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Introduction

This User Guide is designed to help the user understand the functionality of the Space Management module. It explains the module from a conceptual standpoint and it offers step-by-step instructions to help the user learn how to quickly enter data and save records to the system.

Each chapter is specific to one screen in the module and contains Parts 1 and 2 as follows:

Part 1: The conceptual Part I explains the screen as well as its functionality throughout the system.

Part 2: The step-by-step Part II is a guide to creating transactions and performing tasks while working in the screen.

The Appendix at the end of the guide explains each of the setup screens for configuring the validated data that will be made available in the drop-downs and lists within the module as a whole.
Chapter 1: Organizational Occupancy Screen

Chapter 1 Part 1 Organizational Occupancy Screen Conceptual Guide

The Organizational Occupancy screen is used for tracking Organizational Space Occupancy in the system. It defines what Organization is located where, what percentage of the space the organization occupies and how the space is used.

Title Block

The Location field denotes the Location id. This is not editable. The Id is set up in the Property Module. A search must be executed to find all available locations to edit. The Description is a brief explanation of the location. The Description is optional and also defined in the Property Module.

Status Block

The Status field indicates the current location status. This is not editable. The Statuses are defined in the Property Module. The Status field indicates the primary use for the location. The Floor field indicates the floor identification associated to the building. An AutoCAD™ drawing is associated to the Floor Id.

Property Block

A Properties are organized into a 4 level hierarchy; Region, Facility, Property, and Location. These are defined in the Property Module. The Region field indicates the region that is associated with the location. The Facility field indicates the facility within a region that is associated with the location. The Property field denotes the property located within a facility within a region that is associated with the location. This is not editable.

Organizational Occupancy Sub-Screen

This screen is used to assign organizations to specific locations (spaces). The organization is the bottom tier of a 3 tier hierarchy. The levels are defined by Institution, Department, and Organization.
The Organization field denotes the organization assigned to the specific location. A location can have multiple organizations assigned to one location.

The Description field denotes a brief explanation of the organization.

The Institution field indicates the institution association of the organization.

The Department field denotes the department associated to the institution of the organization.

The Percent field denotes the percentage of occupancy of the space. This can be the physical SQFT percent or a time percentage.

The Start Date indicates the start date of the organizations occupation of the location (space).

The End Date denotes the end date of the organizations occupation of the location (space).

The Edit Date indicates the date of the last saved changes to the record.
Chapter 1 Part 2 Organizational Occupancy Step-By-Step Quick Guide

1. Click Insert enter a new record.
2. Enter the Company, Department, and Org Code, and Percent Occupancy (this must be <=100%)
3. Select a From Date, and optionally a To Date for occupancy.
4. If you wish, you may enter Usage Codes in the detail. You may enter as many as you wish, but they must total 100%.

Usage Code Screen

The Occupational Occupancy Usage window is available in the detail. Select the plus icon.

1. Select a Usage Code Zoom Icon (Note: You may enter as many as you wish, but they must total 100%).
2. Navigates to the usage code selection screen. Select desired usage code.
3. Returns to the Usage Screen.
4. Enter percent of usage.
5. Enter Square Footage. (optional)
6. Enter Start Date (optional)
7. Enter End Date (optional)
8. Select Done icon, navigates back to the Organization Occupancy Screen.
9. Select Done icon, navigates back to the Organizational Screen.
10. Select Save Icon. Saves Record.
11. Select the Done Flag icon.
12. Save the Record
Chapter 2: Program Location Screen

Chapter 2 Part 1 Program Location Screen Conceptual Guide

The Program Location screen is used for tracking Institutional Programs in the system. It defines what Institutional Program is located where and what percentage of the space the program occupies.

Title Block

The Location field denotes the Location id. This is not editable. The Id is set up in the Property Module. A search must be executed to find all available locations to edit. The Description is a brief explanation of the location. The Description is optional and also defined in the Property Module.

Status Block

The Status field indicates the current location status. This is not editable. The Statuses are defined in the Property Module. The Location Type field denotes the location type. The Primary Usage field indicates the primary use for the location. The Floor field indicates the floor identification associated to the building. An AutoCAD™ drawing is associated to the Floor Id.

Property Block

A Properties are organized into a 4 level hierarchy: Region, Facility, Property, and Location. These are defined in the Property Module. The Region field indicates the region that is associated with the location. The Facility field indicates the facility within a region that is associated with the location. The Property field denotes the property located within a facility within a region that is associated with the location. This is not editable.

Program Screen

The Program Screen is utilized to define specific Institutional Programs utilizing the location (space).
The Program field denotes the Instructional program id. The Description denotes a brief explanation of the Institutional Program.

The Square footage indicates the total square footage used by the program.

The Percent field denotes the percent of usage for the program for the location.

The Start Date indicates the starting date for the program in the location. The End Date denotes the ending date for the program in the location (space).
Chapter 2  Part 2  Program Location Step-By-Step Quick Guide

1. Query desired Property.
2. Select Location from Property Query Screen.
3. Click the Edit Icon.
4. On the Program Block, Select the add icon (Plus Sign)
5. The system navigates to the Program Screen
6. Click Program zoom icon
7. System navigates to the program selection screen.
8. Click desired program.
9. System navigates back to the program screen.

Optional: Square Footage Information

10. Enter Square Footage information.
11. Enter Percentage.
12. Select Start date.

Optional: End Date Information

13. Select End date.
14. Click Done icon.
15. System navigates back to the Program Location screen.
16. Select the Save Icon. Saves Record
17. Select the Done Flag icon.
18. Save the Record
Chapter 3: Grant Location Screen

Chapter 3 Part 1 Grant Location Screen Conceptual Guide

The Grant Location screen is used for tracking Institutional Grants activities in the system. It defines where Grant activities are located and what percentage of the space is being utilized for the Grant activities.

