



Evolve FM CAFM Software Platforms



Evolve FM is a low cost, easy-to-use State of the art Computer Aided Facility Management (CAFM) solution that provides the ability to efficiently manage an organization's Space, Asset, Maintenance, and Occupant Activity data. It is built using the latest technologies, browser based, and utilizing industry standard products Microsoft IIS Server and Microsoft SQL Server.

Cloud Deployment or Self-Hosted Deployment

Evolve Cloud deployment is hosted on Microsoft Azure (included with software cost), or a cloud service provider of your choice (additional cost may apply). Software upgrades are performed by the cloud service provider. Self-hosted deployment is also available. Software upgrades are the responsibility of your IT department.

3 Software Platforms

There are three Evolve FM software platforms available, Ultimate, PRO, and Essentials. Each platform consists of Evolve FM functional modules & accessory components. The platform you choose will depend upon which modules & accessories are important to you.

The Ultimate & Pro software platform pricing below includes 1 concurrent User license, Essentials includes 1 Named User license.

EVOLVE FM MODULES & ACCESSORIES	ULTIMATE	PRO	ESSENTIALS
Space & Assets Management	✓	✓	✓
Operations & Maintenance Management	✓	*see note	limited**
Moves Module	✓	*see note	
Space Scheduler	✓	*see note	
Drawing Composer Module	✓	✓	✓
Plan Room Module	✓		
Dashboards	✓	✓	✓
Location Finder Services	✓	✓	✓
FM Power Tools	✓	✓	
Space Groups	✓	✓	✓
Allocation Breakdown	✓		
Requester	✓	✓	
Work Order Scheduling Calendar	✓		
Unlimited Read Only Users	✓	✓	

* Your choice of 1 of 3 modules to go with the PRO platform

** Work Order Maintenance functionality only

Additional User Licenses

There are three User License types, a Concurrent License where you only purchase the number of licenses equal to the largest number of users likely to be active on the system at a given time, a Named User License where you purchase 1 license for each Named User in Evolve, and an Unlimited Viewer license which provides read-only access to find people, assets, & spaces.

User License Types	ULTIMATE	PRO	ESSENTIALS
Concurrent User License	✓	✓	
Named User License			✓
Unlimited Viewer License	Included (no charge)	Included (no charge)	Not available

All pricing is in US dollars.



Single Sign On (SSO) & Automatic HR/Data Feed

Single Sign On and Data Broker can be added to the ULTIMATE or PRO platforms if needed.

ITEM	ADD TO:
Single Sign On	ULTIMATE or PRO
Data Broker (HR/Data Feed)	ULTIMATE or PRO

Evolve FM Module Descriptions



Space & Asset Management Module

The Space & Asset management modules includes the following components:

Drawings

Drawings is the most used component in Evolve FM. It lets you query, view and edit information about spaces, assets and occupants graphically.

There are functions to help you find occupants, assets, spaces and drawings across your whole space portfolio.

You can perform click and drop moves to relocate occupants or assets into new spaces.

You can select a space and create Move In, Move Out, and Service Requests, as well as Work Orders.

Themes lets you highlight spaces in a variety of ways to convey information about departments, cost centers and occupancy. And, you can turn the highlighted drawing and legend into a report at the push of a button.

Layers lets you view your floor plan the way it was created in AutoCAD or Revit.

Plan Views provides your users one click access to floor plan related information like Emergency Egress routes and asset locations

You can create a variety of space labels to display information on drawings about occupancy, space classification and special use.

Drawings is the “go to” module in Evolve for most casual users. It lets them easily find and share the information they need.

Properties, Buildings, & Floors

In Evolve FM, an organization may contain many Properties/Campuses. On those Properties/Campuses, there may be many Buildings; Buildings may contain many Floors.

Space

Space provides a comprehensive set of functions to compile and manage your facility spaces. In Evolve you can group your spaces in up to 3 separate tiers; Category, Class and Sub Class. And, you can assign unique User Defined Attributes at any tier level to keep track of features these spaces might have.

