CAFM Resources

Quick Start Guide
Get Up and Running with Evolve

CAFM Resources

Contents

1. Getting Started

Evolve **Quick Start** was developed to help you get up and running quickly. There is no better way to build confidence in our solutions, and your ability to manage them, then to have you up and running within minutes of gathering together the core of your facility information. While this guide is extensive and detailed, the fact of the matter is it takes only three clicks of the mouse to go from an empty system, to working with the data for the people, places and things that make your facilities what they are.

With Evolve it will take you longer to gather together your data and drawings, (if you have or need then), then it takes to load all that information into Evolve. Quick Start breaks through the technical barriers that have traditionally stood between you and the successful implementation of a facility management solution.

Quick Start: Step-by-Step

1. Watch the Quick Start video for an overview of the process
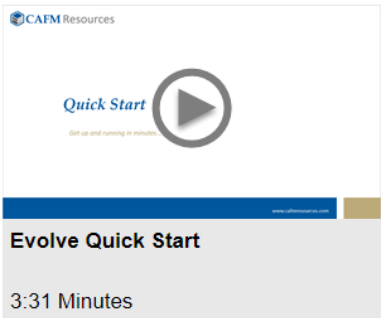2. Download the Quick Start package
3. Complete the spreadsheets in the Quick Start package
4. Prepare your floor plans, if you have or need them
5. Bundle your completed spreadsheets and floor plans into a .zip file
6. Upload the zip file to Evolve
7. Start managing your facility data

1.1.   Watch the Video

In addition to this guide, the Evolve Quick Start page has a link to a video that provides an overview of the process. Additionally, the Evolve Learning Center has several short, valuable, lessons on how to use Evolve and how to get the most value out of your facility data. Spending a few minutes watch these videos could save you hours of time working through the many features in the Evolve platform.

2. Download the Quick Start Package

If your reading this guide, you have likely already downloaded the Quick Start package. If you haven't already downloaded the package, you can do so by clicking the "**Download Quick Start Package**" button on the Step One page of Quick Start. The package includes:

- This Quick Start Guide
- A My Evolve Data Spreadsheet
- A My Evolve Assets Spreadsheet
- A My Evolve Drawings Spreadsheet

These files and any drawings, should you need or want them, is all that is needed to get up and running quickly.

3. Adding Your Data

To successfully populate the Evolve platform, at least one of the three, completed, spreadsheets must be contained in the .zip package you upload back to the Evolve Platform through Quick Start. The more data you provide, the more useful the platform will be. You will always can upload additional data, or more detail associated with existing data. However, there is no easier way to get up and running than to include as much data as you can in the initial Quick Start upload.

These three text files are formatted as tab delimited files. You can use Excel, or any other spreadsheet application, capable of reading and writing tab delimited files, to enter data into these files. There are a few basic steps to follow:

1. Open one of the text files with Excel, or some other spreadsheet application
2. Enter your data into the columns, (see following sections for details)
3. Before saving the file, format all cells as Text

> This step is **important** because many spreadsheet applications will attempt to format numerical values as numbers. This can result in the loss of leading and trailing "0".

4. Save the file in a tab delimited format

The remainder of this section will describe each column in each spreadsheet, what values they should contain, and how the values are used.

3.1.   My Evolve Data

The My Evolve Data spreadsheet is used to quickly upload and populate data associated with spaces. Space attributes and classifications, occupants of those spaces and the cost centers to which they are assigned is all created from this single spreadsheet. This spreadsheet is the most frequently used with Quick Start.

What do the Numbers Mean?

You will notice that each column header of the spreadsheets is followed by a number contained in parenthesis. These numbers are "short hand" used by Evolve to map the data in your spreadsheet to the attributes in the Evolve Platform. You should **never** change the values in column headers. You will later learn how to alias any field in Evolve to match your desired terminology.

3.1.1. Spreadsheet Columns

Below is a brief description of the columns contained in the My Evolve Data spreadsheet.

Property (required)
The Evolve platform supports a four-tier location hierarchy. This field is used as the unique identifier to distinguish one property record from another. Any alphanumeric value may be entered in this field. An example of a location hierarchy might look something like this:

- **Central Square**
  - Research Center
    - Level 2
      - 1001
      - 1002

Central Square would be an example of a Property.

Building (required)

This field is used as the unique identifier to distinguish one building record from another. Any alphanumeric value may be entered in this field. An example of a location hierarchy might look something like this:

- Central Square
  - **Research Center**
    - Level 2
      - 1001
      - 1002

Research Center would be an example of a Building.