**Title Block**

The Location field denotes the Location id. This is not editable. The Id is set up in the Property Module. A search must be executed to find all available locations to edit. The Description is a brief explanation of the location. The Description is optional and also defined in the Property Module.

**Status Block**

The Status field indicates the current location status. This is not editable. The Statuses are defined in the Property Module. The Location Type field denotes the location type. The Primary Usage field indicates the primary use for the location. The Floor field indicates the floor identification associated to the building. An AutoCAD™ drawing is associated to the Floor Id.

**Property Block**

A Properties are organized into a 4 level hierarchy; Region, Facility, Property, and Location. These are defined in the Property Module. The Region field indicates the region that is associated with the location. The Facility field indicates the facility within a region that is associated with the location. The Property field denotes the property located within a facility within a region that is associated with the location. This is not editable.

**Grants Screen**

The Grants Screen is utilized to identify specific Institutional Grants utilizing the location (space).
The Grant field denotes the Instructional Grant id. The Description denotes a brief explanation of the Grant.

The Square footage indicates the total square footage used by the Grant.

The Percent field denotes the location percentage of usage by the Grant.

The Start Date indicates the starting date for the Grant activities in the location. The End Date denotes the ending date for Grant activities in the location (space).
Chapter 3, Part 2: Grant Location Step-By-Step Quick Guide

1. Query desired Property.
2. Select Location from Property Query Screen.
3. Click the Edit Icon.
4. On the Grants, Select the add icon (Plus Sign)
5. The system navigates to the Grants Screen
6. Click Grant zoom icon
7. System navigates to the grant selection screen.
8. Click desired grant.
9. System navigates back to the program screen.

Optional: Square Footage Information

10. Enter Square Footage information.
11. Enter Percentage. (Note: Percentage must add up to 100 for location)
12. Select Start date.

Optional: End Date Information

13. Select End date.
14. Click Done icon.
15. System navigates back to the Grant Location screen.
16. Select the Save Icon. Saves Record
Chapter 4: Space Survey Screen

Chapter 4 Part 1  Space Survey Screen Conceptual Guide

The Space Survey screen is used for Surveying Space activities. This screen is used to define and execute Space Surveys. The screen is used to survey Organization Occupancy and where Program and Grant activities are located, and what percentage of the space is being utilized for the Grant activities.

Title Block
The Space Survey field denotes the Survey id. This is not editable. The Description is a brief explanation of the location. The Description is required.

Status Block
The survey status indicates the current condition of the survey. The survey status zoom list is based on the established work flow. The Type field denotes the method of survey. There are three choices; Property, Organization, Principle Investigator. The Property type indicates the survey is to be organized by Property. The Organization type indicates the survey is to be organized by Organizational Hierarchy. The Principle Investigator denotes the survey is to be organized by the principle investigator.

The Survey Date field indicates the date the survey was initiated. The Template field denotes the Survey Template used to create the survey. This is optional and is only populated if the Survey Generator is utilized. If populated, this is a hyperlink that leads to the Survey Template detail screen.

Property Block
The Property blocks denotes at survey property. All Properties are organized into a 4 level hierarchy; Region, Facility, Property, and Location. These are defined in the Property Module. The Region field indicates the region that is associated with the location. The Facility field indicates the facility within a region that is associated with the location. The Property field denotes the property located within a facility within a region that is associated with the location.

Survey Totals Block
The Survey field indicates the number of surveys to be completed for the property. This field auto populates based on the number of spaces to survey.

The Verified field indicates the number of surveys verified. The field auto populates by status changes made by the surveyor.

The Changed field denotes the number of surveys where information has been changed. This field auto populates by changes made by the surveyor.

The Remaining field indicates the number of surveys remaining to be completed. This field auto populates the Total Surveys minus the Verified and Changed surveys.

**Approvals Totals Block**

The Processed Updates field denotes the number of Surveys approved and automatically updated the database. This field is not editable.

The Manual Updates field indicates the number of Surveys that will require manual updates to the database. This is caused by incomplete or inconsistent data.
Survey Location Screen

The Survey Location Screen summarizes the details of the individual location (space) surveys.

The Location field indicates the location (space) to be surveyed. This is a hyperlink that leads to the screen to make the appropriate changes.

The Floor Field indicates the floor of the property where the location (space) is located. The Region field indicates the region that is associated with the location. The Facility field indicates the facility within a region that is associated with the location. The Property field denotes the property located within a facility within a region that is associated with the location.

The Location Type field indicates the assigned location type associated with the location (space). This is one of the fields that is verified and/or updated during the survey.

The Status field denotes the survey status for the associated location (space). There are three statuses; Awaiting Survey, Verified, Changed. Awaiting Survey status denotes the location has not yet been surveyed. The Verified status indicates the location has been surveyed and no changes were made to the location information. The Changed status indicates the location has been surveyed and changes were made to the location information.
Create New Space Survey

1. Click Insert on the menu bar to enter a new record.
2. Enter the survey Description.
3. Select Survey Type (Property, Organization, or Principle Investigator).
   a. Property – Property based survey
   b. Organization – Organization based survey
4. Enter Region, Facility, and Property for Property Survey Type. (Institution, Department, and Organization for Organization Survey Type) (Principle Investigator for Principle Investigator Survey Type).
5. Select Load (loads locations).
7. Change Survey Status to SURVEYING.
8. Select the Save icon. The Space Survey is saved.