You can use QR codes or bar codes to identify spaces using a phone or tablet.



Evolve Space lets you multiselect spaces for group editing when data needs to be changed. Space information can also be brought into the Evolve database via the drawing import function or from spreadsheets.

You can manage your spaces in either the drawing module or the space module depending on what you're trying to do. Often, having the drawing available for reference is very useful.

Evolve's data grids and powerful filtering tools let you view and report your space information the way YOU need to see it. Evolve's grid views are personalized for each user for maximum utility.

Finally, it's easy to import and export space information from and to MS Excel when it makes sense.

Contacts

In Evolve, Contacts is where you keep information about everyone who has anything to do with your facilities operations. This includes:

- Occupants
- Individual Contractors
- Companies
- Vendors
- Service Providers

Anyone who's going to occupy a space in Evolve will get added to the Occupant list.

You can select people/companies from the contact list to assign to tasks in a work order for example. Also, vendors that you buy equipment and services from... contacts is a container for a broad range of contact information about people you may need to call or email.

Occupants

Anyone who is going to occupy a space in your facilities should be part of the occupant's list.

The occupant record shows all the attributes, contact information, and space/asset assignments the occupant has.

Assets

Assets provides a comprehensive set of functions to compile and manage your facility assets. In Evolve you can group your assets in up to 3 separate tiers; Category, Class and Sub Class. And, you can assign unique User Defined Attributes at any tier level to keep track of features these assets might have.

Assets, like occupants, can be assigned to spaces and/or to occupants.

You can use QR codes or bar codes to identify assets using a phone or tablet.

Evolve Assets lets you multiselect assets for group editing when data needs to be changed. Also, when adding a lot of assets of the same type (like fire extinguishers) Evolve has tools that help you create multiple asset records at the same time, saving lots of time and effort.

Evolve's data grids and powerful filtering tools let you view and report your asset information the way YOU need to see it. Evolve's grid views are personalized for each user for maximum utility.

Finally, it's easy to import and export asset information from and to MS Excel when it makes sense.

Pictures

Evolve FM allows you to add pictures to asset and space records. Since pictures can be reused many times over (particularly with assets like fire extinguishers and computers) in a database, we allow you create a picture library and then access and add pictures to asset and space records as needed.



Documents

Attaching documents to Evolve database records is extremely useful. Facilities people need access to equipment operating guides, regulations, lease documents and a host of other information to do their work.

Evolve's Documents archive lets you upload all the documents you need and then associate those documents with database records in Evolve. This allows everyone to easily access all the information they need in one place and on any device.

Reporting

Reporting is another of the core components of Evolve FM. It provides a small number of standard reports that you can configure to filter and organize the data you need for your report.

Once you've configured a report that you know you're going to run repeatedly, you can ask Evolve to "remember" that report so running it the next time is a one click action. When you want to run a report, you can either run it live or "publish" it in background (this is useful for large reports that include drawings and might take a long time to run); Evolve will notify you when the report is published so you can open it.

Evolve Reporting also includes a function called dynamic spreadsheets. Dynamic Spreadsheets lets you access virtually all the data fields in Evolve and configure your own "on the fly" report containing the information YOU need.

And, since Evolve FM is a SQL database application, it's possible for anyone with SQL reporting creation skills to build custom reports. Those reports can be added to the available reports list for anyone to use.

Platform Administration

This is where you configure Evolve to reflect how you want to use it to manage your facilities information.

Evolve is a very configurable software application, which means you can make it behave pretty much how you want it to. At the same time, it takes some reading and/or working with a knowledgeable Evolve consultant to set it up optimally to meet your objectives.

Understand that you can always use Evolve "as is" right out of the box and reconfigure it a little at a time based on the collective user experience.

Platform Admin is a core component of Evolve FM.

