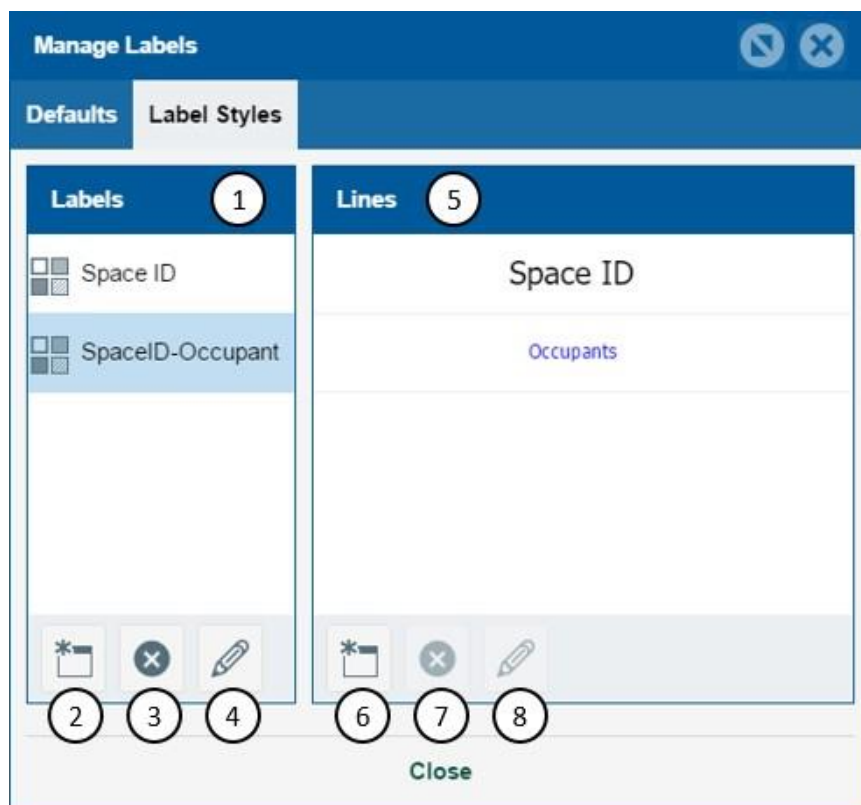
The screenshot shows the 'Manage Labels' dialog box with the 'Defaults' tab selected. The dialog has a blue header bar with the title 'Manage Labels' and a close button. Below the header bar are two tabs: 'Defaults' and 'Label Styles'. The 'Defaults' tab contains five dropdown menus, each with a red asterisk indicating a required field. The dropdowns are labeled 'Property\*', 'Building\*', 'Floor\*', 'Space\*', and 'Asset\*', and each has a default value: 'Default Property', 'Default Building', 'Default Floor', 'Default Space', and 'Default Asset' respectively. A 'Close' button is located at the bottom right of the dialog.

### Label Styles Tab

The Label Styles tab, on the Manage Labels dialog, is used to create your user defined label styles.

The dialog is split into two groups, the Labels group, which is used to manage your label styles, and the Lines group, which is used to configure the lines of text related to each of your label styles.

MANAGE LABELS DIALOG, LABEL STYLES TAB



ITEM	CONTROL	DESCRIPTION
1	Labels Group	A list of your user defined label styles, and the Labels group menu controls (2-4).
2	Add (style)	Click to add a new label style.
3	Remove (style)	Click to remove the selected label style.
4	Edit (style)	Click to edit the selected label style.
5	Lines Group	The lines of text in a selected style, and the Lines group menu controls (6-8).
6	Add (text line)	Add a new line of text to the selected label style.
7	Remove (text line)	Remove the selected line of text.
8	Edit (text line)	Edit the selected line of text.

## Working with Drawing Labels

### Turn Labels On/Off

#### *To Show Labels on a Drawing*

1. On the Viewer Menu, click Labels.
2. Click Labels On.

***To Hide Labels on a Drawing***

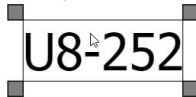
1. On the Viewer Menu, click Labels.
2. Click Labels Off.

**Move & Resize Labels**

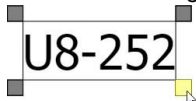
The Edit Labels control is used to move a label on a drawing from its current location to a new location, and to resize the label to better fit its current location.

***To Move a Label***

1. On the Viewer Menu, click Labels.
2. Click Edit Labels.
3. Select the label on the drawing.
4. With your pointer inside the label's bounding box, drag the label to its new location.

***To Resize a Label***

1. On the Viewer Menu, click Labels.
2. Click Edit Labels.
3. Select the label on the drawing.
4. Select a bounding box grip, drag to increase or decrease the size of the label.

**Reset a Label Location**

The Reset Label control is designed to reset a label, related to one selected drawing object, back to the object's original location, and to resize the label to its size set in the active label style in use in the Viewer.

***To Reset a Label***

1. In the Viewer, select the space(s), or another object(s), that needs its label reset.
2. On the Viewer Menu, click Labels.
3. Click Reset Label.

**Set Your Default Label Styles**

1. On the Viewer menu, click Labels, and then click Manage Labels.

2. On the Defaults tab of the Manage Labels dialog, select a default label style for each object type (Property, Building, Floor, Space, Asset).
3. Click Close.

**NOTE!** The default label styles set here, are specific to the user login that set them.



## Create a New Label Style

1. On the Viewer Menu, click Labels, and then click Manage Labels.
2. Click the Label Styles tab.
3. On the Labels menu, click Add.

### ***Define the label type and name:***

4. Select the type of object that will display this label (Space, Asset, etc.).
5. Enter the name to be used for this label style.
6. Click Save.

### ***Build each line of text in the label:***

7. In the Labels group, select the label style just created.
8. On the Lines menu, click Add.
9. In the Attribute selection list, select the data attribute to be used in this line of text.  
Example: Space ID will add the Space ID text to each label.
10. Optional:
  - Prefix: Text entered here will be used to prefix the Attribute text on the label.
  - Suffix: Text entered here will be used to suffix the Attribute text on the label.
11. In the Font selection list, select a text font for this line of text.
12. In the Sort order textbox, enter the line position of this text. Example: 1 = First line of text, 2 = Second line of text, etc.

**NOTE!** If more than one line of text is used in a label style, and the sort order is not defined for each line of text, the label display on the drawing will produce random line order results.



13. In the Size textbox, enter the font size to be used on this line of text.
14. In the Color selection list, select a color to be used on this line of text.
15. Optional: In the Zoom textbox, enter a zoom display factor for this line of text.

**NOTE!** A zoom factor of 0 (zero) will make the line of text visible at all times when displayed on a drawing, whereas a zoom factor of 90 will require the user to zoom closer into a drawing area before the line of text will be visible.



16. Click Save.

17. Repeat steps 8-16 to add another line of text to the label style.

## **Edit/Delete a Label Style**

1. On the Viewer Menu, click Labels, and then click Manage Labels.
2. Click the Label Styles tab.
3. In the Labels group, select the label style to be edited.
4. On the Labels menu, click Edit.
5. Change the label Type or Name as needed.
6. Click Save.

### ***Delete a Label Style***

1. In the Labels group, select the label style to be deleted.
2. On the Labels menu, click Remove.

### ***Edit the Lines of Text in a Label Style***

1. In the Labels group, select the label style to be edited.
2. In the Lines list, select the line of text to be edited.
3. On the Lines menu, click Edit.
4. Edit the format data for the text line as needed.
5. Click Save.

### ***Delete a Line of Text in a Label Style***

1. In the Labels group, select the label style to be edited.
2. In the Lines list, select the line of text to be removed.
3. On the Lines menu, click Remove.

## Chapter 1.5: Drawing Themes

## About Drawing Themes

Drawing themes are used to color-code spaces on a drawing based on search criteria defined in a stored theme. The [Themes pane](#), located on the Drawing Options panel of the Drawing Viewer, is used to apply themes to drawings in the Viewer, and to create and manage user defined drawing themes.


### Theme Attributes

The Evolve FM Space data attributes are used in drawing themes, allowing a user to highlight spaces on a drawing based on the space related data assigned to the Evolve FM space records.

### Theme Type

#### System Themes

There is a preconfigured system theme in Evolve FM for all Space data attributes. The system themes are available for use by all users, but they cannot be edited or removed. System themes can be identified by the system theme icon.


ICON	THEME TYPE
	System Theme.

#### User Defined Themes

User defined themes are created and saved at the user level in Evolve FM, and can remain private to the user who created them, or they can be made public so that all users have access to them.


##### *Private Themes*

By default, all user defined themes are private to that user only, meaning they can be viewed, edited, or removed by that user only. User defined private themes can be identified by the private theme icon.

ICON	THEME TYPE
	User defined, PRIVATE theme.

##### *Public Themes*

User defined public themes can be viewed by all users, but can be edited or removed only by the user that created them. User defined public themes can be identified by the public theme icon.

ICON	THEME TYPE
	User defined, PUBLIC theme.

### Theme Scale Factor

There are times when theme hatch patterns look great when displayed on most drawings, but they appear too small or too large on a specific drawing. A theme scale factor can be set on the [Drawing record dialog](#) to adjust for this situation.

Evolve FM will scale the theme hatch size, in all themes displayed on that drawing, by the value set on the Drawing record dialog.

**Example**

- A theme scale of 2 will show theme hatch 2x the default size.
- A theme scale of .5 will theme hatch 1/2 the default size.

**To Change a Drawing Record's Theme Scale**

1. Display the drawing in the Viewer.
2. On the Viewer menu, click File Options, and then click Edit Attributes.
3. On the Attributes tab of the Drawing record dialog, in the Theme textbox, enter the new scale.

## User Defined Themes

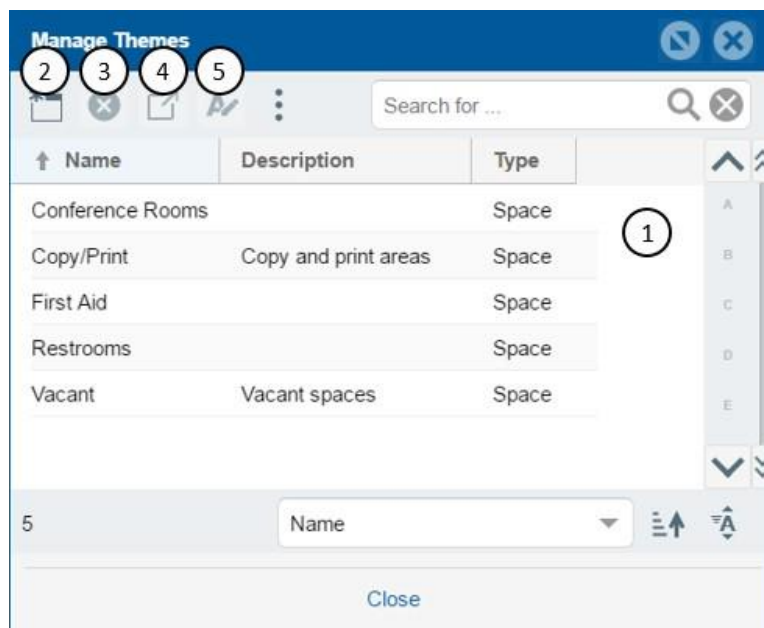
User defined themes are created and managed at the user level in Evolve FM. They can be viewed, edited, and removed by that user only, however the controls located in Platform Administration > Drawings > Themes, can be set to make user defined themes available for use by all users.

## The Manage Themes Dialog

The Manage Themes dialog is used to create user defined themes in Evolve FM. The dialog is accessed using the Manage Themes control, located on the [Themes pane](#).

All drawing themes created by the user are listed in the Manage Themes grid list. The grid menu controls are used to add, edit, and remove, a user's drawing themes.

**MANAGE THEMES DIALOG**





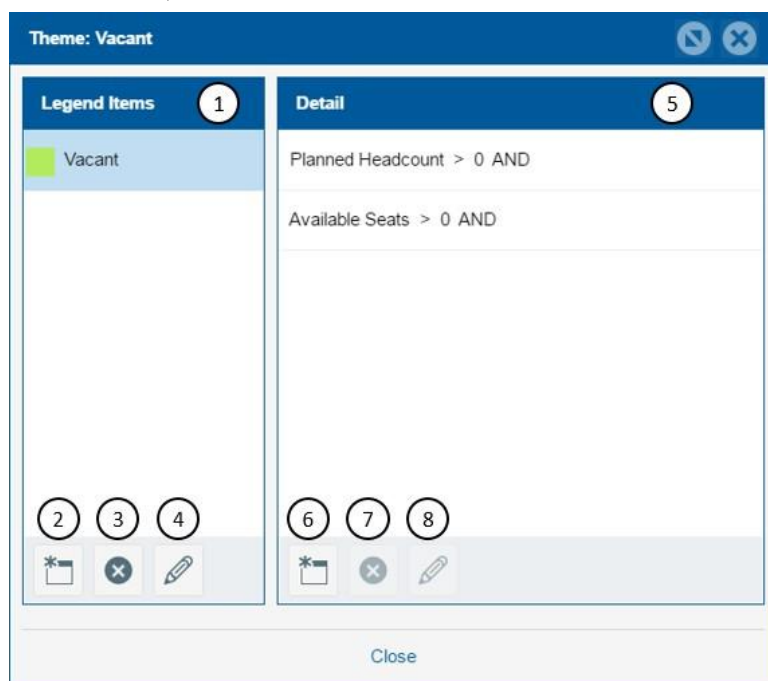
ITEM	CONTROL	DESCRIPTION
1	Theme Grid	A list of drawing themes created by the user.
2	Add	Click to add a new theme.
3	Remove	Click to remove a selected theme.
4	Open	Click to open the Legend Builder dialog for a selected theme.
5	Edit Name	Click to edit the Name or Description of a selected theme.