Edit Space Survey

Edit the Space Survey to facilitate the updating space data inventory and utilization information

1. Click Edit on the menu bar to edit a Survey.
2. Select Location to edit.
3. Select Location to edit.
4. Select Location Data to Edit / Update Location Information.
5. Select Organizational Occupancy to Edit / Update Organizational Information.
6. Update Organizational Occupancy
7. Update Usage
8. Click Usage zoom icon
10. Select appropriate usage code.
11. Click Done Icon.
12. System Navigates back to usage screen
13. Enter percentage. (Note: Location must add up to 100)
14. Select Done Icon
15. System Navigates back to the Organizational Occupancy Screen.
16. Change Survey Status by selecting Status pick box.

Status Definitions
   o Awaiting Survey – Awaiting Survey
   o Verified – Information Verified but not changed
   o Changed – Information Changed

17. Select Program Location to Edit / Update Program Information
18. Select Grant Location to Edit / Update Grant Information.
19. Select Occupants to Edit / Update Occupant Information.
20. Select Save Icon to save Survey
Complete Space Survey

Complete the Space Survey to facilitate the updating space data inventory and utilization information

1. Click Edit on the menu bar to edit a Survey.
2. Change Survey to an Approved Status
3. Save Survey

Status Definitions:
   o Verified – Not data changed
   o Processed – Data automatically changed.
   o Manual Rework – Data must be manually changed.
Chapter 5: Space Analysis Screen

Chapter 5 Part 1  Space Analysis Screen Conceptual Guide

The Space Survey screen is used for querying Location Information in the system. The results of the query can be graphically represented on an AutoCAD™ based drawing. The information can also be exported in a report format.

See Chapter 5, Part 2 for complete instructions and screen definitions.
Chapter 5, Part 2: Space Analysis Step By Step Guide

In the Space Management module, you can create custom queries on the Space Analysis screen to display information in the Space Viewer.

1. Select Space Analysis from the Space Management module.
2. Enter criteria for your query
   a. Use the “Group By” method to determine how the legend will be built for your query when the results are graphically displayed in the Space Viewer
   b. Use the boxes to the left of the column operators to determine which columns will display for the query and in which order they will display (NOTE: Location will always display as the first column).
3. To graphically view the data that was returned by the query in the Space Viewer, click on a Floor or Location link to open the CAD drawing.
   c. The drawing legend will be build based on the “Group By” method selected for the query.
   d. The drawing will be hatched based on the legend and data returned by the query.
4. You can use the standard Add/Save Query functionality to save your Space Analysis queries for later use.
The setup of this screen occurs only once. You may edit the information if the attributes change.

The CAD Layer Manager Setup screen gives you the ability to assign the layer names for locations and text. You can also set the default color for each layer.

The Floor Layer would contain a polyline that surrounds the entire floor to capture the gross square footage.

The Gross Layer gives you the ability to use a secondary polyline around each room to capture a "gross" area for that location. This layer could be used to capture mid-wall measurements, where other location layers capture inside wall measurements.

The Rentable, Usable, Assignable, and Non-Assignable Layers are used to identify each location and its corresponding space type. A room polyline would reside on only one of these four layers. For example, if a room could be classified as usable, it would reside on the Usable layer, even though it would also be classified as assignable. See the section on Space Types for more information.

The Location Info Layer is where AutoCAD labels would reside. These labels can contain information related to the location, employee, or equipment within the room. Instructions on how to create these labels can be found later in this document.

The Room Layer contains the room numbers linked with each Location in AiM™. The room number can be a Text or MText entity. If the room number is a block attribute, we have provided a macro to extract the attribute and place it on the Room Layer as an MText entity.

The Employee Layer will contain the name of each employee assigned to a particular location.
Serialized Equipment can be represented as blocks in your drawing when associated on the CAD Block Manager Setup Screen. The steps to do this are as follows:

1. You should have a block setup as a separate drawing file to be accessed when inserting the block into the drawing.

2. Enter the block name in the Block field. Because AutoCAD will create the block using the filename of the block drawing, the block name must be the same as the drawing name.

3. Type a description for the block in the Description field.

4. In the Layer field, type the name of the drawing layer you want the block to be located on. If this layer does not currently exist, the Init Drawing macro will create it. You may assign different blocks to the different layers, which can be useful to group different types of equipment, e.g. use a Fixed Assets layer and a Durable Equipment layer.

5. The default layer color should also be specified.

6. Insert the filename for the block in the Drawing Name field. This is the actual path/filename to the block drawing file, which should reside on a local hard drive or a network shared drive.

7. In the details section, enter the equipment group to associate to the block. You may enter multiple equipment groups for each block.
The Location Classification setup screen (Property → Property Profile → Edit → Select Location from Detail) allows you to define custom space types. The image below shows a sample setup for this screen.

- The Space Type field is one of the four standard space types listed above.
- The Location Type can be user defined to represent a custom space type. You may have multiple categories per type. This is the value used in the Location Type field on the Location screen.
• The Location Status identifies which category to use for a given type when the CAD to AiM™ macro creates a location or changes the space type based on the polyline layer in AutoCAD.

• The Hatch Color, Hatch Pattern, and Density fields specify default values to use when running a graphical space query where space type is the unique value.

