

# Introduction to Facility Manager

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AUTODESK® FMDesktop

*Training Guide*

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Introduction to Facility Manager Training Guide, version 2009

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# Section 7: Move Management

## In This Section:

- ▶ Making Moves in Facility Manager
- ▶ Move Projects
  - Project Form

## Tutorials:

- ▶ Single Occupant Moves
- ▶ Using the Project Form for a Group Move

## Making Moves in Facility Manager

Moves in Facility Manager can be performed using several forms:

- Drawing Form
- Occupant Form
- Space Form
- Project Form

Move management in Facility Manager can be as simple as moving a single occupant, or as complex as moving large groups of occupants, such as during a renovation project.

### **Allocating Space**

The tutorials in this section will use the default move options as shown in the Move Options form below.

#### MOVE OPTIONS FORM –DEFAULT SETTINGS

The screenshot shows a dialog box titled "Move Options" with a blue title bar and standard window controls. The dialog is divided into several sections:

- Move Out Options:** Contains two radio buttons: "Do Nothing" (unselected) and "Allocate" (selected).
- Vacant Options:** Contains two radio buttons: "Do Nothing" (selected) and "Assign Default Cost Center" (unselected).
- Default Allocation:** Contains three radio buttons: "Do Nothing" (unselected), "Equally By Cost Center" (selected), and "Equally By Occupant Count" (unselected).
- Default Vacant Cost Center:** A dropdown menu currently showing "<none>".

At the bottom right of the dialog are "OK" and "Help" buttons.

#### **WARNING!**



Move Options should be determined and set before you begin to build your database. Changing the Default Allocation settings after space has already been allocated in the FMDesktop database will overwrite all existing space allocation data.




## TUTORIALS: Single Occupant Moves

### Moving an Employee into a Space Using the Drawing Form

In the following example, we will query floor 1 of the Data Center building to find a vacant office for a new employee. We will then move the occupant into the vacant space using the Occupants tab in the detail window of the Drawing form.

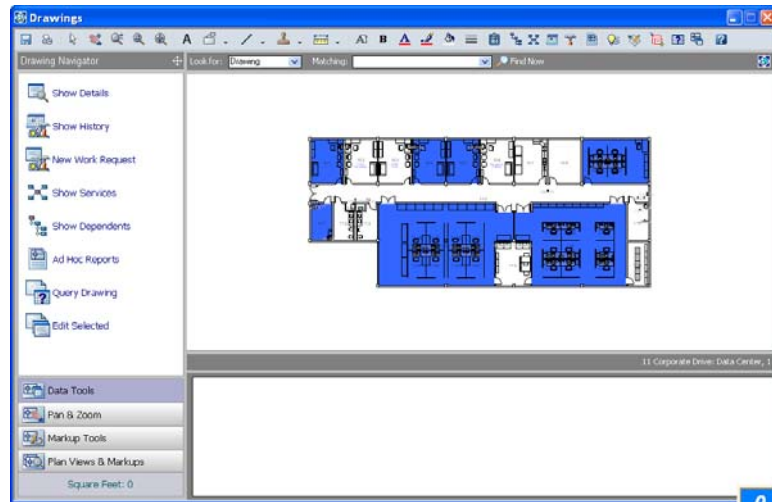
1. On the Facility Manager **Main Menu**, click **Actions**, and then click **Drawings** to open the Drawing form.
2. On the Drawing form, use the search controls to look for drawing **Data Center,1** (remember to click **Find Now**).

#### Query the Drawing for a Vacant Space

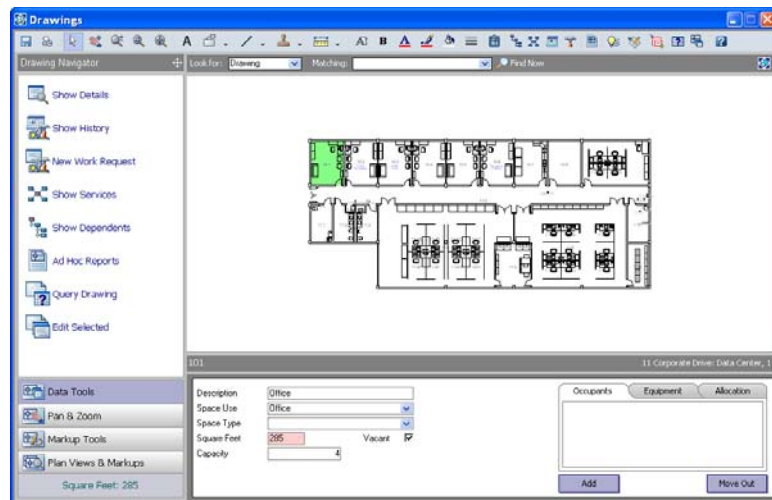
3. On the **Drawing Navigator** palette, click **Query Drawing** to open the Query Drawing form.
4. On the Query Drawing form, click  **Clear Query Text** to clear any previous query statements from the form.
5. On the **Spaces tab**, in the **Field Name** list box, scroll to the bottom of the list and select **Vacant**.
6. In the **Operator** list box, select = (equal to).
7. In the **Value** list box, select **True**.
8. On the Query Drawing form, click **Select Hatch**.
9. On the Select Hatch form, click the **Color** box fly-out to display the color palette and select a color.
10. Click the **Pattern** box fly-out to display the pattern palette and select a pattern (solid is the default pattern).
11. Click **OK**.
12. On the Query Drawing form, click  **Run Query**.
13. Close  the Query Drawing form.