## Legend Builder Dialog

The Legend Builder dialog is used to configure the legend key, and the related search criteria, to be used in a drawing theme.

The dialog is split into two groups, the Legend Items group, which is used to manage the legend key items displayed in the drawing theme legend, and the Detail group, which is used to configure the search criteria for each legend key item.

### MANAGE THEMES, THEME BUILDER DIALOG



ITEM	CONTROL	DESCRIPTION
1	Legend Items Group	A list of legend key items, and the Legend Items group menu controls (2-4).
2	Add (key)	Click to add a new key item to the legend.
3	Remove (key)	Click to remove a selected key item.
4	Edit (key)	Click to edit a selected key item.
5	Detail Group	Search criteria in a selected key item, and the Detail group menu controls (6-8).
6	Add (detail)	Add a new search criteria statement to a selected legend key.

7	Remove (detail)	Remove a selected search criteria statement.
8	Edit (detail)	Edit a selected search criteria statement.

## About Search Criteria Statements

The image below illustrates a two-line search criteria statement configured in the Detail group.



When the search is executed, Evolve FM will process the search criteria one line at a time, first to last, to qualify data that meets the criteria set in the statement.

Each line of a search criteria statement is comprised of the following items:

CONTROL	NOTE
Space Data Attribute	The space data attribute to be used in the search.
Operator	The operator to be assigned to the Value of the attribute.
Value	The attribute's data value to be used in the search.
Connector	A relational operator (AND or OR) to connect each line of the search criteria statement. - The AND operator displays a record if all the conditions separated by AND is TRUE. - The OR operator displays a record in any of the conditions separated by OR is TRUE.

## About Relational Operators

Search criteria relational operators are used to link the space data Attribute to the Value.

OPERATOR	DESCRIPTION	CRITERIA DATA TYPE
<	Less than	Numeric
<=	Less than or equal to	Numeric
<>	Not Equal to	Alphanumeric
=	Equal to	Alphanumeric
>	Greater than	Numeric
>=	Greater than or equal to	Numeric
Like	Match a portion of the Value	Use the LIKE operator with the wildcard symbol % (percent) added to the Value field. Examples: <ul style="list-style-type: none"> <li>• LIKE office% will find data beginning with the word "office".</li> <li>• LIKE %office will find data ending with the word "office".</li> <li>• LIKE %office% will find data containing the word "office".</li> </ul>

## Working with Drawing Themes

### Turn a Theme On/Off

#### *To Show a Theme on a Drawing*

1. Display a drawing in the Viewer.
2. On the [Drawing Options panel](#) menu, click Themes.
3. On the Themes pane, in the Select Theme list, select a theme to show on the drawing.

#### *To Clear a Theme from a Drawing*

3. On the Themes pane, click Clear Themes.

### Change the Legend Key Color or Hatch Pattern

1. Turn a theme on in the Viewer.
2. On the Themes pane, in the [Legend Key](#), click the color swatch to be edited.
3. On the Theme dialog, change the color/pattern as needed.
4. Click Save.

#### IMPORTANT!



Changing the legend key color/hatch on system themes, and on public user defined themes, applies the change for all users.

### Add the Key Count / Area to the Legend

1. Turn a theme on in the Viewer.
2. On the Themes pane, do the following:
  - Select the Count checkbox to show the instance count related to each key item in the legend.
  - Select the Area checkbox to show the total area related to each key item in the legend.
3. On the Theme dialog, change the color/pattern as needed.
4. Click Save.

### Create a User Defined Theme

1. On the [Themes pane](#), click the Manage Themes control.
2. On the Manage Themes dialog, click Add.

3. Enter the name of your theme.
4. Optional: Enter a description of your theme.
5. Click Save.

***Build the legend key***

6. In the Theme grid, select your theme name.
7. Click Open.
8. On the Legend Items menu, click Add.
9. Enter a name for this key item.
10. Optional: Enter a description of this key item.
11. Select a hatch pattern.
12. Select a hatch color.
13. Click Save.

***Build the search criteria statement***

14. In the Legend Items group, click the legend key item to be configured.
15. In the Detail group menu, click Add.
16. Select the space data Attribute to be used as the search data set.
17. Select the search Operator.
18. Enter the data Value to be searched.
19. In the Connector field, do one of the following:
  - Leave the default Operator AND if creating a one-line statement.
  - Select the AND or the OR Operator to connect the next line in a multi-line statement.
20. Click Save.
21. Repeat steps 15-20 for each additional line in your search criteria statement.
22. Repeat steps 8-21 to add additional Legend Key items to your theme.
23. Click Close

## **Edit/Delete a User Defined Theme**

***Edit the Name of the Theme***

1. On the [Themes pane](#), click the Manage Themes control.
2. In the Themes grid, click the theme to be edited.
3. On the Themes grid menu, click Edit.
4. Edit the name of the theme.
5. Click Save.

***Delete a Theme***

1. On the [Themes pane](#), click the Manage Themes control.

2. In the Themes grid, click the theme to be deleted.
3. On the Themes grid menu, click Remove.

**Edit a Legend Key Item Name, Color, or Hatch Pattern.**

1. On the Themes pane, click the Manage Themes control.
2. In the Themes grid, click the theme to be edited.
3. On the Themes grid menu, click Open.
4. In the Legend Items group, select the key to be edited.
5. On the Legend Items group menu, click Edit.
6. Edit the Name, Pattern, or Color as needed.
7. Click Save.

**Delete a Legend Key Item**

1. On the Themes pane, click the Manage Themes control.
2. In the Themes grid, click the theme to be edited.
3. On the Themes grid menu, click Open.
4. In the Legend Items group, select the key to be deleted.
5. On the Legend Items group menu, click Remove.

**Edit a Search Criteria Statement.**

1. On the Themes pane, click the Manage Themes control.
2. In the Themes grid, click the theme to be edited.
3. On the Themes grid menu, click Open.
4. In the Legend Items group, select the key to be edited.
5. In the Detail group, select the search criteria line to be edited.
6. On the Detail group menu, click Edit.
7. Edit the search criteria as needed.
8. Click Save.

**Delete a Search Criteria Statement**

1. On the Themes pane, click the Manage Themes control.
2. In the Themes grid, click the theme to be edited.
3. On the Themes grid menu, click Open.
4. In the Legend Items group, select the key to be edited.
5. In the Detail group, select the search criteria line to be removed.
6. On the Detail group menu, click Remove.
7. Click Close.

## Chapter 1.7:

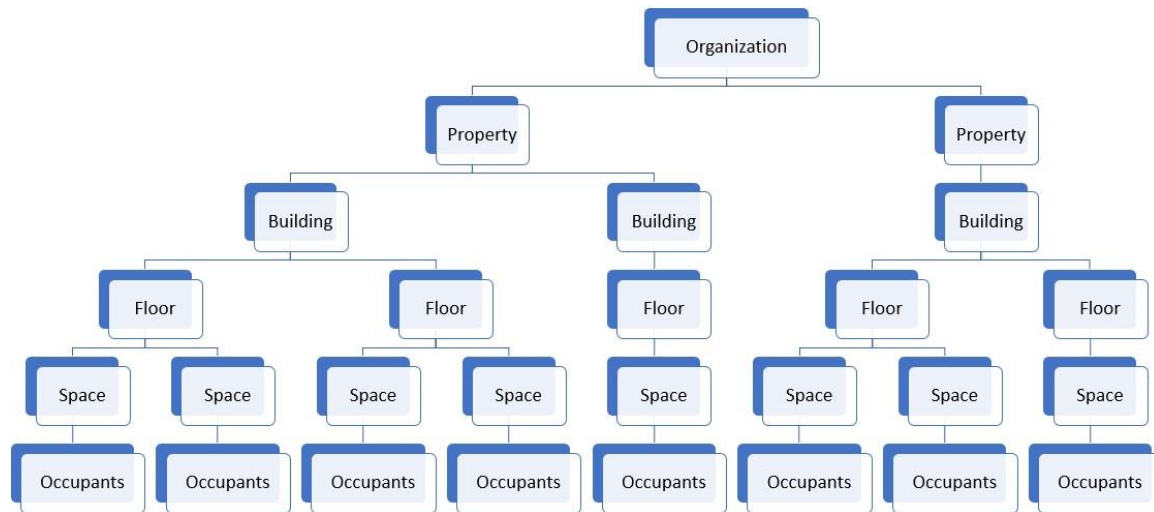
### Properties, Buildings, Floor, & Space

## The Evolve FM Space Structure

The space structure in Evolve FM is organized into a hierarchy. The Organization is the root of the hierarchy, and is managed from within the Evolve FM Platform Administration module.

In Evolve FM, an organization may encompass many Properties. On those Properties, there may be many Buildings. Buildings may contain many Floors, and on those, there may be many Spaces. Occupants are assigned to spaces.

In an atypical use of the space structure, spaces may be assigned to properties and buildings.



## Properties

The Property level in the Evolve FM space structure is typically a campus, a real estate location, land, etc. It may or may not have buildings associated with it.

All properties created in Evolve FM are automatically associated with the Organization.

### ***Property Examples***

- A campus
- An office complex
- A specific street address
- A park

## Properties Application Grid

The Properties application grid is designed to manage your Property data records stored in the Evolve FM database.

**To Open the Properties Grid**

- 1. Click the [Applications menu](#), and then click Space.
- 2. On the grid page bar, click Properties.
- 3. Use the Application Grid tools to Open Property data records.

**PROPERTIES APPLICATION GRID**

Property ID	Name	Description	Type	Total Area	Address	City	State
	Corporate HQ		Property	119,232.00		Boston	MA
	DC Manufacturing		Property	76,336.00	10 Mechanic Street	Worcester	MA
	Harmon Technologies		Property	16,036.00		Philadelphia	PA
	Manchester NH		Property	51,794.00	160 Canal Street	Manchester	NH
			Property			Merrimack	NH

**Property Dialog**

The Property dialog is used to manage individual Property data records in the Evolve FM database.

**Property: Corporate HQ**

Attributes | Picture | Contacts | Documents | Work Orders

Property ID:  Total Area: 119,232

Name\*:  Corporate HQ Occupancy:

Description:  Planned Headcount: 396

Headcount: 363

Detail:

Address:

Save Cancel

ATTRIBUTES	DESCRIPTION
	Opens Google Maps to the location defined in the Address-Country dialog fields.
Property ID	Optional field to capture data.
Name	REQUIRED. The name of the property. This name should be unique for each property within the organization.



Description	Optional field to capture data.
Address	Optional field to capture data.
City	Optional field to capture data.
State	Optional field to capture data.
Postal Code	Optional field to capture data.
Country	Optional field to capture data.
Phone	Optional field to capture data.
Fax	Optional field to capture data.
Web Address	Optional field to capture data.
Total Area	READ-ONLY. Total area of the property. Calculated using the sum of the Total Area of each building within the property.
Planned Headcount	READ-ONLY. Total planned headcount within the property. Calculated using the sum of the Planned Headcount in each building within the property.
Headcount	READ-ONLY. Total headcount within the property. Calculated using the sum of the Headcount in each building within the property.
OTHER	DESCRIPTION
<a href="#">Picture Tab</a>	Use to attach pictures to the data record.
<a href="#">Contacts Tab</a>	Use to assign contacts to the data record.
<a href="#">Documents Tab</a>	Use to attach documents to the data record.
Work Orders Tab	The Operations & Maintenance Module is required for Work Orders.

## Buildings

The Building level in the Evolve FM space structure is typically a structure at a specific address, however it may be land, or another entity associated with a Property. It may or may not have floors associated with it.

All buildings created in Evolve FM must be assigned to a property.

### ***Building Examples***

- A building
- A grounds shed
- A parking lot
- Land

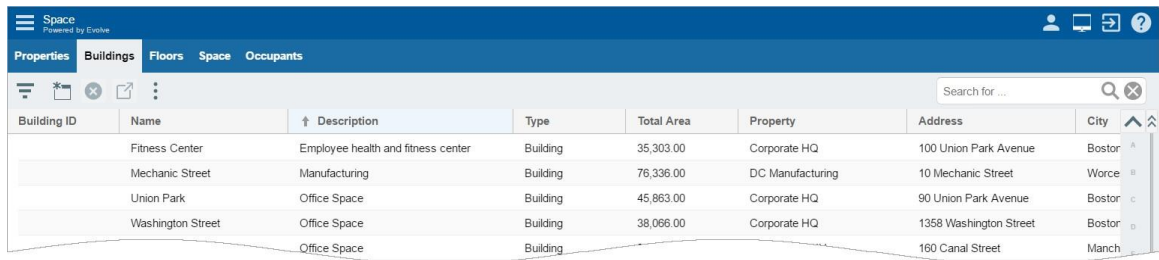
## Buildings Application Grid

The Buildings application grid is designed to manage your Building data records stored in the Evolve FM database.

### ***To Open the Buildings Grid***

1. Click the [Applications menu](#), and then click Space.
2. On the grid page bar, click Buildings.
3. Use the Application Grid tools to Add, Open, and Remove Building data records.

