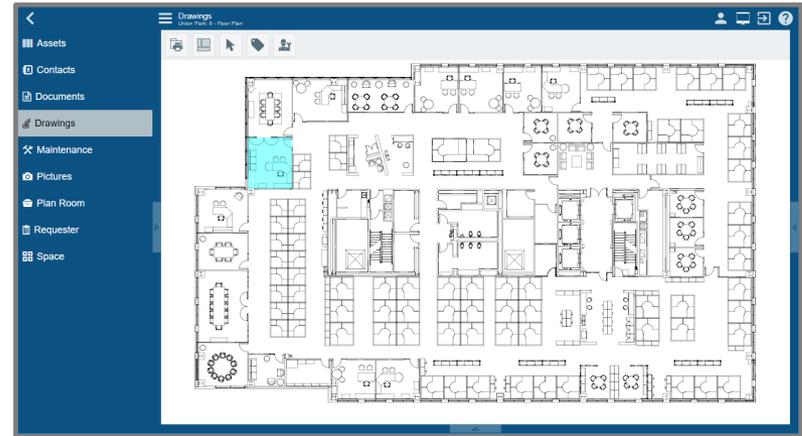


EVOLVE “2”



Tutorial: The new EvolveFM Interface



The major enhancement in this release comes with the conversion of the **Drawing Viewer to HTML5**, moving EvolveFM closer to its full conversion to a device independent platform. All features & functions have not yet been migrated to HTML5 so for now you have access to both the “Classic” interface (use your same URL) and to the new “Evolve2” interface.

The image illustrates the EvolveFM interface across different devices. The desktop view shows a drawing viewer for a floor plan of Union Park 8. The mobile view shows a list of maintenance work orders, and the tablet view shows a list of occupants.

Desktop View: Drawings
Union Park 8 - Floor Plan

Mobile View: Maintenance
My Work Orders

Work Order ID	Description	Date	Status	Type
#166 FIRE EXTINGUISHERS (monthly OPT1)	Corporate HQ Fire Extinguisher Monthly Inspection with PDF of Task List	2015-02-18 16:05:56	Open	Preventive
#163 NPC3-4: NETWORK PRINTER-12	Corporate HQ Fire Extinguisher Monthly Inspection with PDF of FE List	2014-11-09 12:15:27	Open	MAINTENANCE

Tablet View: Occupants

Name	Category
Acevedo, Alfred N	Full Time
Adair, Jeff M	Full Time
Adamowicz, Margaret G	Full Time
Adams, Ann E	Full Time
Adams, Susan U	Full Time
Addy, Nii I	Contractor
Agolli, Irena N	Full Time
Agwanda, Chispine W	Contractor
Ala-Nisula, Mai S	Full Time
Alban, Adriana T	Full Time
Almond, Michael C	Full Time

IMPORTANT – NEW BROWSER REQUIREMENT! The migration to HTML5 requires that you login to Evolve (both the Classic & the New interface) with an HTML5 compliant browser. **Minimum Requirement IE 10** (not running in Compatibly Mode).

The latest versions of Apple Safari, Google Chrome, Mozilla Firefox, and Opera all support many HTML5 features and Internet Explorer 10 will also have support for some HTML5 functionality. The mobile web browsers that come pre-installed on iPhones, iPads, and Android phones all have excellent support for HTML5.

Take the HTML5 Browser Test:

You can check your browser's HTML5 compatibility at this URL: <https://html5test.com/index.html>

A fully compatible HTML5 browser **scores 555 points**, so the closer to that number you get the more HTML5 features are supported by your browser.

Some Desktop Browser Examples:

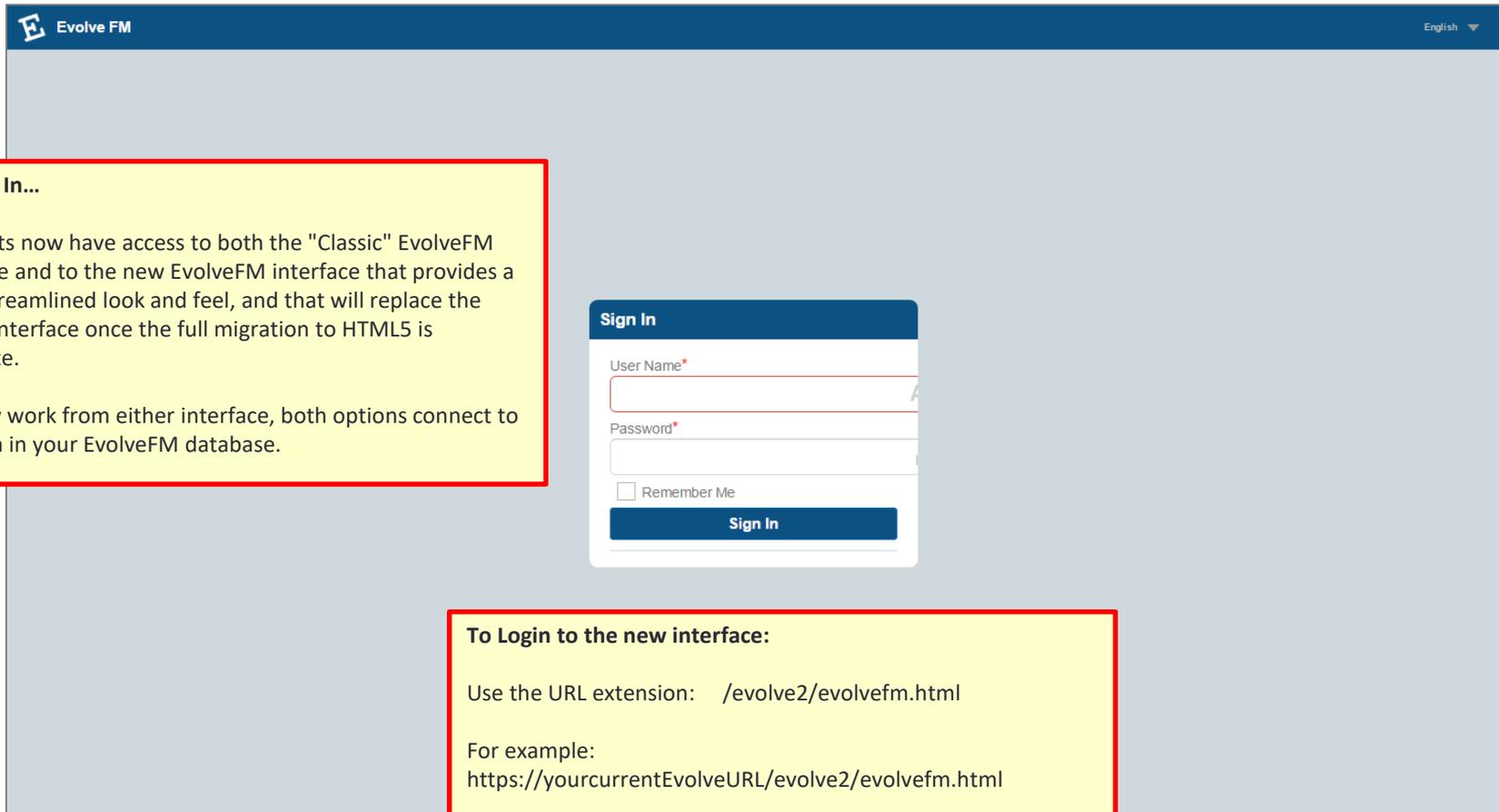


Using your browser, go to the URL listed above to rate your browser... Using CHROME 55 a sample rating is below:

Chrome Dev 55.0.2883.87 on Windows 10:



Login to “Evolve2” using the URL extension shown below, and your same User Name & Password. For now work from either the Classic interface or from the Evolve2 interface, both options connect to the data in your EvolveFM database.



Logging In...

All clients now have access to both the "Classic" EvolveFM interface and to the new EvolveFM interface that provides a more streamlined look and feel, and that will replace the Classic interface once the full migration to HTML5 is complete.

For now work from either interface, both options connect to the data in your EvolveFM database.