Operations & Maintenance Module

Maintenance is a set of robust CMMS functions built right into Evolve FM. You can submit work requests, create work orders, apply preventive maintenance routines and drive all kinds of work-related activities with the maintenance module.

The Maintenance module manages both demand and preventive maintenance and provides capabilities for managing communications with all parties during the work order lifecycle.

As with all Evolve FM modules, what an individual user can see and act upon is determined by the login permissions you give them.

Work Order Assignment Calendar - Shows all work orders and the days/times they are assigned on a live calendar where they can be opened to change information, dragged around to different days and times to make on the fly adjustments to workloads.



Move Module

The Evolve FM Move module is a comprehensive set of tools for planning and executing larger project-based moves. The Evolve FM Move module provides a high degree of flexibility in order to work easily with your current processes.

Move Requests let you define specifics for each occupant you are moving.

Move Projects let you gather the occupants involved in a particular move into a container where they can be sequenced, scheduled, and moved.

Move Planner is like a digital whiteboard where you can drop occupants on spaces in “what if” scenarios with all manner of color highlights to communicate planned actions.

All this from a browser on any device connected to the internet.

Powerful, easy to use, and very efficient.

SPACE SCHEDULER AND HOTELING

Space Scheduler takes the idea of Space Groups to a higher level.

Your employees want an easy way to find an available space and book it. Evolve Room Scheduling is a simple, powerful application for managing all the who, what, where and when details that go with booking a space.

Evolve Space Scheduling provides easy to select controls to let you view your scheduling information the way you want to.... Spaces are color coded in both the calendar and drawing views so it's easy to see what's booked, available and requested...

Most users just want to find an available space and book it for the period they need.... The calendar view makes this process easy and intuitive.

Evolve space scheduling provides intuitive dialogs for locating and booking a space when you need one... you can easily see who's booked a space and when.... And our space location viewer offers one click access to display where a space you might want to book is.

Finally, Evolve Space Scheduling also keeps a full history of who was in what space on what day.

Drawing Composer Module

Evolve Drawing Composer does some really important and cool things.

Many facilities people want the advantages a CAFM system offers but do not have CAFM ready floor plan drawings. Now, if you have gifs, jpgs, literally any kind of digital picture of your floor plans, you can use composer to make them useful as CAFM drawings. Composer provides a set of tools to let you create “spaces” on the floor plan image and link them to space records in the database. These spaces can be highlighted, themed and managed just like CAD generated spaces.

This is a big deal.

You can also create icons that represent assets that you want to show on your floor plans. Then you can drop those icons on your plans at the location of the asset and link the icon to the asset database record.



These assets can be displayed on the plans and toggled on and off depending on what the viewer wants to see. This is a great tool set for IT people who want to keep track of jacks, connectors and any number of other IT type assets.

We've had one organization interested in visually tracking art work locations on their plans... Composer lets you do that in a very slick way.

Even if you have a full set of usable CAD drawings to create your Evolve FM floor plans, you will still want Composer to visually manage your assets.

Plan Room Module

Plan Room is a document management and distribution module for Evolve FM. It differs from Documents in that you can add attributes to the document database record to group, sort, and share documents according to who needs them for what and for how long.

Documents can be assigned to projects, categorized, be part of an approval process, and otherwise filtered to control them in the context of project management.

Plan Room is intended to be used by facilities groups managing projects and dealing with outside contractors, architects and other service providers. It provides a vehicle for managing what documents get shared with what people and for how long.

And, access can be terminated easily when the project wraps up.

ACCESSORIES & ADD ON DESCRIPTIONS

Evolve FM[®]

Dashboards

Dashboards are your personal access window into Evolve FM. Configure your dashboard to reflect what you do with Evolve... what modules you access, what reports you run, what data you need to see.

Your Dashboard will make you more efficient and improve your Evolve FM user experience.

Data Broker

Data Broker provides automated transfers and updates of HR data between Evolve FM and your company's HR system.

Data Broker is an admin level module that lets the user set up a rules-based import and/or export of HR related information between the Evolve FM database and your HR system of record.