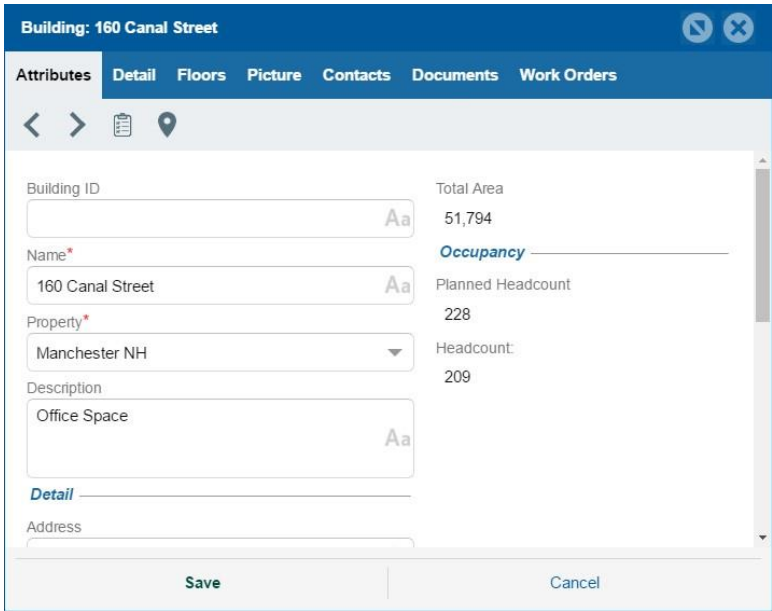
BUILDINGS APPLICATION GRID



Building ID	Name	Description	Type	Total Area	Property	Address	City
	Fitness Center	Employee health and fitness center	Building	35,303.00	Corporate HQ	100 Union Park Avenue	Boston
	Mechanic Street	Manufacturing	Building	76,336.00	DC Manufacturing	10 Mechanic Street	Worcester
	Union Park	Office Space	Building	45,863.00	Corporate HQ	90 Union Park Avenue	Boston
	Washington Street	Office Space	Building	38,066.00	Corporate HQ	1358 Washington Street	Boston
		Office Space	Building			160 Canal Street	Manchester

Building Dialog

The Building dialog is used to manage individual Building data records in the Evolve FM database.



Building: 160 Canal Street

Attributes | Detail | Floors | Picture | Contacts | Documents | Work Orders

Building ID: [Text Field] Total Area: 51,794

Name\*: 160 Canal Street Occupancy: [Text Field]


Property\*: Manchester NH Planned Headcount: 228

Description: Office Space Headcount: 209

Detail

Address: [Text Field]

Save Cancel

ATTRIBUTES	DESCRIPTION
	Opens Google Maps to the location defined in the Address-Country dialog fields.
Building ID	Optional field to capture data.
Name	<b>REQUIRED.</b> The name of the building. This name should be unique for each building within the property.
Property	<b>REQUIRED.</b> The property to which the building is assigned.
Description	Optional field to capture data.
Address	Optional field to capture data.
City	Optional field to capture data.
State	Optional field to capture data.
Postal Code	Optional field to capture data.
Country	Optional field to capture data.
Phone	Optional field to capture data.
Fax	Optional field to capture data.
Web Address	Optional field to capture data.

Total Area	READ-ONLY. Total area of the building. Calculated using the sum of the Total Area of each floor within the building.
Planned Headcount	READ-ONLY. Total planned headcount within the building. Calculated using the sum of the Planned Headcount on each floor within the building.
Headcount	READ-ONLY. Total headcount within the building. Calculated using the sum of the Headcount on each floor within the building.

DETAILS	DESCRIPTION
Owner	Optional field to capture data. Data is controlled in a <a href="#">Lookup List</a> .
Ownership	Optional field to capture data. Data is controlled in a Lookup List.
Floors Above Ground	Optional field to capture data.
Floors Below Ground	Optional field to capture data.
Condition	Optional field to capture data. Data is controlled in a Lookup List.
Condition Index	Optional field to capture data.
Construction Type	Optional field to capture data. Data is controlled in a Lookup List.
Sprinklers	Optional field to capture data. Data is controlled in a Lookup List.
ADA Compliant	Optional field to capture data.
Landmark	Optional field to capture data.
Construction Date	Optional field to capture data.
Occupancy Date	Optional field to capture data.
Renovation Date	Optional field to capture data.
Original Cost	Optional field to capture data.
Replacement Cost	Optional field to capture data.
Last Renovation Cost	Optional field to capture data.
Longitude	Optional field to capture data.
Latitude	Optional field to capture data.
Altitude	Optional field to capture data.
FLOORS	DESCRIPTION
Floor List	Use to view floors assigned to the building.
OTHER	DESCRIPTION
<a href="#">Picture Tab</a>	Use to attach pictures to the data record.
<a href="#">Contacts Tab</a>	Use to assign contacts to the data record.
<a href="#">Documents Tab</a>	Use to attach documents to the data record.
Work Orders Tab	The Operations & Maintenance Module is required for Work Orders.

## Floors

The Floor level in the Evolve FM space structure is typically a level of a Building.

All floors created in Evolve FM must be assigned to a building.

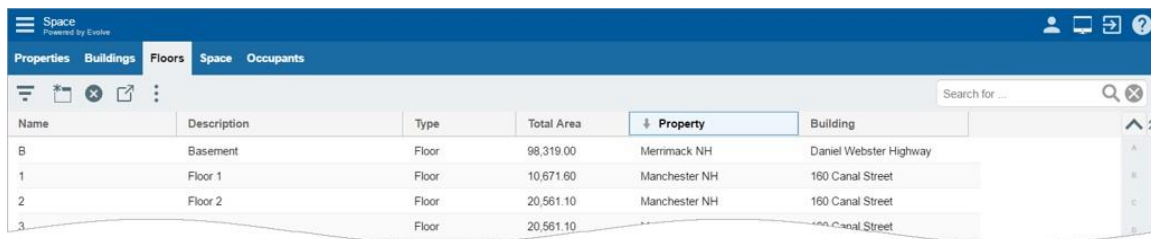
## Floors Application Grid

The Floors application grid is designed to manage your Floor data records stored in the Evolve FM database.

### To Open the Floors Grid

1. Click the [Applications menu](#), and then click Space.
2. On the grid page bar, click Floors.
3. Use the Application Grid tools to Add, Open, and Remove Floor data records.

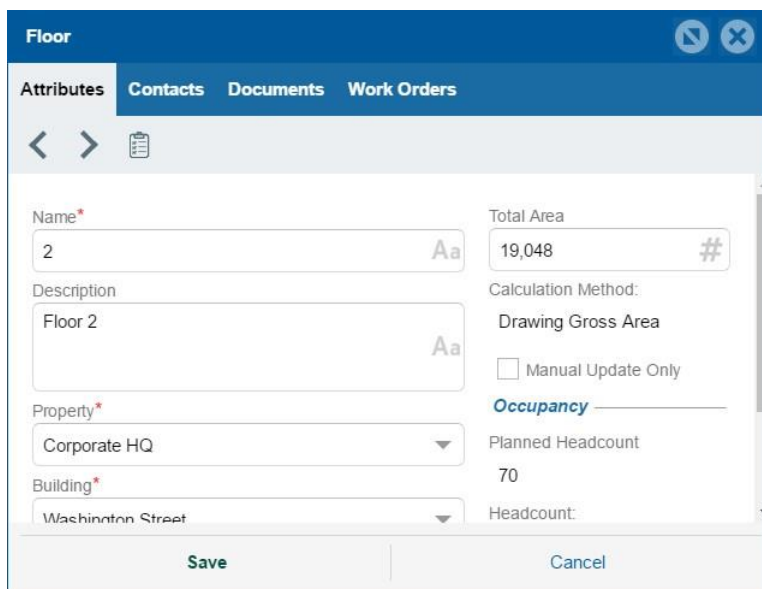
### FLOORS APPLICATION GRID



Name	Description	Type	Total Area	Property	Building
B	Basement	Floor	98,319.00	Merrimack NH	Daniel Webster Highway
1	Floor 1	Floor	10,671.60	Manchester NH	160 Canal Street
2	Floor 2	Floor	20,561.10	Manchester NH	160 Canal Street
3	Floor 3	Floor	20,561.10	Manchester NH	160 Canal Street

## Floor Dialog

The Floor [dialog](#) is used to manage individual Floor data records in the Evolve FM database.



Name\*
2
Aa

Description
Floor 2
Aa

Property\*
Corporate HQ

Building\*
Washington Street

Total Area
19,048
#

Calculation Method:
Drawing Gross Area
☐ Manual Update Only

Occupancy
Planned Headcount
70

Headcount:

Save
Cancel

ATTRIBUTES	DESCRIPTION
Name	<b>REQUIRED.</b> The name of the floor (this is used in the Drawing Navigator Tree). The name should be unique for each floor within the building.
Description	Optional field to capture data.
Property	<b>REQUIRED.</b> The property to which the floor is assigned.
Building	<b>REQUIRED.</b> The building to which the floor is assigned.
Sort Order	The order in which the floors will be organized in the Drawing Navigator tree list. EX: 1 = 1 <sup>st</sup> drawing in tree list, 2 = 2 <sup>nd</sup> drawing in tree list, etc.
Total Area	Total floor area.
Calculation Method	READ-ONLY. Displays the data entry method used to calculate the Total Area. Methods include the following: <ul style="list-style-type: none"> <li>- Space Total (default). The area sum of all spaces assigned to the floor.</li> <li>- Drawing Gross Area. The area imported from the CAD Gross Area polyline.</li> <li>- Manually Entered. A value entered by a user.</li> </ul>
Manual Update Only	Sets the Calculation Method to ignore Space Total and Drawing Gross Area calculation methods during drawing import.
Planned Headcount	READ-ONLY. Total planned headcount on the floor. Calculated using the sum of the Planned Headcount of each space assigned to the floor.
Headcount	READ-ONLY. Total headcount on the floor. Calculated using the sum of the Headcount on each space assigned to the floor.
OTHER	DESCRIPTION
<a href="#">Contacts Tab</a>	Use to assign contacts to the data record.
<a href="#">Documents Tab</a>	Use to attach documents to the data record.
Work Orders Tab	The Operations & Maintenance Module is required for Work Orders.

# Space

The Space level in the Evolve FM space structure is typically a room or other designated area located on a floor within a building, however in an atypical use of the space structure, spaces may be assigned to Properties and Buildings.

## Linked vs. Unlinked


### Linked

Importing a DWF file into Evolve FM is the most common method of creating linked space records in Evolve FM. During the DWF import process, the space records are linked to a Drawing record. That link is what allows you to click spaces on a drawing in the Drawing Viewer.

### Unlinked

Using the Add control, located on the Space application grid, creates unlinked space records. Unlinked space records are not linked to a Drawing record.

IMPORTANT!

 Unlinked space records can be associated with a Property, Building, and Floor using the location selection lists on the Space Dialog, however that assignment does not link them to a Drawing record, even if one may exist for that location.

Unlinked space records are referred to as Orphan records, meaning they live in the Evolve FM database within the Space application grid, but do not have a parent DWF file.

## Space Application Grid

The Space application grid is designed to manage your Space data records stored in the Evolve FM database.

### To Open the Space Grid

1. Click the [Applications menu](#), and then click Space.
2. On the grid page bar, click Space.
3. Use the Application Grid tools to Add, Open, and Remove Space data records.

### SPACE APPLICATION GRID

## Space Dialog

The Space [dialog](#) is used to manage individual Space data records in the Evolve FM database.

ATTRIBUTES	DESCRIPTION
Open Drawing	Click to open the Space Location Viewer and see the space highlighted on the drawing. Use the zoom controls to pan & zoom the drawing.
Space ID	<b>REQUIRED.</b> The unique ID assigned to the space. This value is typically imported on a DWF file, and is one way to link Evolve FM to the DWF.
Space Name	Optional field to capture data.
Description	Optional field to capture data.
Property	<b>REQUIRED.</b> The property to which the space is assigned.
Building	<b>REQUIRED.</b> The building to which the space is assigned.
Floor	<b>REQUIRED.</b> The floor to which the space is assigned.
Space Category	Optional field to capture data. Level 1 of the <a href="#">Space Classification hierarchy</a> .
Space Class	Optional field to capture data. Level 2 of the Space Classification hierarchy.
Space Sub Class	Optional field to capture data. Level 3 of the Space Classification hierarchy.
Tag	Click the Scan Code icon to activate your device camera to scan a QR Code and add its value to the Tag textbox. This function is only available with the Evolve FM Scan Code Professional Tool add-on.
Schedulable	Optional field to capture data.
Allocate Manually	When selected, business units are manually assigned to the Allocation tab by a user.
Area	The area of the space. The value is typically imported on a DWF file, but it may be entered by a user.
Area 2	An optional field to capture a secondary area of the space. The value can be imported on a DWF file, or entered by a user.
Planned Headcount	The number of people that can occupy the space at the same time. Affects occupancy.
Headcount	READ-ONLY. The count of occupants assigned to the space. Affects occupancy.
DETAIL	DESCRIPTION

Condition	Optional field to capture data.
Condition Index	Optional field to capture data.
Architectural Features	Optional field to capture data.
ADA Compliant	Optional field to capture data.
Wet Lab	Optional field to capture data.
Communication	Optional field to capture data.
Electrical	Optional field to capture data.
Gas	Optional field to capture data.
Special Plumbing	Optional field to capture data.
Temperature Control	Optional field to capture data.
Ventilation	Optional field to capture data.
Water	Optional field to capture data.
<b>FICM</b>	<b>DESCRIPTION</b>
Primary Use	Optional field to capture data.
Alternate Use	Optional field to capture data.
Function Category	Optional field to capture data.
Function	Optional field to capture data.
Discipline	Optional field to capture data.
Suitability	Optional field to capture data.
<b>OTHER</b>	<b>DESCRIPTION</b>
<a href="#">Picture Tab</a>	Use to attach pictures to the data record.
<a href="#">Contacts Tab</a>	Use to assign contacts to the data record.
<a href="#">Occupants Tab</a>	A list of all occupants in the space. Use to move occupants in/out of the space, and to see space occupancy history.
<a href="#">Assets Tab</a>	A list of all assets in the space. Use to move assets in/out of the space.
<a href="#">Allocation Tab</a>	The business unit(s) assigned to the space.
<a href="#">Documents Tab</a>	Use to attach documents to the data record.
Work Orders Tab	The Operations & Maintenance Module is required for Work Orders.