Sign In

User Name*

Password*

Remember Me

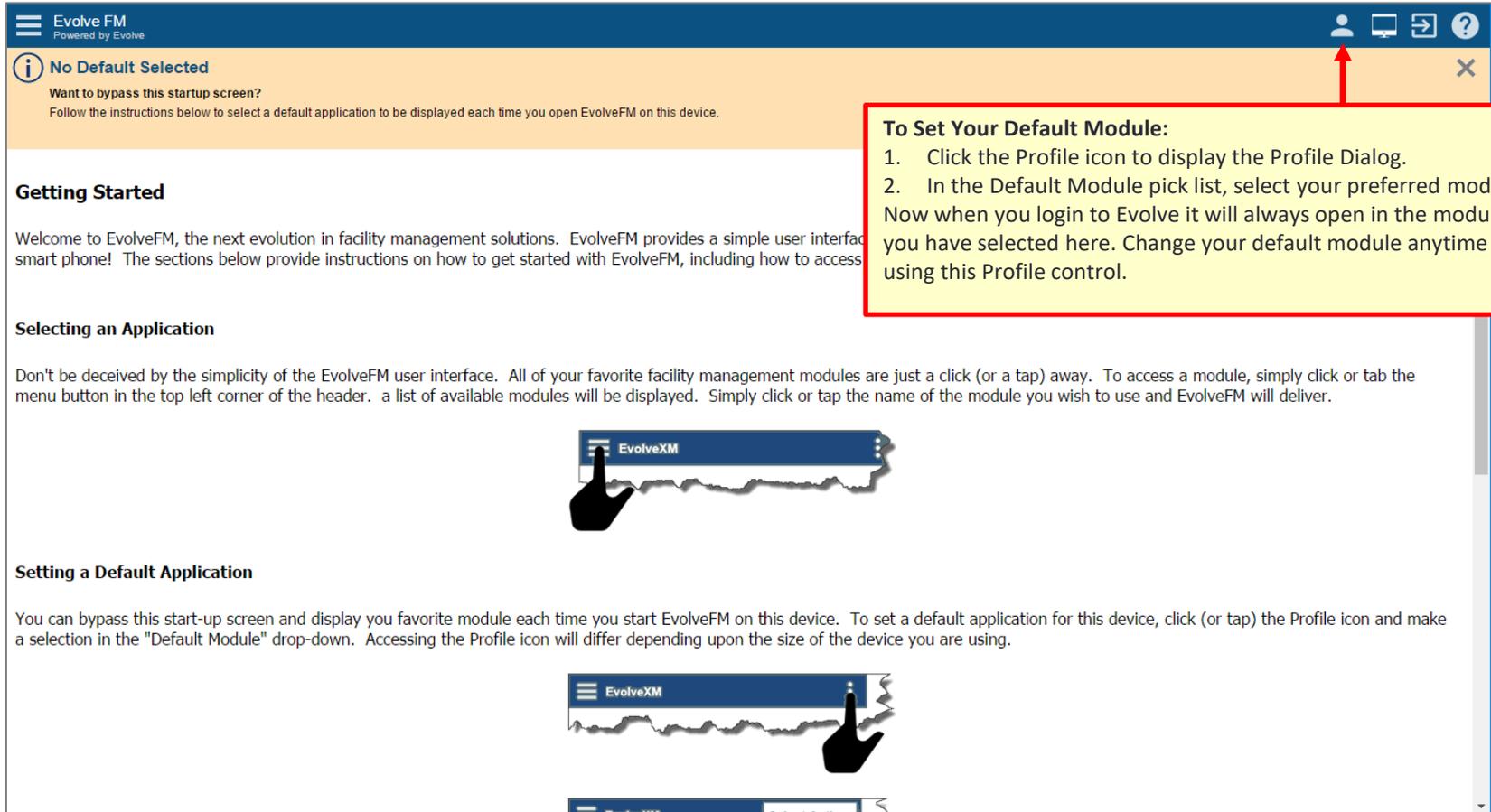
Sign In

To Login to the new interface:

Use the URL extension: `/evolve2/evolvefm.html`

For example:
`https://yourcurrentEvolveURL/evolve2/evolvefm.html`

When you login to the new **EvolveFM** interface for the first time the Getting Started page will display. This page will always display until you set your Evolve default module as shown below. NOTE: The directions on this page are not quite up to date, please follow the tutorial instruction to set you default module.



Evolve FM
Powered by Evolve

No Default Selected
Want to bypass this startup screen?
Follow the instructions below to select a default application to be displayed each time you open EvolveFM on this device.

Getting Started

Welcome to EvolveFM, the next evolution in facility management solutions. EvolveFM provides a simple user interface on your smart phone! The sections below provide instructions on how to get started with EvolveFM, including how to access various modules.

Selecting an Application

Don't be deceived by the simplicity of the EvolveFM user interface. All of your favorite facility management modules are just a click (or a tap) away. To access a module, simply click or tap the menu button in the top left corner of the header. A list of available modules will be displayed. Simply click or tap the name of the module you wish to use and EvolveFM will deliver.