Floor (required)

This field is used as the unique identifier to distinguish one floor record from another. Any alphanumeric value may be entered in this field. An example of a location hierarchy might look something like this:

- Central Square
  - Research Center
    - **Level 2**
      - 1001
      - 1002

Level 2 would be an example of a Floor.

Space ID (required)

This field is used as the unique identifier to distinguish one space record from another. Any alphanumeric value may be entered in this field. An example of a location hierarchy might look something like this:

- Central Square
  - Research Center
    - Level 2
      - **1001**
      - **1002**

1001 and **1002** would be examples of a Space ID.

Space Name (optional)

This field is generally used to convey a plain English name of the space. This field can be used to as an additional unique identifier, like (Reading Room 101), or as a general term, like (Reading Room).

Description (optional)
This field may be used to document a detailed description of an asset.

Space Category (optional)
This is the first of three levels of cascading classifications for your spaces. As an example, you may want to classify your office spaces something like this:

- **Office**
  - Private Office
    - Executive (Small)
    - Executive (Large)

Office would be an example of a Space Category.

Space Class (optional)
This is the second tier of cascading classifications for your spaces. As an example, you may want to classify your office spaces something like this:

- Office
  - **Private Office**
    - Executive (Small)
    - Executive (Large)

Private Office would be an example of a Space Class.

Space Sub Class (optional)
This is the third tier of cascading classifications for your spaces. As an example, you may want to classify your office spaces something like this:

- Office
  - Private Office
    - **Executive (Small)**
    - **Executive (Large)**

Executive (Small) and **Executive (Large)** would be examples of a Space Sub Class.

Area (optional)
This is field is used to display the area, (square footage), of a space. If you are bringing in CAD drawings with your Quick Start upload, you do not need to populate this field, it will be populated from the area information contained in the drawing.

Planned Headcount (optional)
This is field is used to display the planned headcount, (seating capacity), of a space. Use this field if utilization is something you want to track.

Cost Center Number (optional)
If you track the cost centers, (departments, groups, etc.), assigned to a space. If your cost centers do not have numbers, you do not need to populate this field.

Cost Center Name (optional)
If you track the cost centers, (departments, groups, etc.), assigned to a space. If your cost centers do not have names, you do not need to populate this field.

Occupant First Name (optional)
If you want to assign a person to a space, you can enter the occupant's first name here.

Occupant Last Name (optional)
If you want to assign a person to a space, you can enter the occupant's last name here.

Employee ID (optional)
If you want to assign a person to a space, and you use a unique alphanumeric value to identify people, you can enter that value here.

3.2.   My Evolve Assets

If assets are important to your management process, you can use the My Evolve Assets.txt file to document and import these assets to the Evolve platform.

3.2.1. Spreadsheet Columns

Below is a brief description of the columns contained in the My Evolve Assets spreadsheet.

Asset ID (required)
This field is used as the unique identifier to distinguish one asset record from another. Any alphanumeric value may be entered in this field. If you don't already have one, developing a naming convention strategy is always a good idea. This will help to insure consistency in your facility data.

Asset Name (optional)
This field is generally used to convey a plain English name of the type of assets. This field can be used to as an additional unique identifier, like (Mesh Chair 101), or as a general term, like (Mesh Chair).

Description (optional)
This field may be used to document a detailed description of an asset.

Asset Category (optional)
This is the first of three levels of cascading classifications for your assets. As an example, you may want to classify your office chairs something like this:

- **Office Furniture**
  - Chairs
    - Mesh-Back
    - Leather

Office Furniture would be an example of an Asset Category.

Asset Class (optional)
This is the second tier of cascading classifications for your assets. As an example, you may want to classify your office chairs something like this:

- Office Furniture
  - **Chairs**
    - Mesh-Back
    - Leather

Chairs would be an example of an Asset Class.

Asset Sub Class (optional)

This is the third tier of cascading classifications for your assets. As an example, you may want to classify your office chairs something like this:

- Office Furniture
  - Chairs
    - **Mesh-Back**
    - **Leather**

Mesh-Back and **Leather** would be examples of an Asset Sub Class.

Property (optional)

If you know the location of your assets, you can associate your assets with their locations by entering values into the location fields. The Evolve platform supports a four-tier location hierarchy. An example of a location hierarchy might look something like this:

- **Central Square**
  - Research Center
    - Level 2
      - 1001
      - 1002

Central Square would be an example of a Property.