All vacant spaces on the drawing are displayed in the hatch color and pattern selected on the Query Drawing form.

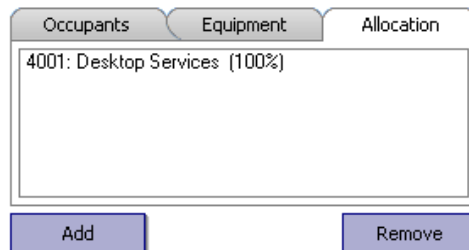
QUERY RESULTS



- On the Drawing form, click vacant **space 101** located in the top left corner of the drawing. You can see in the detail window that the **Vacant** checkbox is selected and that the **Occupants** tab is empty.



- In the detail window, click the **Allocation** tab and you'll see that the selected vacant space is currently allocated to cost center 4001: Desktop Services.



### Add the New Employee to the Occupant List


Since the occupant we are assigning to the space is a new employee not yet entered into the program, we must add them to the database.

16. On the Drawing form, in the detail window, click the **Occupants tab**.
17. Click **Add**.
18. On the Select Occupant form, click **New**.

Because the Occupant text box is highlighted in blue, it is the only required field on the Occupant form.

19. In the **Occupant** text box, enter the occupant's name as **Ahern, Lee**.

### Assign Cost Center to Space On Move In

20. On the Occupant form, in the **Cost Center** list box, select **1001: Administration** to assign the occupant to that cost center.
21. To assign the occupant's cost center to space 101 when we move them into the space, select the **Assign Cost Center to Space On Move In** checkbox.
22. Close  the **Occupant form**.
23. On the Select Occupant form, select **Ahern, Lee** from the list of occupants.
24. Click **OK** to close the form and assign (move in) the occupant to space 101.

25. In the detail window, click the **Allocation tab** and you'll see that the space is now allocated to the occupant's assigned cost center, 1001: Administration.

The screenshot shows a software window with three tabs: 'Occupants', 'Equipment', and 'Allocation'. The 'Allocation' tab is active. Inside the window, there is a text area containing the text '1001: Administration (100%)'. Below this text area are two buttons: 'Add' on the left and 'Remove' on the right.

### Relocating an Existing Employee Using the Occupant Form


In the following exercise, employee Jane Hanson has been promoted. We have to relocate Jane to a larger office on the same floor of the building where she currently resides.



1. On the Facility Manager **Main Menu**, click **Actions**, and then click **Drawings** to open the Drawing form.
2. On the Drawing form, use the search controls to look for occupant **Hanson, Jane** (remember to click **Find Now**).

When the occupant's space is found, the drawing is displayed and their space is highlighted in green.

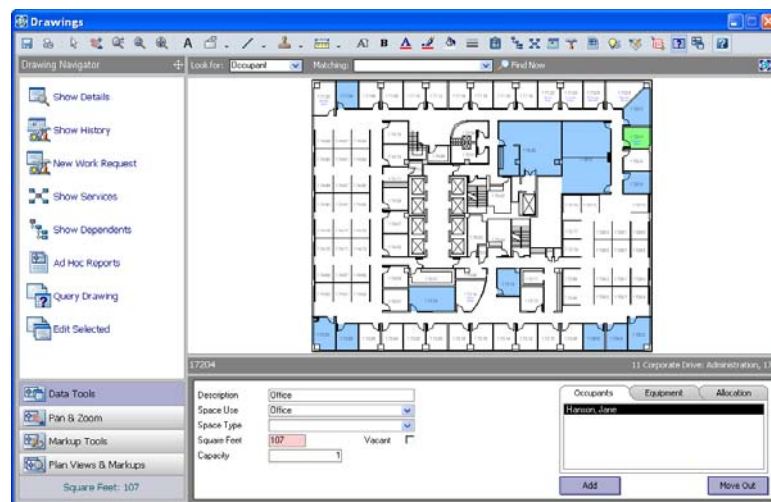
We can see on the Drawing form, in the detail window, that Jane currently resides in space 17204, and the size of that space is 107 Square Feet. (The red highlighted field displays the calculated Square Feet of the space).

#### **Query the Drawing for a Vacant Space Greater than 107 SF**

3. In the **Drawing Navigator** palette, click **Query Drawing** to open the Query Drawing form.
4. On the Query Drawing form, click  **Clear Query Text** to clear any previous query statements from the form.
5. On the first line on the **Spaces tab**, in the **Field Name** list box, scroll to the bottom of the list and select **Vacant**.
6. In the **Operator** list box, select = (equal to).
7. In the **Value** list box, select **True**.
8. In the **Operator** list box, select **AND**.

9. On the second line of the **Spaces** tab, in the **Field Name** list box, scroll to the bottom of the list and select **Square Feet**.
10. In the **Operator** list box, select > (greater than).
11. In the **Value** list box, enter **107**.
12. On the Query Drawing form, click **Select Hatch**.
13. On the Select Hatch form, click the **Color** box fly-out to display the color palette and select a color.
14. Click **OK**.
15. On the Query Drawing form, click  **Run Query**.
16. Close  the Query Drawing form.

### QUERY RESULTS



All vacant spaces on the drawing that are greater than 107 SF are highlighted in blue. Let's move Jane into the large corner office, space 17202, located in the top right corner of the drawing, right next to her current space.

### ***Move the Occupant to the New Space***

17. If not already selected, select the space Jane currently resides in, space 17204.
18. On the Drawing form, in the detail window, click the **Occupants** tab and then double-click **Hanson, Jane** to open the Occupant form to Jane Hanson's occupant record.