Setting a Default Application

You can bypass this start-up screen and display your favorite module each time you start EvolveFM on this device. To set a default application for this device, click (or tap) the Profile icon and make a selection in the "Default Module" drop-down. Accessing the Profile icon will differ depending upon the size of the device you are using.



To Set Your Default Module:

1. Click the Profile icon to display the Profile Dialog.
2. In the Default Module pick list, select your preferred module.

Now when you login to Evolve it will always open in the module you have selected here. Change your default module anytime using this Profile control.

The **EvolveFM Application Menu Bar** is located along the top edge of the Evolve application.



Main Navigation Menu.
Click to expand the
EvolveFM module list.

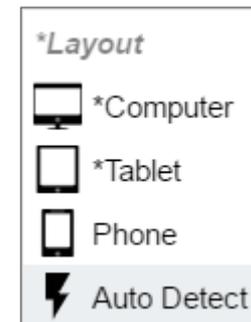
1. **Profile.** Click to display the Profile Dialog.
2. **Layout.** Device default layout options (see About Layout Options).
3. **Logout.** Click to logout of EvolveFM
4. **Help.** Click to display EvolveFM Help options (limited at this time)

About Layout Options:

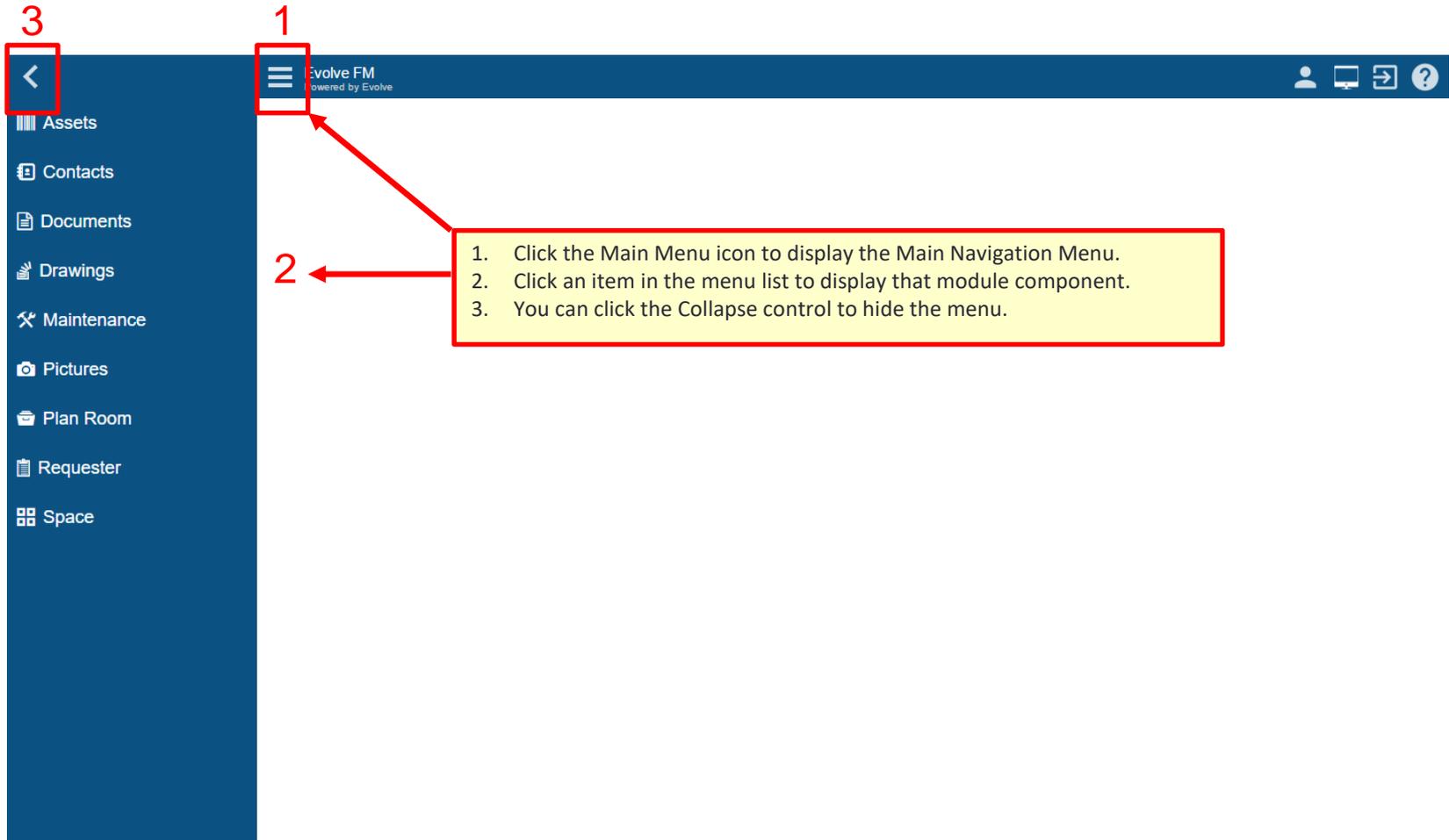
The new EvolveFM interface formats its interface layout based on the device type used at login.