## Chapter 1.8:

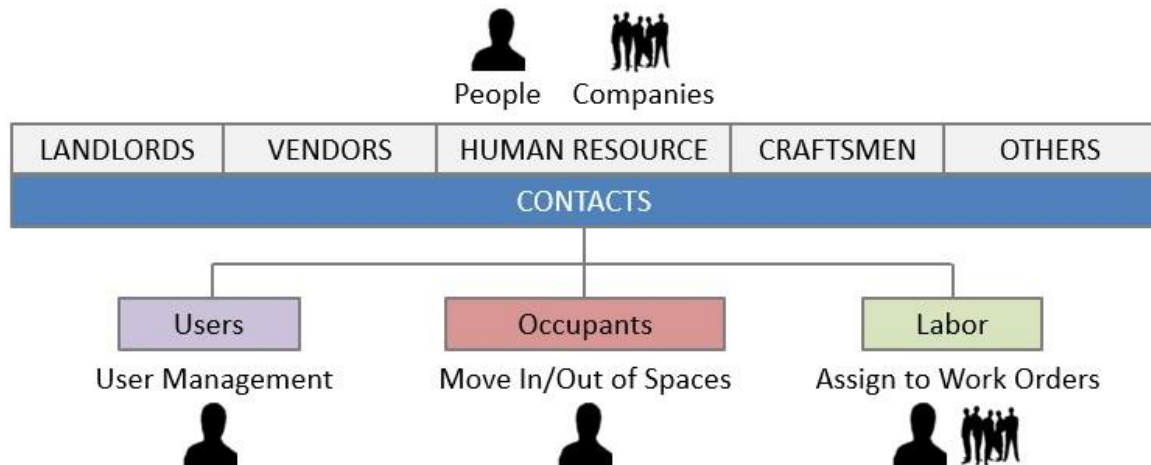
### Contacts

## About Contacts

The Evolve FM Contacts module is designed to manage all of the people, and company, data records associated with your organization.

### People Hierarchy

The Contacts module is the core collection of people records in Evolve FM. User, Occupant, and Labor records are all subset records of the Contacts list. Each User, Occupant, and Labor record is linked to its root Contact record.



### Contacts Application Grid

The Contacts application grid is designed to manage your Contact data records stored in the Evolve FM database.

#### To Open the Contacts Grid

1. Click the [Applications menu](#), and then click Contacts.
2. Use the Application Grid tools to Add, Open, and Remove Contact data records.

#### CONTACTS APPLICATION GRID

Pict...	Name	Last Name	First Name	Company Name	Title	Email	Work Order
	Bruce E Amidon	Amidon	Bruce E		Accounting Super...	AmidonBE@ssfm.com	
	Anilkumar R Amin	Amin	Anilkumar R		Business Specialist	AminAR@ssfm.com	978-
	Sarah H Anderson	Anderson	Sarah H		Accounting Super...	AndersonSH@ssfm.com	

## Contact Dialog

The Contact dialog is used to manage individual Contact data records in the Evolve FM database.

**IMPORTANT!** The data entered on Contact dialog directly affects linked User, Occupant, and Labor records, if they exist in Evolve FM.



CONTROL	DESCRIPTION
Change Picture 	Use to add a User Image to the Contact dialog. Default Person Picture (60x80 pixels) Default Company Picture (70x72 pixels) TIP: Format your User Images to about 70x70 – 80x80 pixels for best results.
Person	Identifies the contact record as a Person. People can be in the Occupant, User, & Labor lists.
Company	Identifies the contact record as a Company. Companies can be in the Labor list.
First Name	<b>REQUIRED</b> if the contact type is Person. Enter the person’s first name, and middle initial/name if needed. The combination of First Name and Last Name should be unique within your contact list. EX: John M Smith, John P Smith, John L Smith, etc.
Last Name	<b>REQUIRED</b> if the contact type is Person. Enter the person’s last name, and applicable suffix if needed.
Company Name	<b>REQUIRED</b> if the contact type is Company.
Title	Optional field to capture data.
Employee ID	Optional field to capture data. This field is typically used as the unique ID for people data records.
Work Phone	Optional field to capture data.

Mobile Phone	Optional field to capture data.
Home Phone	Optional field to capture data.
Address	Optional field to capture data.

IMPORTANT!



City	Optional field to capture data.
State	Optional field to capture data.
Postal Code	Optional field to capture data.
Email	Optional field to capture data.

## Add, Edit, Remove a Contact

### Add a New Contact

The initial bulk import of Contact records is typically performed by your Evolve FM administrator. The steps below outline the procedure to add individual Contact records to Evolve FM.

1. On the Contacts application grid, click Add.
2. On the Contact dialog select Person, or Company and do one of the following:
  - Person: Enter First Name, Last name and any other data fields as needed.
  - Company: Enter Company Name, and any other data fields as needed.

### Edit a Contact

1. On the Contacts application grid, select the contact to be edited, and then click Open.
2. Edit the data fields as needed, and click Save.

Changes made to a Contact record, affect its linked User, Occupant, and Labor records.

### Remove a Contact

1. On the Contacts application grid, select the contact to be removed.
2. Click Remove.

IMPORTANT!



When a Contact record is removed, the linked Occupant and Labor records are also removed from Evolve FM. A linked Occupant will be moved out of any space they may occupy, and the occupancy will be added to the space history. Removing a Contact record does not remove its linked User record; Users must be removed from within Platform Administration.

# Add Contacts to a Data Record

Evolve FM Contact records can be assigned to Evolve FM data records, to identify the person/company to be contacted in relationship to the data record.

## Contact Examples

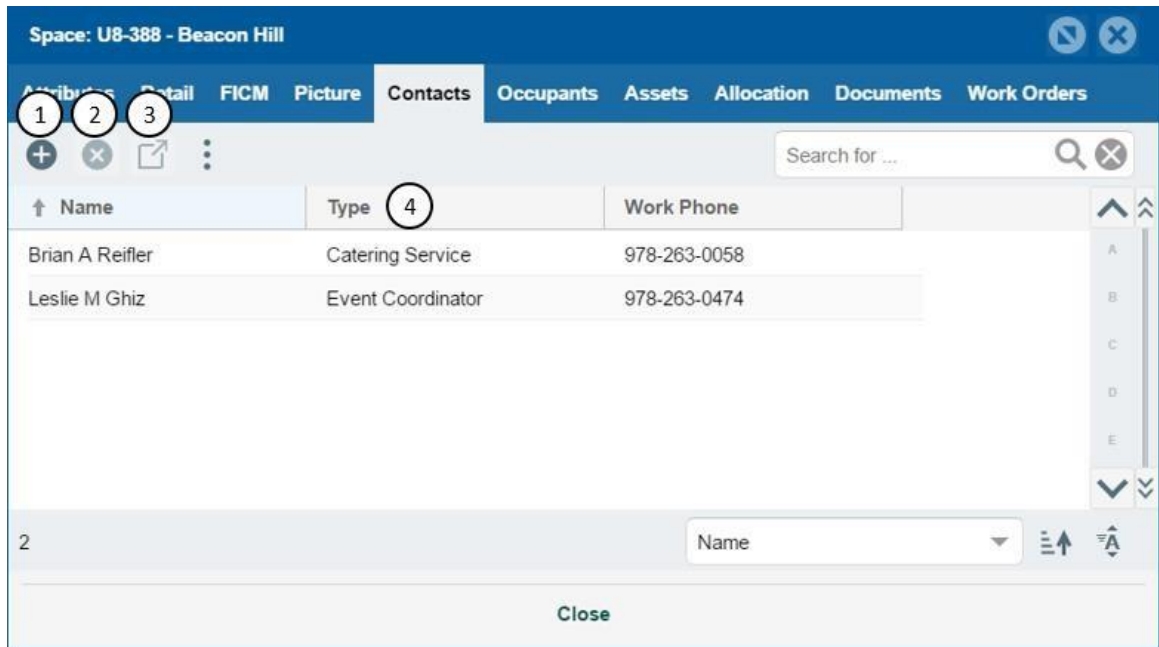
- A landlord, as a contact on a building record.
- A catering service, as a contact on a conference room space record.
- An HVAC supplier, as a contact on an asset equipment record.

## The Contacts Tab

The Contacts tab, is common to the Evolve FM data record dialog, and is used to assign Evolve FM Contact records to the data record. The Contacts tab, located on the Space dialog is illustrated below.

Use the Add, Remove, and Open, controls to manage contact records assigned to the dialog.

CONTACTS TAB, SPACE DIALOG



ITEM	CONTROL	DESCRIPTION
1	Add	Opens the Select Contact dialog. Use the dialog to a select a contact record(s) and add them to the data record.

2	Remove	Removes the selected contact record from the data record.
3	Open	Opens the Record Contact dialog, for the contact selected on the tab.
4	Contact Type	The type of contact, as it relates to this data record.

## The Record Contact Dialog

The Record Contact dialog, displays when the Open control is used to open a Contact record assigned to the Contacts tab of a dialog form.

The screenshot shows the 'Record Contact' dialog box. At the top, there's a header bar with the title 'Record Contact' and standard window controls. Below the header, on the left, is a silhouette icon representing a person. To the right of the icon, the contact's name 'Brian A Reifler' is displayed, followed by his email 'ReiflerBA@ssfm.com' and phone number '978-263-0058'. Below this information, there's a 'Type' dropdown menu currently set to 'Catering Service'. Underneath the dropdown is a section titled 'Phone' in blue. It contains two input fields: 'Work Phone' with the value '978-263-0058' and a phone icon, and 'Mobile Phone' which is currently empty. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

This dialog contains the contact's Phone and Address information, and the Type list, which can be used to define the relationship between the contact and the data record to which they have been assigned. Edits made to the Phone and Address data on this dialog affect the Contact record in Evolve FM.

### About the Contact Type

The Type list located on the Record Contact dialog, shown in the image above, and on the Select Contact dialog shown in the image below, is used to describe the association between the Contact, and in what manner they are related to the object they've been assigned.

#### SELECT CONTACT DIALOG, TYPE LIST

The screenshot shows the 'Select Contact' dialog box. At the top, there's a header bar with the title 'Select Contact' and standard window controls. Below the header, on the left, is a silhouette icon representing a person. To the right of the icon, the contact's name 'Cynthia A Barry' is displayed, followed by her last name 'Barry'. Below this information, there's a 'Type' dropdown menu currently set to 'Landlord'. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

For example, when a Contact record is added to the Contacts tab on the Building dialog, a Contact Type assignment of "Landlord" would describe the Contact as the landlord of that building.

***Contact Type Examples***

- Landlord
- Catering Service
- Supplier
- Primary Investigator

## Chapter 1.9: Occupants



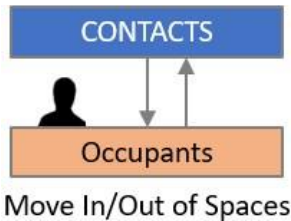
## About Occupants

Occupants are defined as the people who will be able to occupy a space in Evolve FM.

**IMPORTANT!**  
is 

Evolve FM Occupants are a subset of your Evolve FM Contact records, meaning each Occupant record is linked to its associated Contact record.

When adding Occupants to Evolve FM, you can select people from your Contact list and add them to your Occupant list, or you can create new Occupant records, which will automatically create new linked Contact records, and will add those new records to the Contacts grid.



**IMPORTANT!**  


For every Occupant record in Evolve FM, there is a linked Contact record.

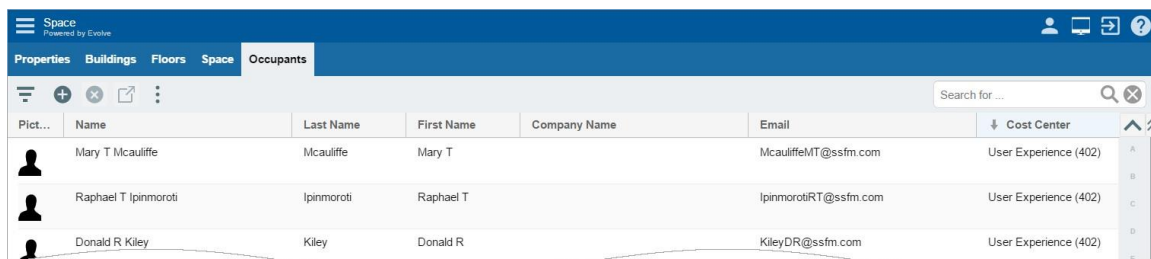
## Occupants Application Grid




The Occupants application grid is located in the Space module, and is designed to manage your Occupant data records stored in the Evolve FM database.

### To Open the Occupants Grid

1. Click the [Applications menu](#), and then click Space.
2. On the grid page bar, click Occupants.
3. Use the Application Grid tools to Add, Open, and Remove Occupant data records.