Space types can be updated in two ways: The Space Type field on the Property Management screen can be changed to a new value. When the AiM™ to CAD macro is run, the corresponding polyline will be changed to the layer corresponding to the new space type. Second, the polyline layer can be changed to a different layer corresponding to another space type. When the CAD to AiM™ menu is run, the value in the Space Type field for that location is updated to the default value for the space type corresponding to the new polyline layer.
Appendix 1: Space Management

1A. Usage Screen

The Usage defines the primary institute functional categories. These include instructions, research, other sponsored activities, and other institutional actives. This screen is utilized to define these codes.

![Usage Screen](image)

The Usage denotes the desired code to be defined. The Description is a brief explanation of the usage code. The active pick box identifies whether or not the usage code is active and available for use with the system. Only active codes are displayed on the zoom select window.
1B. Program Screen

The Program code is utilized to define classification categories for tracking specialized uses. This screen is utilized to define these codes.

The Program field denotes the desired code to be defined. The Description is a brief explanation of the program code. The active pick box identifies whether or not the program code is active and available for use with the system. Only active codes are displayed on the zoom select window.

1C Occupant Type

The Occupant Type is utilized to define categories for tracking types of location occupants (space). This screen is utilized to define these codes.

The Occupant Type field denotes the desired code to be defined. The Description is a brief explanation of the occupant type code. The active pick box identifies whether or not the occupant type code is active and available for use with the system. Only active codes are displayed on the zoom select window.

1D Grant

The Grant code is utilized to for tracking institutional Grants. This screen is utilized to define these codes.

Title Block

The Grant field indicates the Institutional Grant Identification. The Description is a brief explanation of the Grant.

Status Block

The Start dated denotes the start of the research grant. The End date denotes the end of the research grant. These dates are optional. The amount field represents the total dollar amount of the grant. The Indirect Amount field denotes the maximum recovery amount. This amount indicates the funds that can be recovered from the Grant to support grant activities.
1E Principal Investigator

The Principle Investigator is utilized to track grant administrators. This screen is utilized to define these individuals.

Title Block

The Principal Investigator field denotes the principal investigators’ identification. The Description is a brief explanation of the principal investigator.

Status Block

The active pick box identifies whether or not the principle investigator is active and available for use with the system. Only active codes are displayed on the zoom select window. The Employee Id field associates a Human Resource Module Employee to the principle investigator.

Status Screen

The Grants screen is utilized to associate defined grants to a principle investigator. The principle investigator is the primary contact person responsible for managing grant actives.

The Grant field indicates the grant identification. The Description is a brief explanation of the grant. The start date denotes the start of the grant. The end date indicates the end of grant activities. The Amount field represents the total grant amount.
Title Block

The Space Survey transaction number is what uniquely identifies a Space Survey record. The format of this number is setup in the system administration module. The description represents an overall explanation of the Space Survey, describing the type of survey that needs to be completed.

Active Block

The Active block indicates whether or not the Space Survey template is active and available for use in the system. The active block also identifies if the Space Survey template type; Property, Organization, Principle Investigator. Property denotes the survey organized by Property. Organization indicates the survey organized by Organizational Occupancy. The Principle Investigator denotes organized by Principle Investigator. If so the project number is identified and then included on the PM work order when generated. A "projection end date" field is provided to set the end date when projecting the schedule of the template upon saving the record.

Generation Method field indicates the frequency of survey generation.

- Fixed: A survey will generate one frequency period after the previous survey has been generated.
- Time: A survey will generate one frequency period after the previous survey has been completed (The survey must of reached a status of “APPROVED”). At that point the system updates the Last Survey Date and a new survey will generate, one frequency period later.
- Calendar: A survey will generate on each fixed date entered in the scheduling calendar. When this type is selected The Calendar Dates option on the view select menu becomes available for population.

Frequency: this screen is used to enter the frequency of survey (in occurrences a year).

A "projection end date" field is provided to set the end date when projecting the schedule of the template upon saving the record.

Property Block

The property block identifies the place where the survey is to be performed within the property hierarchy. A brief description of the property is also shown. The Email field indicates an electronic mail address where a notification can be sent. This notification informs the recipient that a survey is ready to be completed. The Send Email field indicates if this functionality is utilized a specific property. The Last Date field denotes the date of the previous survey.
**View / Select: Seasonality**  
The seasonality screen is used to limit the generation of surveys created from a template to only the period of time each year specified on this screen.

**View / Select: Related Documents**  
The related documents function allows you to attach any electronic record, such as a document, spreadsheet, or image from the document repository to the record on which you are working. Related documents could also be a URL (web) shortcut.

**1G Space Survey Generator**

The Space Survey Generator screen is used to Generate Space Surveys from the Space Survey template

**Title Block**  
The title block identifies the unique pm generator id and an optional description.

**Finalized Block**  
The finalized field is initially set to no until the space survey is actually run. (To run the Space Survey Generator click on the Gears in the upper left hand corner) Upon successful completion the finalized field automatically updates to yes. This field cannot be edited by the user. The end date is how far into the future the Space Survey generator will produce surveys.

**Property Block**  
Filter by Property, the filter can be set to filter by one or by any available combination of the following; region, facility, or property. The property is dependent on the facility, and the facility is dependent on the region.

**Organization Block**  
Filter by Organization, the filter can be set to filter by one or by any available combination of the following; Institution, Department, or Organization. The Organization is dependent on the Department, and the Department is dependent on the Institution.

**Principle Investigator Block**  
Filter by Principle Investigator, the filter can be set to filter by selecting a Principle Investigator.
Template Block
Filter by Template, the filter can be set to filter by selecting a Template.