If you would like to select a default layout you can choose from the options provided in the Layout Menu.

The Auto Detect option will automatically layout the Evolve interface to Computer, Tablet, or Phone based on the device type used at login.



The **Main Navigation Menu** replaces the Classic “Desktop” icons and is used to navigate between all EvolveFM module components.



The **Page Bar Menu** remains the same as in the Classic interface, and is used to navigate between pages within a module component.

The screenshot displays the EvolveFM interface. At the top, a dark blue header contains the 'Space' logo and navigation icons. Below this is a 'Page Bar Menu' with tabs for 'Properties', 'Buildings', 'Floors', 'Space', and 'Occupants'. The 'Buildings' tab is active. A table below the menu lists building information. Two red boxes highlight the 'Space' logo and the 'Page Bar Menu' tabs. Two yellow callout boxes provide additional context.

Building ID	Name	Description	Type	Total Area	Property	Address
	160 Canal Street	Office Space	Building	51,794.00	Manchester NH	160 Canal Street
	8 Harrison Street	Office Space	Building	16,036.00	Harmon Technologies	8 Harrison Street
	Daniel Webster Highway		Building	98,307.00	Merrimack NH	
	Fitness Center	Employee health and fitness center	Building	25,202.00	Corporate HQ	100 Union Park Avenue
	Street				DC Manufacturing	10 Mechanic Street
					Corporate HQ	90 Union Park Avenue
	Washington Street	Office Space	Building	30,000.00	Corporate HQ	1358 Washington Street

NOTE: The active module component is displayed here.

Page Bar Menu. Module components that include multiple pages are navigated using the Page Bar Menu.

The new **Grid Menu Bar** contains the controls to manage records within a grid list.

The screenshot displays the EvolveFM interface with a grid of building records. The Grid Menu Bar is highlighted with a red box and numbered 1 through 5. A yellow callout box provides instructions for each icon. A search bar is also highlighted with a red box and labeled 'Quick Search controls.'

ID	Description	Type	Total Area	Property	Address
1	al Street	Building	51,794.00	Manchester NH	140 Canal Street
2	8 Harrison Street		16,036.00	Harmon Technolog	
3	Daniel Webster Highw		98,307.00	Merrimack NH	
4	Fitness Center		35,303.00	Corporate HQ	100 Union Park Avenue
5	Mechanic Street		76,336.00	DC Manufacturing	10 Mechanic Street
	Union Park		45,863.00	Corporate HQ	90 Union Park Avenue
	Washington Street		38,066.00	Corporate HQ	1358 Washington Street

- 1. Advance Search.** Click to display the Advanced Search controls.
- 2. New.** Click to create a new data record.
- 3. Remove.** Click to remove selected data records.
- 4. Open.** Click open a selected data record.
NOTE: Multi select/open/edit is available in the Space grid and in the Asset grid.
- 5. More Actions.** Contains grid display options which are used to view the grid in List View or Grid View. Export, Import, and Print functions will be added in a future release.

Quick Search controls.

Grid lists are no longer sectioned into multiple pages, instead the grid list is one long list making the grid much more user friendly. Note: Currently there is no Column Menu symbol located on the column headers, however you can still access the Column Menu by clicking to the far right of the column header.

Space
Powered by Evolve

Properties Buildings Floors Space Occupants

Search for ...