Building (optional)

If you know the location of your assets, you can associate your assets with their locations by entering values into the location fields. The Evolve platform supports a four-tier location hierarchy. An example of a location hierarchy might look something like this:

- Central Square
  - **Research Center**
    - Level 2
      - 1001
      - 1002

Research Center would be an example of a Building.

Floor (optional)

If you know the location of your assets, you can associate your assets with their locations by entering values into the location fields. The Evolve platform supports a four-tier location hierarchy. An example of a location hierarchy might look something like this:

- Central Square
  - Research Center
    - **Level 2**
      - 1001
      - 1002

Level 2 would be an example of a Floor.

Space ID (optional)

If you know the location of your assets, you can associate your assets with their locations by entering values into the location fields. The Evolve platform supports a four-tier location hierarchy. An example of a location hierarchy might look something like this:

- Central Square
  - Research Center
    - Level 2
      - **1001**
      - **1002**

1001 and **1002** would be examples of a Space ID.

3.3.   My Evolve Drawings

If you have CAD drawings that represent floor plans, or images that you want to later turn into interactive floor plans, use the My Evolve Drawings.txt file to populate information about these drawings and images.

3.3.1. Spreadsheet Columns

Below is a brief description of the columns contained in the My Evolve Drawings spreadsheet.

Property (required)
The Evolve platform supports a four-tier location hierarchy. This field is used as the unique identifier to distinguish one property record from another. Any alphanumeric value may be entered in this field. An example of a location hierarchy might look something like this:

- **Central Square**
    - Research Center
        - Level 2
            - 1001
            - 1002

Central Square would be an example of a Property.

Building (required)
This field is used as the unique identifier to distinguish one building record from another. Any alphanumeric value may be entered in this field. An example of a location hierarchy might look something like this:

- Central Square
    - **Research Center**
        - Level 2
            - 1001
            - 1002

Research Center would be an example of a Building.

Floor (required)

This field is used as the unique identifier to distinguish one floor record from another. Any alphanumeric value may be entered in this field. An example of a location hierarchy might look something like this:

- Central Square
    - Research Center
        - **Level 2**
            - 1001
            - 1002

Level 2 would be an example of a Floor.

Space ID (optional)

NOTE

This filed is only used to import images to OnPoint. This field will be ignored when importing Drawings, (.dwf files), into Evolve FM.

This field is used as the unique identifier to distinguish one Space record from another. Any alphanumeric value may be entered in this field. An example of a location hierarchy might look something like this:

- Central Square
    - Research Center
        - Level 2
            - **1001**
            - **1002**

1001 and **1002** would be examples of a Space ID.

File Name (optional)

Use this field to document the name of the .dwf file or image file that will be used as a floorplan.

Title (required for OnPoint)

> **NOTE**
>
> This filed is only used to import images to OnPoint. This field will be ignored when importing Drawings, (.dwf files), into Evolve FM. This field is required when importing images to OnPoint.

This field is used as to display an image title in the OnPoint location hierarchy tree. Any alphanumeric value may be entered in this field.

Is360 (Optional)

> **NOTE**
>
> This filed is only used to import images to OnPoint. This field will be ignored when importing Drawings, (.dwf files), into Evolve FM.

This field is used as to display an image title in the OnPoint location hierarchy tree. The acceptable values for this field are:

- **true**   (Image will be processed as a 360^0 panoramic image)
- **false**   (Image will be displayed as a traditional image file)
- No Value   (Image will be displayed as a traditional image file)

About Drawing Files

If you use the My Evolve Drawings spreadsheet to list your drawing files, these files must be included in the zip file uploaded to Evolve through Quick Start.

4. Upload the Quick Start Package

Once you have completed the desired spreadsheets, package the spreadsheets, and any drawing files or image files you may have, into a .zip package. Using Evolve Quick Start, follow the onscreen instructions for uploading the completed package.

5. Start Using Evolve

That's all there is to it. With your initial data upload to Evolve you are ready to begin managing and reporting on your facility information. For detailed information on how to use Evolve, see the user guides found in the help section of the application.

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6. Frequently Asked Questions

Below are a few frequently asked questions that come from users new to Evolve.

- **We use different terms to describe locations and other things, can I change these terms?**

  Yes, Evolve has a complete and extensive aliasing feature that allows you to change any term used in the platform to match the terms used in your organization. For the purposes of Quick Start, you should **never** change the terms used in the spreadsheet column headers. You can change the terms in the system after using Quick Start.