1H CAD Block Manager

The CAD Block Manager connects defined Equipment groups to a CAD drawing.

<table>
<thead>
<tr>
<th>CAD Equipment Block Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Block</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>AIR MANAGER</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Layer</th>
<th>Layer Color</th>
<th>Drawing Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>FAMILIAR</td>
<td>#5F0000</td>
<td>C:</td>
</tr>
</tbody>
</table>

Serialized Equipment can be represented as blocks in your drawing when associated on the CAD Block Manager Setup Screen. The steps to do this are as follows:

1. You should have a block setup as a separate drawing file to be accessed when inserting the block into the drawing.
2. Enter the block name in the Block field. Because AutoCAD will create the block using the filename of the block drawing, **the block name must be the same as the drawing name**
3. Type a description for the block in the Description field.
4. In the Layer field, type the name of the drawing layer you want the block to be located on. If this layer does not currently exist, the Init Drawing macro will create it. You may assign different blocks to the different layers, which can be useful to group different types of equipment, e.g. use a Fixed Assets layer and a Durable Equipment layer.
5. The default layer color should also be specified.
6. Insert the filename for the block in the Drawing Name field. This is the actual path/filename to the block drawing file, which should reside on a local hard drive or a network shared drive.
7. In the details section, enter the equipment group to associate to the block. You may enter multiple equipment groups for each block.
1J CAD Layer Manager

The CAD Layer Manager Setup screen gives you the ability to assign the layer names for locations and text. You can also set the default color for each layer.

The Floor Layer would contain a polyline that surrounds the entire floor to capture the gross square footage.

The Gross Layer gives you the ability to use a secondary polyline around each room to capture a “gross” area for that location. This layer could be used to capture mid-wall measurements, where other location layers capture inside wall measurements.

The Rentable, Usable, Assignable, and Non-Assignable Layers are used to identify each location and its corresponding space type. A room polyline would reside on only one of these four layers. For example, if a room could be classified as usable, it would reside on the Usable layer, even though it would also be classified as assignable. See the section on Space Types for more information.

The Location Info Layer is where AutoCAD labels would reside. These labels can contain information related to the location, employee, or equipment within the room. Instructions on how to create these labels can be found later in this document.

The Room Layer contains the room numbers linked with each Location in AiM™. The room number can be a Text or MText entity. If the room number is a block attribute, we have provided a macro to extract the attribute and place it on the Room Layer as an MText entity.

The Employee Layer will contain the name of each employee assigned to a particular location.
Below is an example of a space type hierarchy. Institutions often have different standards based on their needs. You may assign space types to locations according to your standards, or have all polylines default to one type.

![Space Type Hierarchy Diagram]

The default layer standards represent logic similar to that in the chart above.

**Floor:** The entire envelope of the floor.

**Gross:** Mid-wall measurements of each location, typically summing up to the floor gross area.

**Rentable:** Locations that are rented by an organization, including service and common areas.

**Usable:** Locations that are used by a specific organization.

**Assignable:** Locations that can be assigned to an individual.

**Non-Assignable:** Location that is maintained but not rentable.

While usable locations are also considered rentable locations in the hierarchy, only locations that are rentable but not usable would have polylines on the designated rentable layer in AutoCAD. For example, a conference room polyline would be on the Usable layer and a corridor polyline on the Rentable layer. The conference room square footage, however, would be included in both the Total Usable and Total Rentable summary fields. The Rentable - Usable field represents the sum of the rentable polylines, so the conference room square footage would be deducted from this total. The same relationship applies to usable and assignable square footage.
Appendix 2: AutoCAD™

2A Configuration Steps in AutoCAD

The following information is a guide to setting up AutoCAD to communicate with AiM™. You will connect the two applications together using a data source. You will need to connect to the data source each time you open AutoCAD to connect to AiM™.

Connect to the Data Source

1. Open the dbConnect Manager (Tools→dbConnect). The AiM™ data source icon will contain a red "x" until you connect to the database.

2. Right-click the AiM™ data source icon and select Connect from the menu window.

3. Enter your Login ID and Password and click OK.

4. When the connection is complete, the list of databases available under the AiM™ data source will appear in the data source window.
2B Creating a Label Template

Label templates give you the ability to add database information to the drawing. Room polylines, equipment blocks, and employee text can all have templates applied to them. Labels are created based on the link templates used by AutoCAD’s dbConnect Manager.

1. To create a label template, open the dbConnect Manager (Tools → dbConnect).

2. Select a link template on which you will base your label. (Link templates are created by the Initialize Drawing Macro)
   
   AE_R_EQM_ELink1               Serialized Equipment Information
   AE_H_EMPLOCATIONLink1         Secondary Employee Locations
   AE_H_EMP_ELink1               Employee Information
   AE_B_LOC_DLink1               Location Information

3. Click the New Label Template icon.

4. Enter a name for the label template, or just accept the default and click Continue.
5. The Label Template Editor will appear. For each database field you wish to display in the label, select it from the Field drop-down menu and click **Add**. You may also add your own text to the label template.