Space ID	Space Name	Description	Space Category	Space Class	Space Sub Class	Area
U9-396	Roxbury		Usable Area	Business Support	Conference 10	284.0
U8-256	Roslindale		Usable Area	Business Support	Conference 4	146.0
U8-392	North End		Usable Area	Business Support	Conference 6	243.9
U9-384	Mission Hill		Usable Area	Business Support	Conference 10	284.9
U9-392	Jamaica Plain		Usable Area	Business Support	Conference 6	244.9
U8-384	Hyde Park		Usable Area	Business Support	Conference 10	284.9
U8-262	Dorchester		Usable Area	Business Support	Conference 4	135.9
U9-388	Charlestown		Usable Area	Business Support	Conference 12	467.9
U8-252	Brighton		Usable Area	Business Support	Conference 4	135.9
HNEB-152M	BOILER ROOM		Service Area	Plant Mechanical	Boiler Room	3,299.0
U8-388	Bay		Usable Area	Business Support	Conference 12	467.9
U8-214	Back Bay		Usable Area	Business Support	Conference 8	339.0
U8-264	Allston		Usable Area	Business Support	Conference 4	135.9
U8-266			Usable Area	Personnel Service	Lounge Area	230.0
U8-260			Usable Area	Storage	Storage Room	379.0
U8-380			Usable Area	Personnel Service	Break Room	157.0
U8-218			Usable Area	Office	Office Executive Sr	308.0

1730

Space Name

Click column header to sort the column data ascending/descending, or click to the far right of the column header to display the Column Menu.

Total number of data records in the grid list.

The new **Column Selector** and the **Alphanumeric Filter Controls** are a fast and easy way to filter the grid list data.

The screenshot displays the EvolveFM interface with a grid of space data. The grid has columns for Space ID, Space Name, Description, Space Category, Space Class, Space Sub Class, and Area. The 'Space Class' column is selected in the Column Selector, and the 'U' filter is active in the Alphanumeric Filter list. The grid shows rows for various service areas, including C2-106, U8-144, U8-116, and U8-118.

Space ID	Space Name	Description	Space Category	Space Class	Space Sub Class	Area
C2-106			Service Area	Utility	Electrical Closet	45.9
			Service Area	Utility	Janitor Closet	95.0
			Service Area	Utility	Mechanical Room	17.5
			Service Area	Utility	Waste/Recycling	270.9
			Service Area	Utility	Telecom Room	64.4
			Service Area	Utility	Electrical Closet	45.9
			Service Area	Utility	Janitor Closet	95.0
			Service Area	Utility	Telecom Room	64.4
			Service Area	Utility	Mechanical Room	17.5
			Service Area	Utility	Mechanical Room	133.0
			Service Area	Utility	Janitor Closet	11.9
			Service Area	Utility	Janitor Closet	11.9
			Service Area	Utility	Janitor Closet	128.4
			Service Area	Utility	Janitor Closet	104.9
U8-144			Service Area	Utility	Mechanical Room	201.3
U8-116			Service Area	Utility	Electrical Closet	146.7
U8-118			Service Area	Utility	Mechanical Room	146.7

1. **Column Selector.** The column selected here will automatically be sorted based on the active state (ascending/descending) of the **Column Sort Control**. The Column Selector control also identifies the data column (in this example Space Class) to be used in the alphanumeric filter search.

2. **Alphanumeric Filter Controls.** The letter/number selected in the Alphanumeric Filter list defines the search criteria (the letter U in this example). Notice here in this example that the Space Class column (which is selected in the Column Selector) has been filtered to data that begins with the letter U (the letter selected in the Alphanumeric Filter).

To CLEAR FILTER: Re-click the letter/number selected in the Alphanumeric Filter list (the letter U in this example).

Alphanumeric Filters

Column Selector

Column Sort Control

Use to Hide/Show Alphanumeric Filter List

You are now able to view your grid lists in either **Grid View** or **List View**, Grid View being the typical grid list display and List View being a more mobile friendly view. The Auto Detect option will auto detect which view is more compatible with the device you are using (phone, tablet, etc.)

The **More Actions** menu contains the grid display options Grid View, List View, and Auto Detect.

Pict...	Name	Last Name	First Name	Company Name	Email	Cost Center
	Alfred N Acevedo	Acevedo	Alfred N			Sales (304)
	Jeff M Adair	Adair	Jeff M			Administration (501)
	Margaret G Adamowicz	Adamowicz	Margaret G			Program Management (302)
	Ann E Adams	Adams	Ann E			Product Marketing (100)
	Susan U Adams	Adams	Susan U			Technical Development (720)
	Nii I Addy	Addy	Nii I			Administration (501)
	Irena N Agolli	Agolli	Irena N			Administration (501)
	Chrispine W Agwanda	Agwanda	Chrispine W			
	Mai S Ala-Nisula	Ala-Nisula	Mai S			
	Adriana T Alban	Alban	Adriana T			

1022

Store

Last Name

The **Drawing Viewer** has been streamlined for easier navigation.