- **The Quick Start spreadsheets only accommodate basic information, how do I add more detail?**

  Evolve provides spreadsheet imports for every core data collection in the platform. Quick Start, as the name implies, is focused on getting you up and running quickly. You can add additional details to the people, places and things that make up your facilities later. If you have detailed information available, you can bypass Quick Start and import detailed information using the individual grids for spaces, assets, drawings and people.

- **Are CAD drawings required to use Evolve?**

  No, in fact, Evolve can effectively manage your facility data without drawings of any kind. The benefit of drawings is the visualization of data they provide. Drawings can be added at any time. Additionally, unlike other similar solutions, Evolve will allow you to use images to create interactive drawings. If you use Quick Start to import your property, building and floor data, a "Grid Drawing", will be created for any floors that do not have an assigned drawing.

7. Appendix A (Drawings in Evolve)

Evolve allows the import of DWF files and image files to be used as "Drawings". Most often DWF files are produced form AutoCAD, AutoCAD Architecture ore Revit. DWF files may contain polylines, that represent spaces and blocks that represent equipment, assets, furnishings and other building elements. Depending upon that application used to create these files, there could be additional "attribution" data associated with the elements in these files.

The following sections provide a brief description of the applications and files used within evolve and how to prepare your drawings for use in Evolve.

7.1.   AutoCAD

With AutoCAD drawings, you must create a polyline to define each space in the drawing. This polyline can be "paint-to-paint", (net area), or "centerline-to-centerline", (gross area), the option is yours. These space polylines should all be on the same layer, with no other geometry on that layer. Inside of each polyline, should be a simple text element which displays a room number, (Space ID). These room numbers should all be on the same layer with no other objects on that layer.

Polyline Requirements
- Polyline width = 0. No 3D polylines.
- Polylines must be at Elevation 0.0.
- Polylines must be CLOSED.
- No polylines within the boundary of another polyline.
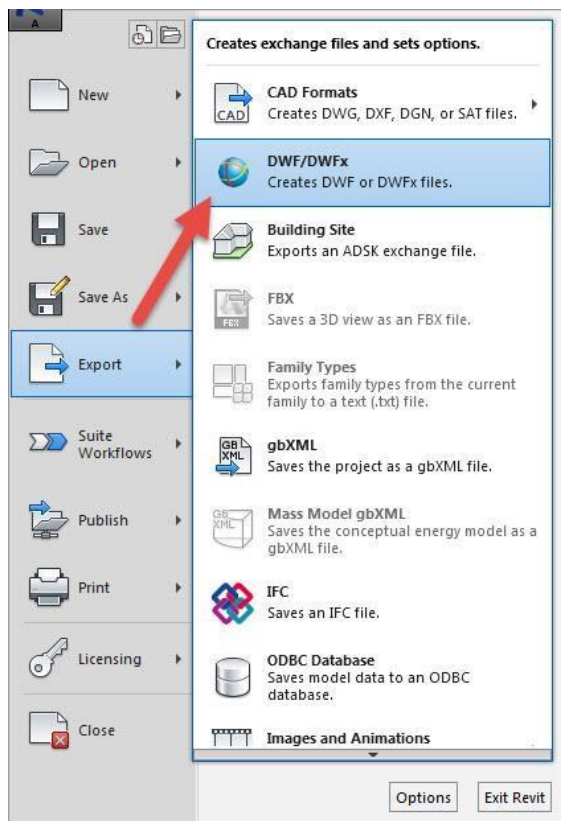-

Space ID Requirements
- All Space ID text in a drawing must be unique to that drawing (no duplicate text).
- Text must be AutoCAD Single Line Text.
- Text must be at Elevation 0.0.
- Justify text Middle Center (optional).
- Place text in center of polyline (text must fit completely inside its polyline boundary).