6. The **Character** and **Properties** tabs also allow you to format the label font, size, color, style, and more.

7. When finished, click **OK**.
8. The Label Template will now appear in the dbConnect Manager
## 2C AiM™ Space Macros

### AiM™ Space Toolbar Buttons

The macros may be accessed and initiated in one step by clicking on an icon placed on the AutoCAD menu bar. The icons and actions are listed below in the table.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AiM™ to CAD</td>
<td>Associates AiM™ employee data or equipment data to an AutoCAD drawing and updates the drawing with the latest AiM™ data.</td>
</tr>
<tr>
<td>CAD to AiM™</td>
<td>This macro will calculate square feet and transfer this data to the property record, along with the room number. The information will populate the Location listing at the bottom of the property record on the screen. The square feet data will also appear in the Floor(s) screen and More screen on this record.</td>
</tr>
<tr>
<td>Edit Location</td>
<td>This macro will edit one selected location, updating location information such as organization. It also can be used to renumber the location.</td>
</tr>
<tr>
<td>Reload Labels</td>
<td>This macro will refresh and show/hide any data labels on the drawing.</td>
</tr>
<tr>
<td>AiM™ Setup</td>
<td>This opens up the AiM™ Space Setup window, which allows configuration of database connection parameters for the AiM™ database.</td>
</tr>
<tr>
<td>Initialize Drawing</td>
<td>This macro must be run first. This macro sets up the template files for all the layers in AutoCAD where AiM™ data will be stored. This macro may be run after the AiM™ SPACE Setup screen has been completed and saved.</td>
</tr>
<tr>
<td>Auto Polyline</td>
<td>The Auto Polyline macro looks for Room text in the ROOM layer inside a closed polyline and then surrounds this text with a polyline in the USABLE LOCATION layer on the AutoCAD Drawing. This macro saves time you would otherwise use to create the location polylines manually.</td>
</tr>
<tr>
<td>Extract Attributes to MText</td>
<td>This function extracts text from block attributes and writes it as MText on the designated ROOM layer. Designed to allow easy extraction of room numbers.</td>
</tr>
<tr>
<td>Drawing Checker</td>
<td>This macro checks for possible errors with polylines and room numbers.</td>
</tr>
<tr>
<td>Clear Floor Data</td>
<td>Clears Floor and Location data links from the AiM™ database.</td>
</tr>
<tr>
<td>Launch Property</td>
<td>The macro will retrieve the property record associated to the drawing for reference.</td>
</tr>
<tr>
<td>Launch Work Request</td>
<td>The macro will retrieve all the work request records associated to the drawing for reference. (Acts like a FIND command.)</td>
</tr>
<tr>
<td>Launch Employee</td>
<td>From an AutoCAD drawing, click on the name of an employee. The macro will retrieve the employee’s record in AiM™ for reference.</td>
</tr>
<tr>
<td>Launch Equipment</td>
<td>From an AutoCAD drawing, click on the equipment block. The macro will retrieve the equipment record in AiM™ for reference.</td>
</tr>
<tr>
<td>Launch Lease</td>
<td>From an AutoCAD drawing, click on the macro button in the AiM™ Space toolbar. The macro will retrieve the lease record in the AiM™ Lease Management module.</td>
</tr>
</tbody>
</table>
**2D Space Database Connection Setup**

This screen allows you to set the connection parameter for your AiM™ database.

The Database section requires a valid Database, Login/Password, and Server for the AiM™ database.

The AiM™ section requires a valid Login/Password for the AiM™ application, as well as the URL for the AiM™ Server.

The AiM™ Space section allows setting up/enabling various AutoCAD logs, and requires a valid Install Directory where the AiM™ Space program resides.
**2E AutoCAD™ Menu Macros**

**Initialize Drawing Macro**

Now that you have set up the AutoCAD menu and configured the AiM™ Space Setup and Block screens, the next step is to create the layers for Location, Employee and Blocks. The Initialize Drawing macro will create these layers and the Link Templates for the association of location polylines, room text, employees, and blocks.

To run the macro, click on the Initialize Drawing toolbar icon or select **Initialize Drawing** from the AiM™ menu.

Any link templates or layers that are created will be recorded in the log files and displayed on the command line. At the completion of the process, the following message will appear:

![FMax Initialize Drawing dialog box]

The dbConnect window will list the link templates below the drawing filename.

![dbConnect window with link templates]

The default template names reference the AiM™ tables where the data is stored:

- **AE_R_EQM_ELink1**  
  Serialized Equipment Information
- **AE_H_EMP_LOCATIONLink1**  
  Secondary Employee Locations
- **AE_H_EMP_ELink1**  
  Employee Information
- **AE_B_LOC_DLink1**  
  Location Information
Auto Polyline Macro

The AutoPolyline macro looks for text in the ROOM layer inside a closed boundary, then surrounds this text with a polyline in the Location Usable Layer on the AutoCAD Drawing. This macro saves time you would otherwise use to create the location polylines manually.

Before running the macro, turn off any unnecessary layers so that only the layers with walls and other boundary lines are on. The room number and the polyline layers should also be turned on.

To run the macro, click on the Auto Polyline toolbar icon or select Auto Polyline from the AiM™ menu.

When the macro is done, the following window will appear.

You can move the polylines from the Location Usable Layer to the Rentable,Assignable or Non-Assignable layers to identify the space type of the room, if desired.
CAD to AiM™ Macro

This macro associates an AutoCAD drawing to a AiM™ record and transfers the polyline square footage to the location tables. This macro will be run whenever a change is made to the drawing so that the AiM™ records can be updated to reflect the change.

To run the macro, click on the CAD to AiM™ toolbar icon or select CAD to AiM™ from the AiM™ menu.

The first time you run the macro for a drawing, the Floor to Drawing Link window will appear. Enter the Region, Facility, Property and Floor of the AiM™ property record you wish to link. The drawing path will be stored in the CAD Drawing field on the Floor window of the Property Information screen.

Next the CAD to AiM™ Menu will appear. You can deselect any data element(s) you do not wish to update. Poly Sqft cannot be deselected because location information must be checked and updated every time.