### OCCUPANTS APPLICATION GRID



Pict...	Name	Last Name	First Name	Company Name	Email	Cost Center
	Mary T McAuliffe	McAuliffe	Mary T		McauliffeMT@ssfm.com	User Experience (402)
	Raphael T Ipinmoroti	Ipinmoroti	Raphael T		IpinmorotiRT@ssfm.com	User Experience (402)
	Donald R Kiley	Kiley	Donald R		KileyDR@ssfm.com	User Experience (402)


## Occupant Dialog

The Occupant dialog is used to manage individual Occupant data records in the Evolve FM database.

Occupant: Alfred N Acevedo - Sales Manager

Attributes Contact Information Spaces Assets

< > 📍




Alfred N Acevedo  
Sales Manager  
AcevedoAN@ssfm.com  
5432

Category  
Full Time

Employee ID  
11020786

Save Cancel

ATTRIBUTES	DESCRIPTION
 Open Drawing	Click to open the Occupant Location Viewer and see the occupant's space highlighted on a drawing. If an occupant resides in 2 or more spaces, use the viewer's location list to select, and view, another space. Use the zoom controls to pan & zoom the drawing.
Category	Use this field to categorize your occupants. For example, Full Time, Part Time, Contractor, etc.
Employee ID	The Human Resource Employee ID number assigned to the occupant. This field is typically used as the unique identifier in the Contacts grid, and in the Occupants grid.
Tier 1	The Tier 1 business unit assigned to the occupant.
Start Time	The time the occupant begins their work day.
End Time	The time the occupant ends their work day.
CONTACT INFORMATION	<b>IMPORTANT:</b> Contact information is linked to the Occupant's root Contact record.
Company Name	Optional field to capture data.
Title	Optional field to capture data.
First Name	<b>REQUIRED.</b> Enter the person's first name and middle initial/name if needed. The combination of First Name and Last Name should be unique within your occupant list. EX: John M Smith, John P Smith, John L Smith, etc.
Last Name	<b>REQUIRED.</b> Enter the person's last name and applicable suffix if needed. The combination of First Name and Last Name should be unique within your occupant list. EX: John Smith Jr, John Smith Sr
Work Phone	Optional field to capture data.
Mobile Phone	Optional field to capture data.
Home Phone	Optional field to capture data.
Address	Optional field to capture data.
City	Optional field to capture data.

State	Optional field to capture data.
Postal Code	Optional field to capture data.
Email	Optional field to capture data.
OTHER	DESCRIPTION
<a href="#">Spaces Tab</a>	A list of spaces that the occupant occupies. Use to move the occupant in/out of a space and to view the occupant's past/present/future space occupancies.
<a href="#">Assets Tab</a>	A list of all assets assigned to the occupant. Use to add/remove the occupant's assets.

## Add, Edit, Remove an Occupant

Occupant records are typically bulk imported into Evolve FM using a data import file from Human Resources. After the initial import, there may be a periodic import from HR, or you may manage occupants using the Occupants applications grid.

### Add a New Occupant

1. On the Occupants application grid, click Add.
2. On the Select Occupant dialog do one of the following:
  - Use the grid search features to find, and select, the Contact record(s) that you are adding to Occupants. This method will link the existing Contact record(s) to the new Occupant record(s).
  - Click NEW to create a new Occupant record. This method will automatically create a new Contact record too, and add it to the Contacts grid. The new Occupant record is automatically linked to the new Contact record.

**IMPORTANT!** For every Occupant record, there is an associated root Contact record.



### Edit an Occupant

1. On the Occupants application grid, select the occupant to be edited, and then click Open.
2. Edit the data fields as needed, and click Save.

**IMPORTANT!** Changes made to an Occupant's Contact information, affect the Occupant's root Contact record.



### Remove an Occupant

1. On the Occupants application grid, select the occupant to be removed.
2. Click Remove.

**IMPORTANT!** If the occupant is assigned to a space, they will be moved out of the space, and the occupancy will be added to the space history. The Occupant's linked Contact record is not removed. To remove their Contact record, remove the person from the Contacts application grid.



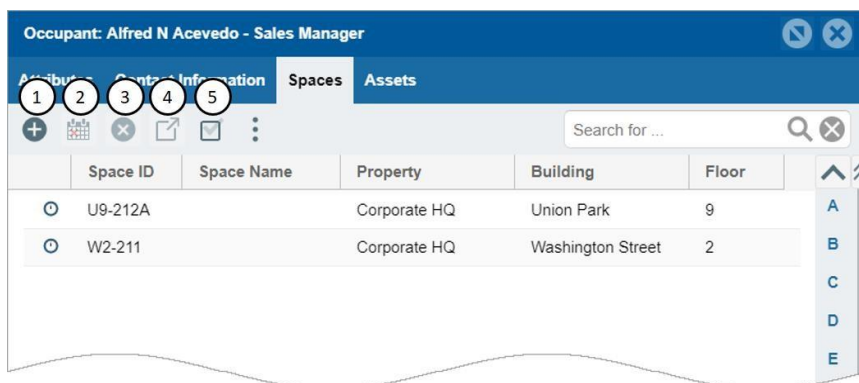
## Move an Occupant In or Out of a Space

There are two Evolve FM dialogs that are used to manage people in spaces, the Occupant dialog, and the Space dialog. Either can be used to move an occupant in to, or out of, of a space in Evolve FM.

### Occupant Dialog Move

The Occupant dialog can be used to manage an occupant's space assignments. The Spaces tab located on the dialog, shows all spaces where the occupant is currently assigned, and can be used to move an occupant in to, or out of, spaces in Evolve FM. The dialog move controls 1-5 are outlined on the next page.

#### SPACES TAB, OCCUPANT DIALOG, MOVE IN/OUT CONTROLS



#### NOTE!

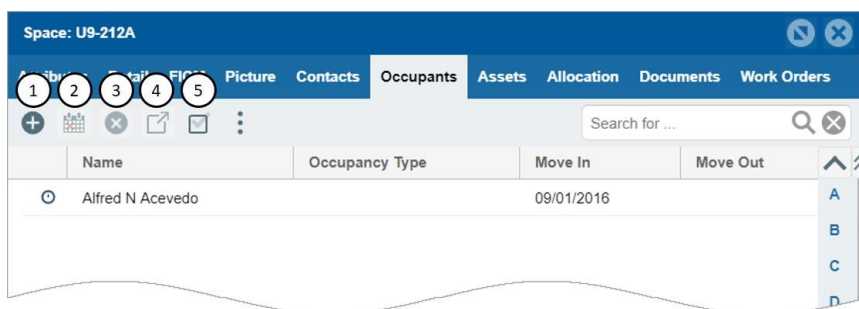


The Occupant dialog may display options 1-5 on the More Actions flyout menu. Stretching the dialog to expand its width will display the icons shown in the above image.

### Space Dialog Move

The Space dialog can be used to manage the occupants who are assigned to a space. The Occupants tab on the dialog, shows all occupants assigned to the space, and can be used to move occupants in to, or out of, a space in Evolve FM. The dialog move controls 1-5 are outlined on the next page.

#### OCCUPANTS TAB, SPACE DIALOG, MOVE IN/OUT CONTROLS



### Dialog Move Controls

ITEM	CONTROL	DESCRIPTION
1	Add	Opens the Select dialog, which is used to move an occupant into the space. The current date is used as the Move In date.
2	Move Out	Opens the Occupant Move Out dialog, which is used to move an occupant out of a space. Move out options include: - Use the current date as the Move Out date. The occupant will be moved out of the space when Save is clicked. - Change the Move Out date to schedule the move for another date. The occupant will remain in the space until the scheduled move out date. The move out will happen automatically on the scheduled date. Note: Move Out will add the move to the space occupancy history.
3	Remove	Removes a selected occupant from the space. Note: Remove will not add the move to the space occupancy history.
4	Open	Opens the Space Occupant dialog for a selected occupant.
5	History	Shows the history of past, present, and future occupancies.

## The Space Occupant Dialog

The Space Occupant dialog, is used to manage the space occupancy of an occupant in a space

### To Open the Space Occupant Dialog

- Do one of the following:
  - On the Spaces tab of the Occupant dialog, select an occupant and click Open.
  - On the Occupants tab of the Space dialog, select an occupant and click Open.

**Space Occupant**

Alfred N Acevedo  
Sales Manager  
AcevedoAN@ssfm.com  
5432

Tier 1  
Sales (304)

**Occupancy**

Occupancy Type

Move In\*  
09/01/2016

Move Out

Save Cancel

CONTROL	DESCRIPTION
Tier 1	The business unit assigned to the occupant. Changes made to the assignment will update the Occupant record.
Occupancy Type	Use to define the association between the occupant and the space.
Move In	The date the occupant was moved into the space. - The current date is the default move in date. - Use the Move In date to schedule the move for another date. The occupant will not show in the space until the date entered here, and then the move in will happen automatically on the scheduled date.
Move Out	The date the occupant will be moved out of the space. - Use the Move Out date to schedule the move. If the Move Out date is the current date, the occupant will be moved when Save is used. If the Move Out date is a future date, the occupant will remain in the space until the date entered here, and then the move out will happen automatically on the scheduled date.
Start Time	The time the occupant will begin to use this space each day.
End Time	The time the occupant will stop using this space each day.
All Day	Click to set Start time to 12:00AM and the End to 11:59PM.

## About the Occupancy Type

Occupancy Type is used to describe the association between the occupant and in what manner they are occupying the space.

### Occupancy Type Examples

- Floor Warden
- Primary Investigator
- Desk by Window

The Occupant Type assignment can be made using the Occupancy Type list, located on the Space Occupant dialog, or on the Select dialog at the time an occupant is added to a space record, as shown in the image below.

### SELECT DIALOG, TYPE SELECTION LIST

# Chapter 1.11:

## Pick & Click Occupant and Asset Moves

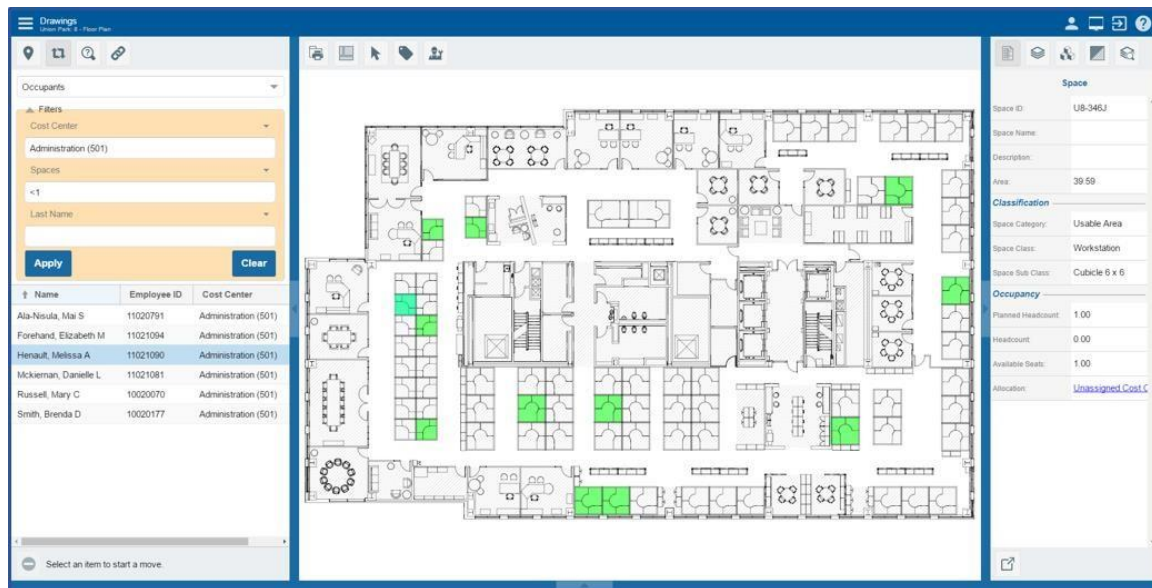
## Pick & Click Moves

Pick & Click moves are made from the Moves pane located in the Drawing Viewer.


### Preparing for Pick & Click Moves

- To view vacant seats, you can apply the Available Seats theme to the drawing in the Viewer.
- If needed, the Moves pane can be stretched to show more columns in the Moves grid.
- If needed, the Move grid column headers can be rearranged, sorted, and turned on/off using the column header controls.
- If needed, use the Filter controls to filter the Move grid records.

#### PICK & CLICK MOVES



### To Move Occupants into Spaces

1. On the Drawing Navigator panel, click  Moves to display the Moves pane.
2. In the Move Scope list, choose Occupants.
3. OPTIONAL: Expand Filters and search for occupants in to the Move grid. The image above illustrates the following filters:
  - a. Cost Center = Administration
  - b. Spaces <1



Results: Show occupants assigned to the Administration cost center, and not assigned to a space.

## 1.11 Pick & Click Moves

4. In the Move grid, pick the Occupant to be moved.
5. Click a space on the drawing to seat the occupant.
6. On the [Space Occupant dialog](#), use the current date as the Move In date, or enter a future date to schedule the move.


### NOTE!



When scheduling the move for a future date, the person will not appear in the space until the Move In date is reached. When the Move In date is reached, the person will automatically move into the space.

7. Optional:
  - a. Assign an [Occupancy Type](#).
  - b. Enter the occupant's Start Time/End Time.
8. Select a Move In option:
  - a. Move into this space (the person will also remain in any other space that they occupy).
  - b. Move into this space and out of all others (the person will occupy only this space).