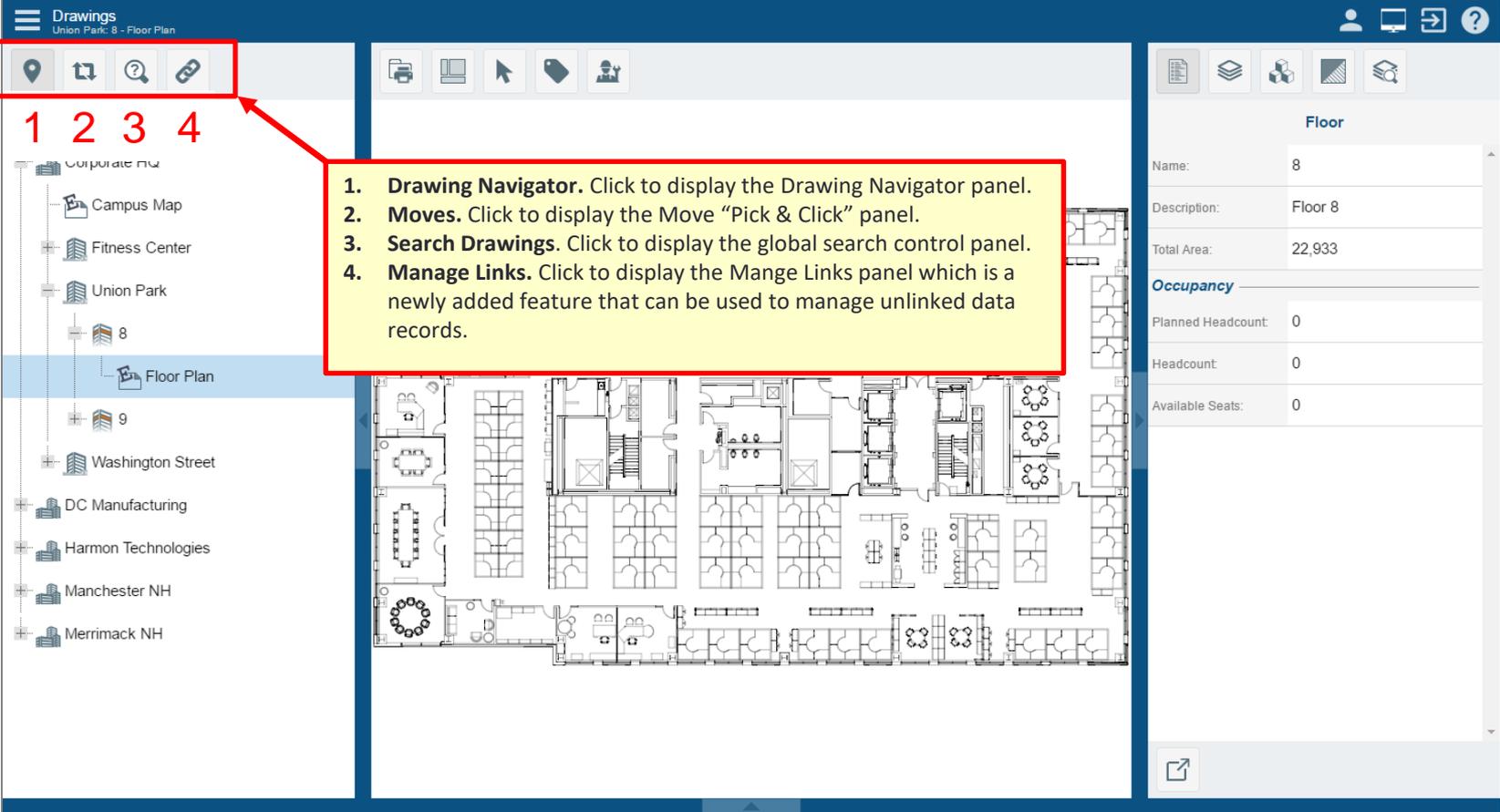
The screenshot displays the EvolveFM Drawing Viewer interface. The main window shows a detailed floor plan of Union Park, Floor 8. The interface is divided into three main sections:

- Left Panel (Navigation):** A tree view under the heading "SSFM International" lists various locations. "Union Park" is expanded, and "Floor Plan" is selected. Other locations include Corporate HQ, Campus Map, Fitness Center, Washington Street, DC Manufacturing, Harmon Technologies, Manchester NH, and Merrimack NH.
- Top Panel (Tools):** A toolbar with icons for navigation and drawing tools, including a location pin, refresh, search, link, print, zoom, pan, and help.
- Right Panel (Properties):** A panel displaying properties for the selected floor plan. It includes a "Floor" section with a table of details and an "Occupancy" section with a table of details.