CAD to AiM™ will link the room numbers and polylines to the location records contained on the Property Information screen for that building and floor. If the location does not currently exist, it will be added via the macro. The space type will also be updated for each location based upon the polyline’s layer. The square footage of each location will then be calculated and summed for the floor and building.
It is important that the room number on the drawing matches the room number on the Property Information screen. If it does not, an unwanted location could be created using the room number from the drawing.
When the macro is finished, the following screen appears:

Look at the record in AiM™ to view the results of the macro processing.

The CAD to AiM™ macro will be used to update the AiM™ records for equipment and employee changes, as well.

If you drag and drop an employee’s text name from one room on a drawing to another, run the CAD to AiM™ macro to change the room number on the employee record in the Human Resources module.

Likewise, if you move a piece of equipment or simply delete it from the drawing, run the CAD to AiM™ macro to update the equipment record in the Inventory and Equipment module.

See the discussion below entitled Making Changes to the Drawings or the AiM™ Records.
**AiM™ to CAD Macro**

This macro will add any employees and/or equipment assigned to a location on the drawing. Additionally, if a location’s space type is changed, the polyline will be moved to the corresponding layer. If a room is inactivated in AiM™, the corresponding polyline will be removed from the drawing.

To run the macro, click on the AiM™ to CAD toolbar icon or select AiM™ to CAD from the AiM™ menu.

1. **Associate Employee Record Data**

Use AiM™ to CAD to associate an employee in a AiM™ human resources record to the AutoCAD drawing. See Set Up the Employee Record in AiM™ earlier in this document. Run this macro whenever employee data changes to update the AutoCAD drawing with the new information. An MText object of the employee’s name will be created on the designated Employee layer and placed in the center of the polyline for the location the employee is assigned. Secondary locations will show the employee’s name followed by (2ND).
2. Associate Equipment Record Data

The AiM™ to CAD macro is also run to associate a piece of equipment to the Equipment layer of the AutoCAD drawing. Run this macro whenever you change the information in the AiM™ record, so that the AutoCAD drawing will be updated. A block object of the serialized piece of equipment will be created and on the Equipment layer of the AutoCAD drawing and placed in the center of the polyline for the location entered for that piece of equipment in the AiM™ Serialized Inventory Master record.

Note: The serialized piece of equipment must already exist and its Equipment Group must have been associated with an AutoCAD block in the Block Setup screen of the AiM™ SPACE module. See Set up an Equipment Record in AiM™ and Block Setup Screen for the EQUIPMENT Layer earlier in this document.

This drawing shows the chiller assigned to Room 102 from the previous setup examples.

When the macro has finished, the following screen will appear:
Edit Location Macro

This macro allows you to edit attributes for a specified Location on the drawing. Once the desired changes are made, click OK to update the AiM™ database to reflect these changes.
Launch the Property Information Screen

This macro accesses the AiM™ Property Management module records that have been associated with the drawing open on the AutoCAD screen.

To run the macro, click on the Launch Property toolbar icon or select Launch Property from the AiM™ menu. Click on either the polyline or room number for the location to view.

The macro launches the AiM™ Property Information screen showing the selected floor and location.

Launch the Work Request Screen

This macro accesses the AiM™ Work Management module records that have been associated with the drawing open on the AutoCAD screen.

To run the macro, click on the AiM™ to CAD toolbar icon or select Launch Work Request from the AiM™ menu. Click on either the polyline or room number for the location to view.

The macro launches the AiM™ Work Order Screen and loads the associated work order record(s). It is common to have several work requests in various stages of work, from OPEN to CLOSED. The macro functions like a FIND command based on the Region, Facility, Property, Location hierarchy and it will load all the work requests it finds.

Launch the Employee Data Screen

This macro accesses the AiM™ Human Resources module records that have been associated with the drawing open on the AutoCAD screen.

To run the macro, click on the Launch Employee toolbar icon or select Launch Employee from the AiM™ menu. Click on either the polyline, room number or employee name for the employee to view.

The macro launches the AiM™ Human Resource Module and loads the associated employee record. If a polyline or room number is selected, all employees within that room will be shown. If you click on the employee name, only that employee’s record will be retrieved.

Launch the Equipment Profile Screen

This macro accesses the AiM™ Asset module records that have been associated with the drawing open on the AutoCAD screen.

To run the macro, click on the Launch Equipment toolbar icon or select Launch Equipment from the AiM™ menu. Click on either the polyline, room number, or equipment block for the location to view.

The macro launches the AiM™ Equipment Profile Screen and loads the associated serialized equipment record. If a polyline or room number is selected, all equipment within that room will be shown. If you click on the equipment block, only that equipment record will be retrieved.
Launch the Lease Management Screen

This macro accesses the AiM™ Lease Management module records that have been associated with the drawing open on the AutoCAD screen.

To run the macro, click on the Launch Lease toolbar icon or select Launch Lease from the AiM™ menu. Click either the polyline or room number for the location to view.

The macro launches the AiM™ Lease Management Screen and loads any associated lease record.

Extract Attribute Macro

This macro extracts text from a block attribute and creates an MText object on the ROOM layer.

To run the macro, click on the Extract Attribute toolbar icon or select Extract Attributes to MText from the AiM™ menu.

1. Enter the block name at the prompt

   ![AutoCAD dialog box for entering block name]

2. Enter the attribute name at the prompt

   ![AutoCAD dialog box for entering attribute name]

3. The text contained in the attribute will be extracted from each block in the drawing and an MText object will be created on the ROOM layer just below the block text
Drawing Checker Macro

This macro checks the room numbers on the ROOM layer for duplicate values room numbers without polylines around them. It will also check for polylines with multiple room numbers within the boundary, polylines without room numbers, and polylines outside the floor gross polyline.