## To Move Assets into Spaces

1. On the Drawing Navigator panel, click  Moves to display the Moves pane.
2. In the Move Scope list, choose Assets.
3. OPTIONAL: Expand Filters and search for assets in the Move grid.
4. In the Move grid, pick the Asset to be moved.
5. Click a space on the drawing to put the asset.
6. On the Asset Move dialog, click Move into this space.

## Pick & Click Between Drawings

The Pick & Click function activates when you pick an occupant or asset in the Moves list, and will remain active until you click to select a space on a drawing, or until you click Cancel Move. This allows you to use the Drawing Navigator to move between drawings while still active in the Move.

1. On the Drawing Navigator panel, click  Moves to display the Moves pane.
2. In the Move Scope list, choose Occupants or Assets.

3. In the Move grid, pick the Occupant/Asset to be moved.
4. On the Drawing Navigator panel, click  Drawing Navigator, and then select a drawing from the tree list.
5. Click a space on that drawing to place the Occupant/Asset.

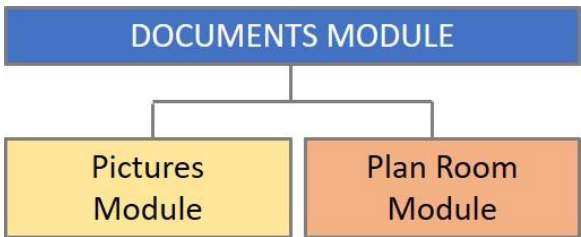
## Chapter 1.12: Documents

# About Documents

All document and image files uploaded to Evolve FM (excluding User images), are stored in the Documents module of Evolve FM. These documents and image files can be selected from the Documents module, and assigned to a data record using the [Documents tab](#) located on the record's dialog form.

## Document Hierarchy

The Documents module is the core collection of all documents and pictures in Evolve FM. Picture records and Plan Room records are subset records of the Documents module. Each Picture and Plan Room record is linked to its root Document record.



## Documents Application Grid

The Documents application grid is designed to manage Document records stored in the Evolve FM database.

### To Open the Documents Grid

- 1. Click the [Applications menu](#), and then click Documents.
- 2. Use the Application Grid tools to Add, Remove, Open, and Download Document records.

DOCUMENTS APPLICATION GRID

Documents Powered by Evolve						
Search for ...						
Name	Description	Category	Uploaded By	Uploaded	File Name	
AT Operation-Maint Manual	AT Operation and Maintenance Manual	HVAC	Evolve Administrator	4/20/2013	new-71-AT CoolingTower Operati...	A
AT Replacement Parts	Cooling Tower Replacement Part List	HVAC	Evolve Administrator	4/20/2013	new-71-AT Replacement Parts.pdf	B
ATC-E	Evaporative Condenser	HVAC	Evolve Administrator	4/19/2013	new-71-atc-e.jpg	C
ATC-E Replacement Parts	ATC-E Replacement Part List	HVAC	Evolve Administrator	4/20/2013	new-71-ATC-E replacement parts...	D
ATC-E Seasonal Shutdown	ATC-E Seasonal Shutdown Instructions	HVAC	Evolve Administrator	4/20/2013	new-71-ATC-E Seasonal Shutdo...	E
	ATC-E Seasonal Startup Instructions				new-71-ATC-E Seasonal Startup...	

## Document Dialog

The Document dialog is used to manage individual Document records in the Evolve FM database.

Document

<

>

↓

↑

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Detail

Name\*

AT Operation-Maint Manual

Aa

Description

AT Operation and Maintenance Manual

Aa

Category

HVAC

+

File

Save

Cancel

CONTROL	DESCRIPTION
Name	<b>REQUIRED.</b> The name of the document. The name should be unique for each document record.
Description	Optional field to capture data.
Category	Use this list to categorize your documents.
File Information	READ-ONLY. The document file name assigned by Evolve FM. READ-ONLY. The date the document file was uploaded to Evolve FM. READ-ONLY. The name of the user who uploaded the document file.
<div>Download</div>	Use to download the document file. Creates a .zip download package containing the document.
<div>Upload</div>	Use to upload a document to Evolve FM.
<div>Preview</div>	Displays a preview of the document file. Your device must have the native document application to preview the document (ex. Adobe Reader, EXCEL, etc.).

# Working with Documents


## Upload or Download Documents

### Upload a New Document

1. On the Documents application grid, click New.
2. On the Document dialog, enter the name of your document.
3. Enter a Description of the document (optional).
4. Assign a Category.
5. Click Upload, and navigate to, and select, the document file to be uploaded, and then click Save.
6. Click Save.

### Download a Document(s)

Documents in the application grid can be downloaded using the Download control located on the grid menu.

1. Select one or more documents on the Documents application grid.
2. Click  Download.

Creates a .zip download package containing the selected document(s).

## Edit or Remove Documents

### Edit a Document Record

1. Select a Document record in the Documents application grid, and then click Open.
2. Edit the data in the form as needed and/or upload another document file to replace the existing file.
3. Click Save.

Changes made to a Document record, affect its linked Picture, and/or Plan Room records.

### Remove a Document Record(s)

1. In the Documents application grid, select one or more document records.
2. Click Remove.

#### IMPORTANT!



If the Document record is an image file (.jpg, .gif, etc.) its linked Picture record is also removed from

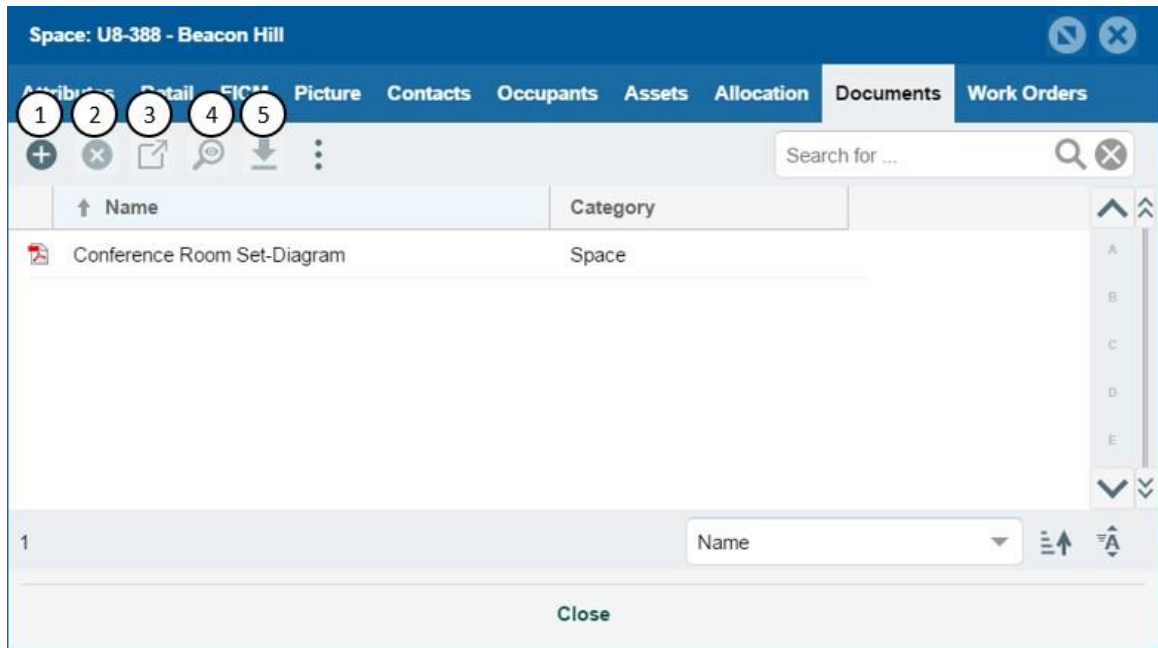
Evolve FM. If the Document record is a Plan Room document, the document must be removed from the Plan Room module first, and then removed from the Documents module.

# Attach a Document to a Data Record

## The Documents Tab

The Documents tab is common to the Evolve FM data record dialog, and is used to attach Evolve FM Document records to the data record. The Documents tab, located on the Space dialog is illustrated below.

DOCUMENTS TAB, SPACE DIALOG



ITEM	CONTROL	DESCRIPTION
1	Add	Opens the Select Document dialog. Use the dialog to a select document(s) and add it to the data record.
2	Remove	Removes the selected document(s) from the data record.
3	Open	Opens the Document dialog, for the document selected on the tab.
4	Preview	Opens a preview window for the selected document.
5	Download	Creates a .zip download package containing the selected document(s).

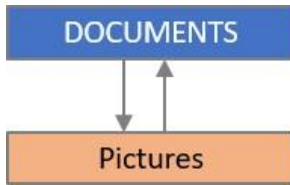
# Chapter 1.13:

## Pictures

### About Pictures

Evolve FM Pictures are a subset of your Evolve FM Document records. All Document records that have been identified as an image file are filtered into the Pictures module. When you add a new picture to Evolve FM from within the Pictures module, the new image file is automatically added to the Documents module as well.

These image files are selected from the Pictures module, and assigned to a data record using the [Picture tab](#) located on the record's dialog form.



**IMPORTANT!** For every Picture record in Evolve FM, there is a linked Document record.



## Pictures Application Grid

The Pictures application grid is designed to manage your Picture records stored in the Evolve FM database.

### To Open the Pictures Grid

1. Click the [Applications menu](#), and then click Pictures.
2. Use the Application Grid tools to Add, Remove, Open, and Download Picture records.

### PICTURES APPLICATION GRID

Picture	Name	Description	Category	Uploaded By	Uploaded	File Name
	Hydrant		Life Safety	Evolve Administrator	4/22/2013	new-71-Hydrant.jpg
	Intensity III		Mobile Phone	Evolve Administrator	4/20/2013	new-71-Intensity III.jpg
	iPhone 5s		Mobile Phone	Evolve Administrator	7/25/2015	new-71-iphone-5s-box-1
	Lenovo PC Config		Computer Network	Evolve Administrator	7/25/2015	new-71-lenovo-thinkcer
	Lexmark_E120	Network Printer	Office Equipment	Evolve Administrator	7/25/2015	new-71-Printer_Lexmar

## Picture Dialog

The Picture dialog is used to manage individual Picture records in the Evolve FM database.



Picture

< > ⬇ ⬆ 🔍

Detail

Name\*

HDTV-SHARP

Aa

Description

Sharp LED Flat-Panel HDTV

Aa




Category

Electronics

+

File

Save Cancel

CONTROL	DESCRIPTION
Name	<b>REQUIRED.</b> The name of the picture. The name should be unique for each picture record.
Description	Optional field to capture data.
Category	Use this field to categorize your pictures.
File Information	READ-ONLY. The picture file name assigned by Evolve FM. READ-ONLY. The date the picture file was uploaded to Evolve FM. READ-ONLY. The name of the user who uploaded the picture file.
 Download	Use to download the picture file. Creates a .zip download package containing the picture.
 Upload	Use to upload a picture to Evolve FM.
 Preview	Displays a preview of the picture file.

# Working with Pictures

## Upload or Download Pictures

### Upload a New Picture

1. On the Pictures application grid, click New.
2. On the Picture dialog, enter the name of your picture.


### 1.13 Pictures

3. Enter a Description of the picture (optional).
4. Assign a Category.
5. Click Upload, and navigate to, and select, the image file to be uploaded, and then click Save.
6. Click Save.

A new Picture record, automatically creates a new linked Document record.

### Download a Picture(s)

Pictures in the application grid can be downloaded using the Download control located on the grid menu.


1. Select one or more pictures on the application grid.
2. Click  Download.

**NOTE!**  Creates a .zip download package containing the selected picture(s).

## Edit or Remove Pictures

### Edit a Picture Record

1. Select a Picture record in the application grid, and then click Open.
2. Edit the data in the form as needed and/or upload another picture file to replace the existing file.
3. Click Save.

**IMPORTANT!**  Changes made to a Picture record, affect the linked Document record.

## Remove a Picture Record(s)

1. In the Pictures application grid, select one or more picture records.
2. Click Remove.

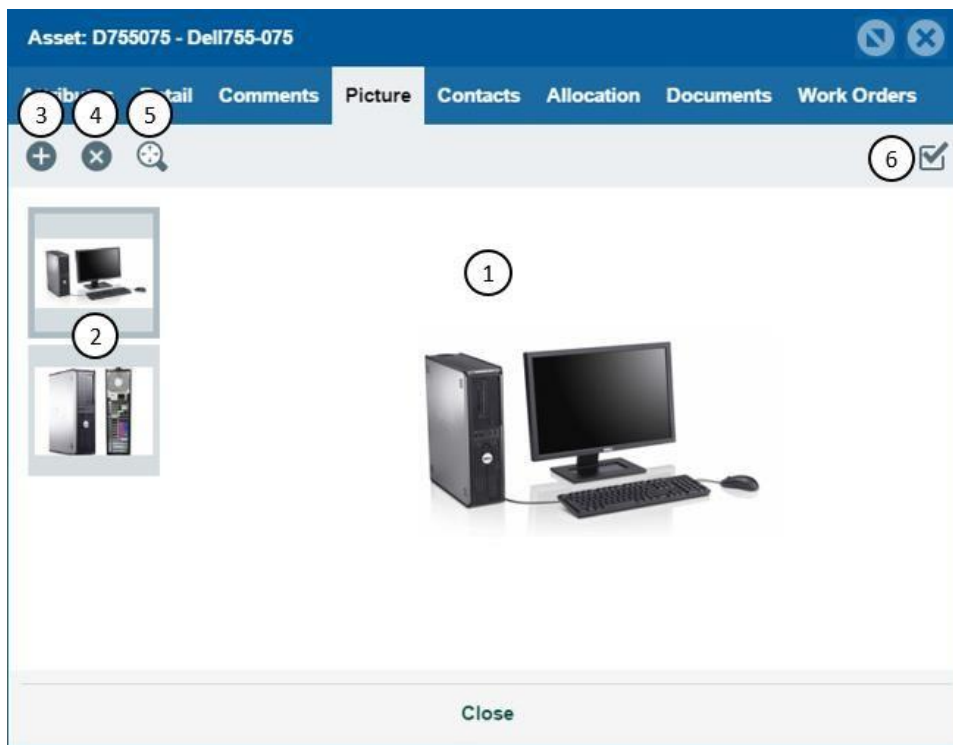
The linked Document record will also be removed.