NOTE: Data Broker can be customized to work with other systems of record if there is a need for an automated approach to exchanging space, asset or move related data with another system of record. If this is of interest, we're happy to review your requirements and provide a cost proposal for implementation.



Location Finder Services

Our Location Finder Services provide an elegant, easy way for anyone in your organization to locate an occupant, space, or asset. You can access Finder from the Evolve FM menu, your dashboard, or from your corporate web site or intranet (if you've connected it there).

Your search will display both details about what you've searched for as well as a drawing with the appropriate space(s) highlighted.

Location Services also includes **Location Viewer**, which puts a widget on most Evolve data forms that opens the appropriate floor plan so you can see where something is no matter what you are doing.

Locating your people, places and things has never been easier.

- One user license services unlimited Finder Users
- Finder can be accessed from the Evolve Menu, your Dashboard or from a web page on your web site
- Location Services makes all the Finder widgets available for use in Dashboards

FM Power Tools

FM Power Tools provides some additional features that some users will find important.

Dynamic UDAs - User defined attributes are an important feature of Evolve in that they let you track information that's not part of the core database structure. Dynamic UDAs go a step further by letting you assign them any category, class or subclass within spaces and assets. This allows you (for example) to assign unique UDAs to Air Handlers and unique UDAs to Fire Extinguishers and search and sort on them as needed.

QR Code Scanning - QR codes are more and more the standard way of identifying spaces and assets in your organization. In the facilities world, being able to scan and identify spaces and assets with your phone or mobile device as you survey your facility will be more and more the expectation.

API Access - Evolve has a documented API that partners and even end users can access to add unique functionality. On request we can provide the appropriate documentation and answer any questions relating to use cases a partner or end user may have.

Services – Ever wonder what spaces and assets were serviced by a specific router? Or what spaces a particular air handler serviced? The Evolve Services component lets you define an asset's relationship with both spaces and other assets.

Dependents – Look at any asset in your portfolio and know right away whether it has a dependent relationship with another asset. IT asset relationships can be complex... a router feeds a switch that feeds several PCs... being able to easily see how all your assets relate to each other simplifies the tracing of issues to find the offending device.

Dependent Spaces – Assets can service both other assets and spaces (think air handlers for example). With Evolve you can show what spaces depend on what assets and view those relationships in a number of useful ways.



Space Groups

The idea of space groups is to take some number of spaces and designate them for hoteling or other temporary/alternate use.

You can then assign occupants and assets to the space group as needed. The space group record tracks all the spaces, occupants and assets assigned to it. You can manage any number of space groups in Evolve.

Space Groups can be themed on floor plans to easily see what areas a space group occupies.

Allocation Breakdown

Some clients (notably in higher education) need a more granular breakdown of allocations relating to tracking space usage for funding and research purposes. Allocation breakdown allows for the tracking and reporting of this more granular allocation of space functions.

Requester

Our Requester module provides a modern, budget friendly way for you to put work request capability on the desktop of everyone in your organization. Requester only checks out a single concurrent user license from your pool, no matter how many people are actively submitting or checking on their work requests.

Work Requests include the option to add a picture of the asset/problem the request is about. If the device you are creating the request from has a camera, you can take a picture during the request creation process and add it "on the fly".

Also, Requester can be made available from the Evolve menu, your Evolve Dashboard or from an internal company web site or Intranet site. This means that users don't even need to log into Evolve to make work requests.

Work Order Scheduling Calendar

The Scheduling Calendar component takes the calendar to the next level. Each technician's skill sets are matched against the requirements of the work order to determine who it will be assigned to. Color coding is used extensively to help you determine who should be working on what when.

Multiple view choices let you look at work orders, calendars and technician assignments in whatever way you like that makes them easiest to manage. You have full drag and drop control when reassigning work orders to different people at different times.

Scheduling adds a really powerful component to the Evolve Work Order Management component.