To run the macro, click on the Drawing Checker toolbar icon or select Drawing Checker from the AiM™ menu.

If any duplicate room numbers are found, they will be displayed when the macro has finished running. The numbers are also written to the auto polyline log file. You can zoom to each room number using the Find command under the Edit menu.

Otherwise you will be informed that there are no duplicates.
Reload Labels Macro

Use the Reload Labels macro to turn labels on or off and refresh the labels with the most current database information. The labels are automatically refreshed when running AiM™ to CAD.

To run the macro, click on the Reload Labels toolbar icon or select Reload Labels from the AiM™ menu.

All labels will be reloaded and those selected will be displayed on the drawing.
Clear Floor Data Macro

Use the Clear Floor Data macro to clear all the existing drawing links to the Floor/Locations. (NOTE: This is highly recommended if you are using existing FacilityFocus™ drawings that you are trying to re-link to an AiM™ database).

To run the macro, click on the Reload Labels toolbar icon or select **Clear Floor Data** from the AiM™ menu.

All links that the drawing has to the Floor and Location tables will be cleared.
**2F Making Changes to Drawings or to AiM™ Records**

Over time, the database elements - employees, room numbers, furniture/equipment, leases, work requests and the property record itself - will change for various reasons. Some of the changes may occur first in either AutoCAD or in AiM™. Depending on where the change is first made, you will either run the CAD to AiM™ macro or the AiM™ to CAD macro to update the information.

**Move Employee or Move Equipment - Same Drawing**

You wish to move an employee from Room 104 to Room 101, the window office facing south on the same floor. You wish to move the copier along with that person. This may be done easily in either AutoCAD or in the AiM™ record.

**AutoCAD Procedure**

1. Select the employee name or the equipment block and drag it to the new location on the floor.

2. Run the CAD to AiM™ macro to update the AiM™ record.

3. In AiM™, the employee record and the equipment record should now be updated. If not, refresh your screen by re-finding the record.

You may review the history of all moves in the employee record and/or equipment record by clicking on the Relocation button.

**AiM™ Procedure**

1. In the employee record or the serialized equipment record, update the room number. Save the record.

2. In AutoCAD, run the AiM™ to CAD macro.

3. Click OK when the completion box appears on the screen.

The text that represents the employee and the block that represents the piece of equipment will relocate on the drawing to the new rooms.

**Move Employee or Move Equipment - New Drawing**

You wish to relocate an employee from the first floor to the second (or from Building A to Building B), and you wish to move the copier along with that employee. This type of relocation must first take place in AutoCAD.

1. Delete the Text name of the employee and delete the block that represents the piece of serialized equipment.

2. Run the CAD to AiM™ macro to update the AiM™ records.

3. Save the drawing and close it.
In AiM™, the Region-Facility-Property-Location information will be blank. If this is not the case, refresh the screen by re-finding the record.

4. In the AiM™ record, in update mode, enters the updated Region-Facility-Property-Location information. The equipment record status will be changed to Location Unknown, be sure to change it back to an In Use status.

5. Save the records.

6. Return to AutoCAD and open the new drawing to where the employee and the equipment are being relocated.

7. Run the AiM™ to CAD macro . The employee text and the equipment block will appear on the drawing.

8. Save the drawing.

The move history of both the employee and the serialized equipment may be viewed by clicking the Relocation button on either the employee record or the serialized equipment record in AiM™.

**Splitting a Room**

Example: You wish to split Room 101 into two rooms named 101A and 101B.

1. In AutoCAD, select the polyline in the LOCATION Layer that surrounds room 101 and delete it.

2. Select the Room Text in the ROOM layer that reads 101 and delete it.

3. Create the new Room Text in the ROOM layer for room 101A and 101B.

   **NOTE:** Do not copy or modify existing text used for the old undivided room. Doing this will cause two different rows in the AiM™ location table to be linked to the text object. Delete the old text as instructed in Step 2 above.

4. Add a line that will represent the dividing wall.

5. Run the Auto Polyline Macro or manually create the new polylines in the LOCATION layer.

6. Run CAD to AiM™ Macro .

   This macro will change the location status of room 101 to INACTIVE in the AiM™ property record location detail, and it will create two new locations, 101A and 101B. It will also set the object handle to null for 101 and to the new object handles for 101A 101B. Location History will also be updated.

**Changing a Location status in AiM™**

1. In the AiM™ property record location detail, update a location status to INACTIVE.

2. Save the record.

3. In AutoCAD, open the associated floor drawing and run the AiM™ to CAD macro .
The macro will delete the polyline in the LOCATION layer of the AutoCAD drawing that is associated to the INACTIVE location in the AiM™ property record. If you run the AutoPolyline macro, the polyline will be recreated. If you then run the CAD to AiM™ macro, the location will be added back to the property record as an active location and the location status history will be updated to reflect this change.
2H CAD Viewer

Now that AiM™ Space has been configured, you can open any record - property, employee, work order, lease or equipment - that has been associated with an AutoCAD drawing and activate the CAD Viewer to view it.

Click Property – Property Profile – Location and then click on CAD Viewer button.

The CAD Viewer Screen will open with the associated AutoCAD image of the floor with the location of the record item hatched.

Clicking on a particular location in the detail section of the property screen and then launching the CAD Viewer will select only that location.