Simple FM Tools is a free download from the Autodesk App Store. This plugin provides a simple set of tools needed to tag the polylines as spaces and export your AD drawing to a DWF file that can be used in Evolve. For more information on this process, refer to the Simple FM Tools User Guide. In addition to the free version, there is a professional version of Simple FM Tools that provides a bunch of handy tools to make numbering and checking polylines a breeze.
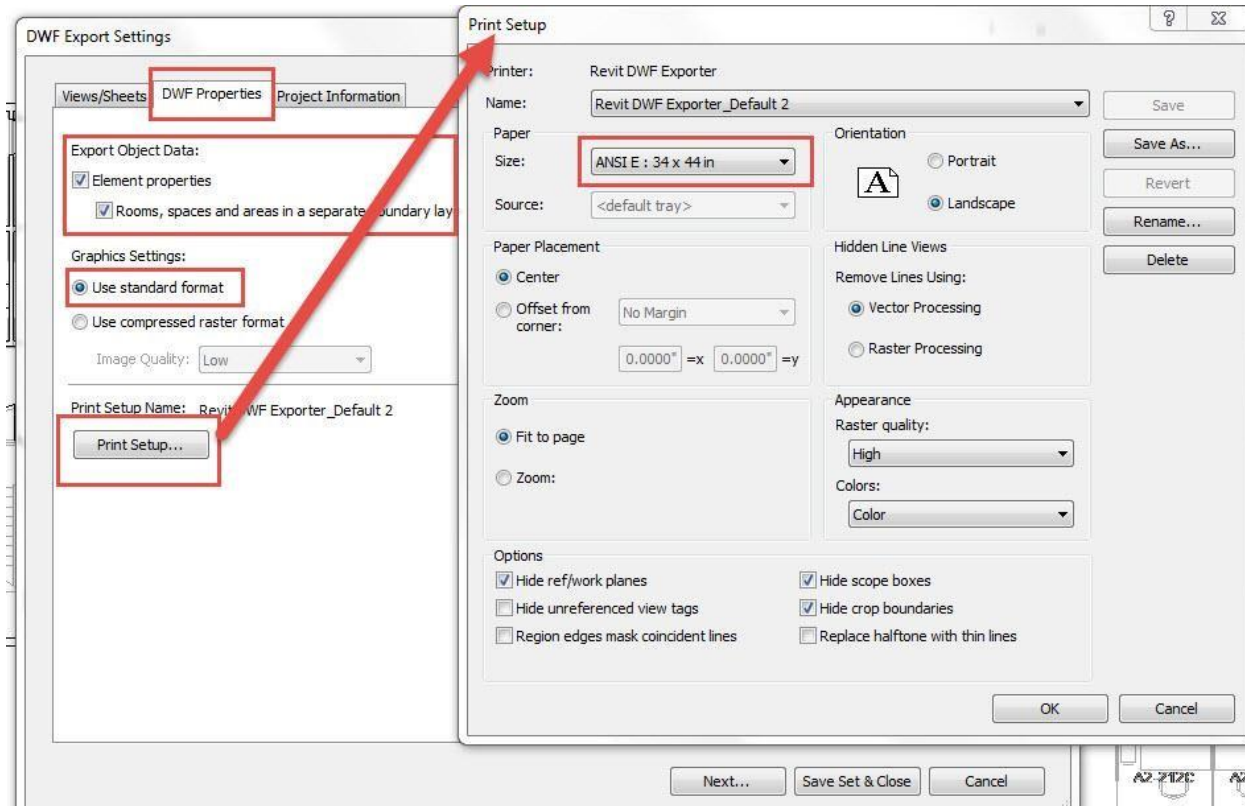
7.2.   AutoCAD

With Revit, the process of preparing and exporting your drawing files is very straight forward. Be sure to add room objects to all your rooms. When exporting to a DWF file, do the following:

1. Select a floorplan view from the list of available views. You will need to export a separate DWF file for each floor.

2. Evolve requires a 2D single sheet DWF from Revit for import. As long as your model is non-isometric on the screen at time of export, it should export as 2D. Also, when selecting the file format for export, be sure it is DWF, not DWFX.

3. On the DWF Export Settings dialog, be sure to select the following options:

    a. Element Properties

    b. Rooms, spaces and areas in a separate boundary layer

c. Use standard format

4. Click the **Print Setup** button

5. On the Print Setup dialog, the important setting is the paper size, as it can affect the quality of the drawing that gets delivered when doing graphical reports in Evolve. A "C" or "D" paper size selection is recommended. Once you have a print setup you like you can save it as a template for future use.

6. Click **OK** to close the Print Setup dialog

7. Click **Next** to publish to a DWF file

8. The last step is to give your file a name, assign a folder to save it to, make sure the export file format selected is **DWF**, then click **OK** to export the file.

7.3. AutoCAD

The Quick Start feature of Evolve will create a simple grid of spaces for all floors create during the initial import that do not have associated drawings or images. These grid drawings are only created when using Quick Start. You can import a valid drawing or image file to replace these grid drawings at any time.

7.4. Auto-Generated Grid Drawings

The Quick Start feature of Evolve will create a simple grid of spaces for all floors create during the initial import that do not have associated drawings or images. These grid drawings are only created when using Quick Start. You can import a valid drawing or image file to replace these grid drawings at any time.