Floor	
Name:	8
Description:	Floor 8
Total Area:	22,933

Occupancy	
Planned Headcount:	0
Headcount:	0
Available Seats:	0

The **Drawing Navigator** menu replaces the previous “stacked” panel access.



The screenshot displays the EvolveFM interface with the Drawing Navigator menu highlighted. The menu items are numbered 1 through 4, corresponding to the instructions in the callout box. The interface shows a tree view of drawing items on the left, a central drawing area, and a right-hand panel with details for the selected drawing.

1. Drawing Navigator. Click to display the Drawing Navigator panel.

2. Moves. Click to display the Move “Pick & Click” panel.

3. Search Drawings. Click to display the global search control panel.

4. Manage Links. Click to display the Mange Links panel which is a newly added feature that can be used to manage unlinked data records.

Floor	
Name:	8
Description:	Floor 8
Total Area:	22,933
Occupancy	
Planned Headcount:	0
Headcount:	0
Available Seats:	0

The **Drawing Viewer** menu replaces the previous ribbon menu.

The screenshot displays the EvolveFM interface with a floor plan of Union Park 8. A red box highlights the Drawing Viewer menu icons, which are numbered 1 through 5. A red arrow points from the first icon to a yellow callout box containing a list of instructions.

1. File Options. Click to display the File Options menu.

2. Work Space. Click to display the Work Space menu.

3. Drawing Tools. Click to display the Drawing Tools menu.

4. Labels. Click to display the Labels menu.

5. Maintenance. Click to display the Maintenance menu.

The interface also shows a left sidebar with a tree view of locations, including Corporate HQ, Campus Map, and various sites like Washington Street, DC Manufacturing, Harmon Technologies, Manchester NH, and Merrimack NH. The right sidebar displays details for Floor 8, including Name, Description, Total Area, and Occupancy information.

Floor	
Name:	8
Description:	Floor 8
Total Area:	22,933
Occupancy	
Planned Headcount:	0
Headcount:	0
Available Seats:	0

The **Drawing Options** menu replaces the previous “stacked” panel access.

The screenshot displays the EvolveFM interface with a floor plan of Union Park 8. The Drawing Options menu is highlighted in a red box at the top right, containing five icons labeled 1 through 5. A yellow callout box with a red border provides instructions for each icon:

1. **Attributes.** Click to display the attributes panel.
2. **Layers.** Click to display the Layers panel.
3. **Objects.** Click to display Objects panel.
4. **Themes.** Click to display the Themes panel.
5. **Plan Views.** Click to display the Plan Views panel.

The right-hand panel shows the following data:

Name:	8
Description:	Floor 8
Total Area:	22,933
Occupancy	
Planned Headcount:	0
Headcount:	0
Available Seats:	0

An 'Open Record' button is located at the bottom right, with a red arrow pointing to its icon.

The **Drawing Grids** contain the same Alphanumeric Filter controls as shown previously. Also, each panel now has easier to access Collapse/Expand panel controls.

The screenshot displays the EvolveFM interface with a floor plan drawing and a data table. Red annotations highlight specific features:

- Collapse/Expand Panel controls:** A yellow box with red arrows pointing to the left and right sides of the drawing grid.
- Alphanumeric Filters:** A yellow box with a red arrow pointing to the filter controls on the right side of the table.
- Table Actions:** A yellow box with a red arrow pointing to a numbered list of actions (1-6) on the table toolbar.

Cost Center	Space Category	Space Class	Space Sub Class	Description
	Floor Common Area (FCA)	Usable Area	Personnel Service	First Aid
U8-112	Floor Common Area (FCA)	Service Area	Primary Circulation	
U8-116	Floor Common Area (FCA)	Service Area	Utility	Electrical Closet

1. Advanced Search
2. Spaces
3. Occupants
4. Assets
5. Open Record
6. More Actions

THE END

This concludes this tutorial.

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