## Attach a Picture to a Data Record

### The Picture Tab

The Picture tab is common to the Evolve FM data record dialog, and is used to attach Evolve FM Picture records to the data record. The Picture tab, located on the Asset dialog is illustrated below.

PICTURE TAB, ASSET DIALOG



ITEM	CONTROL	DESCRIPTION
1	Active Picture	The active picture display.
2	Picture Bar	Displays all pictures assigned to the data record. Click a picture on the bar to make it the active picture.
3	Add	Opens the Select Picture dialog. Use the dialog to select a picture(s) and add it to the data record.
4	Remove	Removes the active picture from the data record.
5	Zoom	Zooms the active picture in/out.
6	Set Default	Sets the active picture as the default picture to display on the tab.

## Chapter 1.14: Reporting

## About the Reporting Module

The Reporting module is used to manage and run reports in Evolve FM. The Reporting module contains four reporting pages.

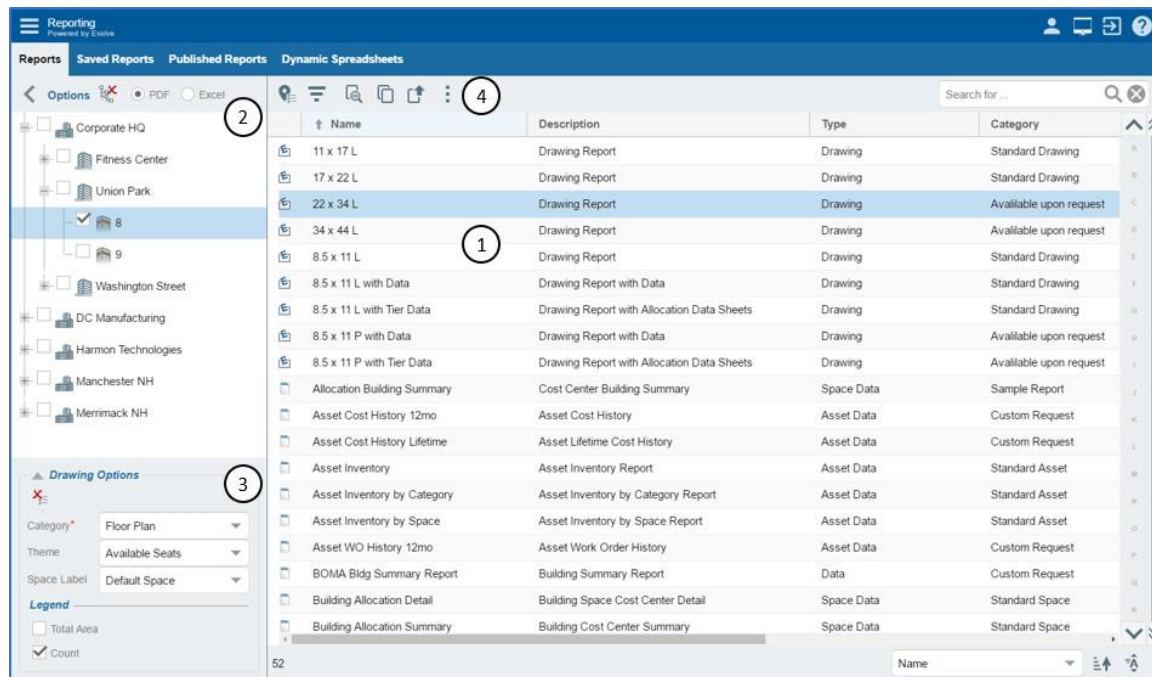
- Reports
- Saved Reports
- Published Reports
- Dynamic Spreadsheets

### To Open the Reporting Module

1. On the [Applications Menu](#), click Reporting.

## The Reporting Interface

The reporting interface provides the controls used for configuration and execution of reports.

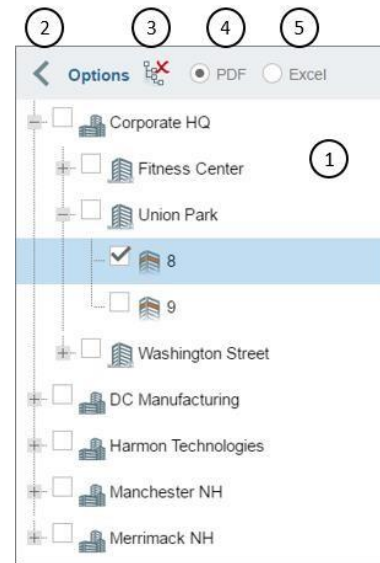


ITEM	CONTROL	DESCRIPTION
1	Report Grid	Report items related to the selected page.
2	Configuration Options	Report output configuration options.
3	Drawing Options	Drawing report output configuration options.
4	Reporting Menu	Reporting tools.

## Configuration Options

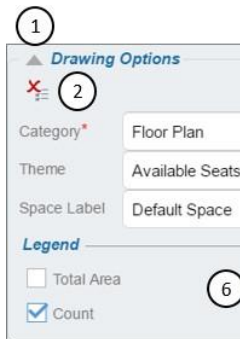
The Configuration Options are used to filter a report's data set based on a Property, Building, or Floor location in Evolve FM. The report output format is also defined here.

ITEM	CONTROL	DESCRIPTION
1	Location Tree	Click a location(s) in the tree to filter the report data set to the location(s) selected.
2	Hide Options	Click to hide the Options panel.
3	Clear All	Click to clear all Location Tree checkboxes.
4	PDF	Produces the report in PDF format.
5	Excel	Produces the report in EXCEL format.



## Drawing Options

Drawing Options are used to configure drawing reports. They are not available when a data report is selected in the report grid.



ITEM	CONTROL	DESCRIPTION
1	Show/Hide	Click to show/hide the Drawing Options.
2	Clear All	Click to clear all drawing options.
3	Category	<b>REQUIRED.</b> Select the drawing category to be used in the report.
4	Theme	Use to apply a theme to the drawing. *
5	Space Label	Use to display a label on the drawing.
6	Legend	Use to add the Total Area, and/or Count to each key item in the drawing legend. *

\*Not available in Dynamic Spreadsheets.

## Reporting Menu



ITEM	CONTROL	DESCRIPTION
1	Configuration Options	Click to show the Configuration Options panel.
2	<a href="#">Filters</a>	Click to show the Filters panel.
3	Preview	Click to generate the report.
4	Save As	Click to save the configuration options set on the Reports page, to the Saved Reports page.
5	Publish	Click to send a copy of the executed report, to the Published Reports page.

6	Display Options	Grid display options menu.
---	-----------------	----------------------------

# Reports

The Reports page of the Reporting module, utilizes SQL Server Report Definition Language (RDL) files to format report data in Evolve FM. The RDL files contain the data retrieval and report layout for a report.

**RDL Files Contain:**

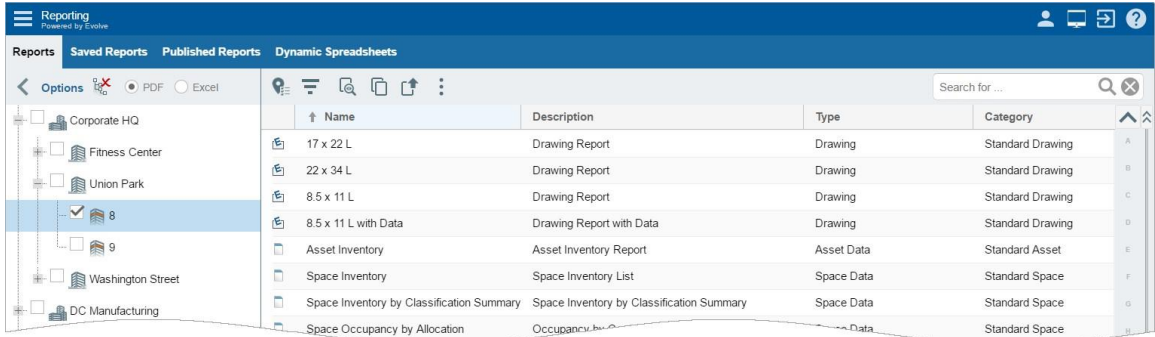
- Calculations
- Charts
- Images
- Graphs
- Text

Programs that create RDL files include SQL Server Reporting Services, Microsoft Visual Studio, and other third-party tools.

# Report Grid



The Report Grid on the Reports page, shows a list of RDL reports available to the user.

**REPORTS PAGE**



# Report Types

The Reporting module generates reports that contain drawing images, and reports that do not contain drawing images. The report types are identified by the icon located next to the report name.

ICON	REPORT TYPE
	Drawing Report
	Data Report

# Working with Reports

## Run a Report

1. On the Reports page, select a report in the report grid.
2. In the Location Tree, select the locations to be included in the report data set.
3. If generating a drawing report, set your Drawing Options as needed.
4. Select your report format, PDF or EXCEL.
5. Click Preview to generate the report.

## Dynamic Spreadsheets

Dynamic Spreadsheets offers both tabular grid reporting and RDL file reporting.

The Configuration Options located in Dynamic Spreadsheets, include additional data filter capability that can be used in combination with the Location Tree filter. Dynamic Spreadsheets additional data filters include:

- The [Advanced Search](#) Filters Panel
- The ability to create and save user defined filters.

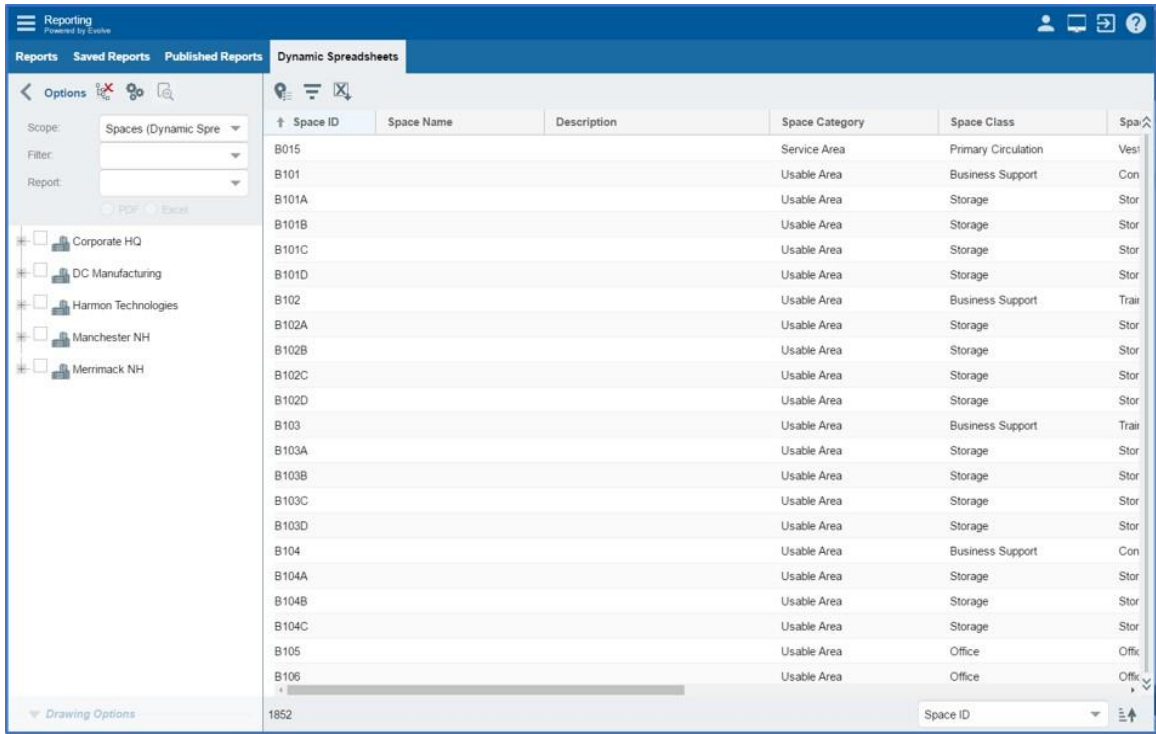
The expanded filtering capability provided in Dynamic Spreadsheets, delivers data flexibility in RDL reports.



# Report Grid

The Dynamic Spreadsheet report grid, is a read-only list of data records.


## DYNAMIC SPREADSHEETS PAGE



## Dynamic Spreadsheet Controls

ITEM	CONTROL	DESCRIPTION
1	Scope	Report data object type selection list (assets, moves, occupants, spaces). The report grid populates with all data records related to the selected scope.
2	Filter	User defined filter list.
3	Report	RDL report file selection list.
4	Manage Filters	Opens the Manage Filters dialog, which is used to create user defined data filters.

## Export to EXCEL

 The Export List control, located on the grid menu, is used to export the report grid data to EXCEL.

# About the Data Scope

The data records in the report grid, are driven by the Scope selection. Options include:

- Assets

- Moves
- Occupants
- Spaces

## Duplicate Data Records Display

It is important to note, that the report grid may include more than one row of data for data objects. For example, spaces can be assigned to one or more business units, therefore if you are displaying space objects and business units together in the report grid, all spaces that are assigned to more than one business unit, will display one row for each business unit assigned to the space.

The image below shows two rows for Space U8-388, since the space is assigned to two different business units, Finance and Human Resources.


↓ Space ID	Space Category	Space Class	Space Sub Class	Area	Property	Building	Floor	Tier 1 Name
U8-388	Usable Area	Business Support	Conference 12	468.00	Corporate HQ	Union Park	8	Finance
U8-388	Usable Area	Business Support	Conference 12	468.00	Corporate HQ	Union Park	8	Human Resources

## About Grid Filters

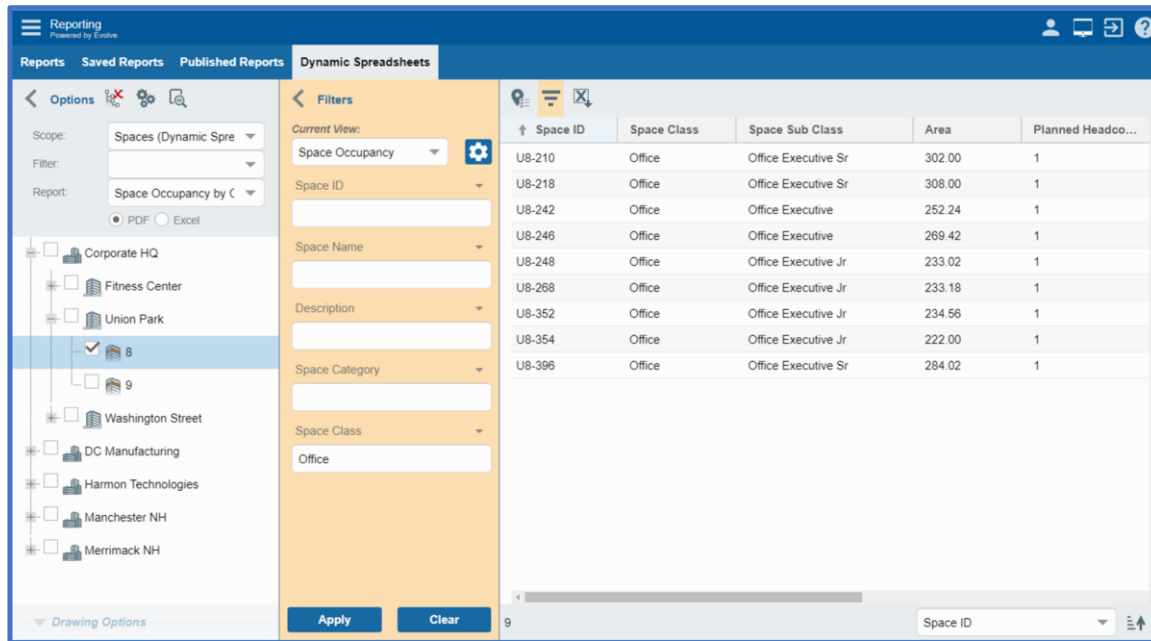
Dynamic Spreadsheets includes the [Advanced Search filters](#), and the ability to create and manage [user defined filter sets](#). Use either one of these search methods (they cannot be used simultaneously) together with the Location Tree, to filter the Dynamic Spreadsheet report grid to the data set needed in your report.

## Filters Panel

Click the Filters icon to expand and display the Advanced Search filters on the Dynamic Spreadsheets grid.

**TIP!** If you are going to use a Grid View, select it on the Filters panel before selecting a user defined filter in the Filter list. The Filters icon 

#### ADVANCED SEARCH FILTER, DYNAMIC SPREADSHEETS



The screenshot shows the 'Dynamic Spreadsheets' configuration window. On the left, the 'Options' panel shows 'Scope: Spaces (Dynamic Spre)', 'Filter: Space Occupancy', and 'Report: Space Occupancy by C'. Below this is a tree view of spaces, with 'Union Park' selected. The 'Filters' panel in the center has a 'Current View' dropdown set to 'Space Occupancy'. It contains several filter fields: 'Space ID', 'Space Name', 'Description', 'Space Category', and 'Space Class' (set to 'Office'). At the bottom of the filters panel are 'Apply' and 'Clear' buttons. On the right, a data grid displays the following information:

Space ID	Space Class	Space Sub Class	Area	Planned Headco...
U8-210	Office	Office Executive Sr	302.00	1
U8-218	Office	Office Executive Sr	308.00	1
U8-242	Office	Office Executive	252.24	1
U8-246	Office	Office Executive	269.42	1
U8-248	Office	Office Executive Jr	233.02	1
U8-268	Office	Office Executive Jr	233.18	1
U8-352	Office	Office Executive Jr	234.56	1
U8-354	Office	Office Executive Jr	222.00	1
U8-396	Office	Office Executive Sr	284.02	1

will be hidden on the grid menu once a user defined filter is selected.

#### Report Attribute & Filter Exclusion Identification

An RDL report file selected in the Report list, may not be configured with all of the data attributes displayed in the report grid, or may be configured with its own data filter configured in the RDL report file.

In cases like this, a server message will display in Dynamic Spreadsheets to make the user aware that the RDL file is not configured with data/filters applied to the grid, so they cannot not be included in the report.

 **Server Message**

Items highlighted in red are not available in the selected report. Red highlighted fields and filters will not be passed to the report.

## User Defined Filters

The Manage Filters dialog is used to create user defined filter sets for use in Dynamic Spreadsheets.

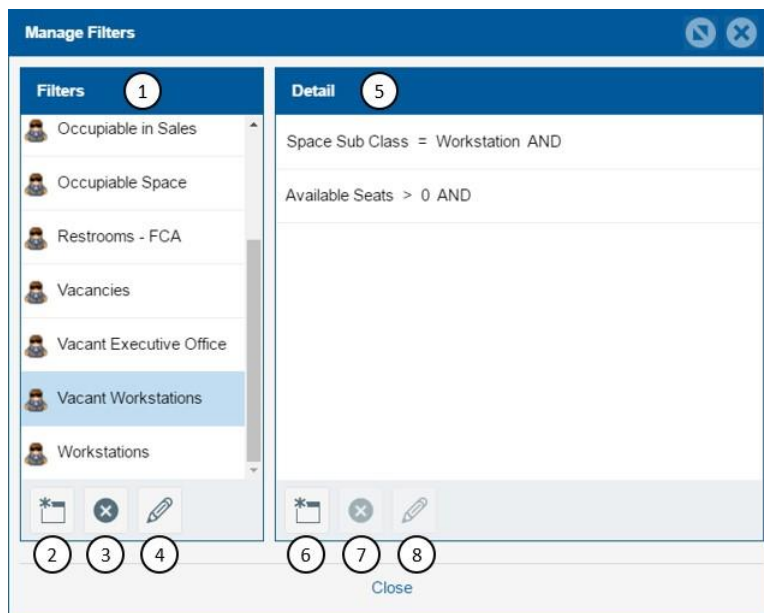
**NOTE!** User defined filter sets are created at the user level in Evolve FM, when a user creates a filter set, it is only available to that user.

### Manage Filters Dialog

The Manage Filters dialog is split into two groups, the Filters group, which is used to manage the filter sets defined by the user, and the Detail group, which is used to configure the search criteria for each filter set.

#### To Open the Manage Filters Dialog

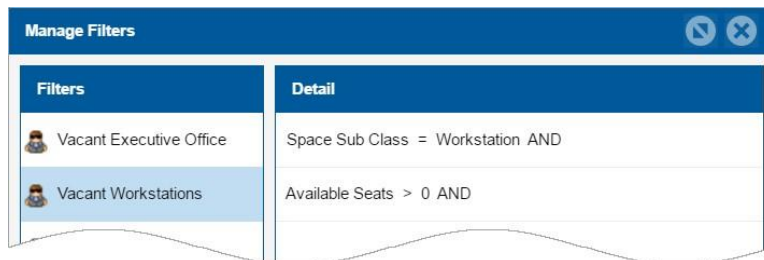
1. On the Dynamic Spreadsheets Configuration Options panel, click the [Manage Filters icon](#).

**MANAGE FILTERS DIALOG**

ITEM	CONTROL	DESCRIPTION
1	Filters Group	A list of data filters created by the user, and the Filters group controls (2-4).
2	Add (filter)	Click to add a new data filter.
3	Remove (filter)	Click to remove a selected data filter.
4	Edit (filter)	Click to edit a selected data filter.
5	Detail Group	The search criteria in a selected data filter, and the Detail group controls (6-8).
6	Add (detail)	Add a new search criteria statement to a selected data filter.
7	Remove (detail)	Remove a selected search criteria statement.
8	Edit (detail)	Edit a selected search criteria statement.

**About Search Criteria Statements**

The image below illustrates a two-line search criteria statement configured in the Detail group.



When the search is executed, Evolve FM will process the search criteria one line at a time, first to last, to qualify data that meets the criteria set in the statement.

Each line of a search criteria statement is comprised of the following items.

CONTROL	NOTE
Space Attribute	The space data attribute to be used in the search.
Operator	The operator to be assigned to the Value of the attribute.
Value	The attribute's data value to be used in the search.
Connector	<p>A relational operator (AND or OR) to connect each line of the search criteria statement.</p> <ul style="list-style-type: none"> <li>- The AND operator displays a record if all the conditions separated by AND is TRUE.</li> <li>- The OR operator displays a record in any of the conditions separated by OR is TRUE.</li> </ul>

## About Relational Operators


Search criteria relational operators are used to link the space data Attribute to the Value.

OPERATOR	DESCRIPTION	CRITERIA DATA TYPE
<	Less than	Numeric
<=	Less than or equal to	Numeric
<>	Not Equal to	Alphanumeric
=	Equal to	Alphanumeric
>	Greater than	Numeric
>=	Greater than or equal to	Numeric
Like	Match a portion of the Value	<p>Use the LIKE operator with the wildcard symbol % (percent) added to the Value field. Examples:</p> <ul style="list-style-type: none"> <li>• LIKE office% will find data beginning with the word "office".</li> <li>• LIKE %office will find data ending with the word "office".</li> <li>• LIKE %office% will find data containing the word "office".</li> </ul>

# Working with Dynamic Spreadsheets

## Run a Report from Dynamic Spreadsheets

### Export Report Data to EXCEL

1. In the Scope List, select the data set needed.
2. Arrange your Grid View as needed.
3. Filter the report grid using either of the following filter methods:
  - The Location Tree.
  - The filter controls on the Filters panel, or the Filter selection list (user defined filters).
4. On the grid menu, click Export .

### Run an RDL Report from Dynamic Spreadsheets

1. In the Scope list, select the data set needed.
2. Filter the report grid using either of the following filter methods:
  - The Location Tree.
  - The filter controls on the Filters panel, or the Filter selection list (user defined filters).

3. In the Report list, select the report.
4. If generating a drawing report set your Drawing Options as needed.
5. Select your report format, PDF or EXCEL.
6. Click Preview to generate the report.

## Create a User Defined Filter

1. On the Dynamic Spreadsheets Configuration Options panel, click the Manage Filters control.
2. On the Manage filters dialog, in the Filters group, click Add.
3. Enter the name of your filter.
4. Optional: Enter a description of your filter.
5. Click Save.

### ***Build the search criteria statement***

6. In the Filter group, select your filter name.
7. In the Detail group, click Add.
8. Select the data Attribute to be used as the search data set.
9. Select the search Operator.
10. Enter the data Value to be searched.
11. In the Connector field, do one of the following:
  - If you are not adding an additional search criteria statement, move to step 12.
  - Select the AND or the OR Operator to connect the next line in a multi-line statement.
12. Click Save.
13. Repeat steps 7-12 for each additional line in your search criteria statement.
14. Click Close

## Apply/Clear a User Defined Filter

### ***Apply a User Defined Filter to the Report Grid***

1. In the Filters list, select the filter to be applied.

### ***Clear a user defined filter from the Report Grid***

1. In the Filters list, select None.

## Edit/Delete a User Defined Filter

### ***Edit the Name of the Filter***

1. On the Dynamic Spreadsheets Configuration Options panel, click the Manage Filters control.

2. On the Manage filters dialog, in the Filters group, select the filter name to be edited.
3. On the Filter group menu, click Edit.
4. Edit the name of the filter.
5. Click Save. **Delete a**

***filter***

1. On the Dynamic Spreadsheets Configuration Options panel, click the Manage Filters control.
2. On the Manage filters dialog, in the Filters group, select the filter name to be deleted.
3. On the Filter group menu, click Remove.

***Edit a search criteria statement***

1. On the Dynamic Spreadsheets Configuration Options panel, click the Manage Filters control.
2. On the Manage filters dialog, in the Filters group, select the filter name to be edited.
3. On the Detail group, select the criteria statement to be edited.
4. On the Detail group menu, click Edit.
5. Edit the statement as needed.
6. Click Save.

***Delete a search criteria statement***

1. On the Dynamic Spreadsheets Configuration Options panel, click the Manage Filters control.
2. On the Manage filters dialog, in the Filters group, select the filter name to be edited.
3. On the Detail group, select the criteria statement to be deleted.
4. On the Detail group menu, click Remove.