



FM Move Management

This training tutorial focuses on the basics of Move Management within your MicroMain Facility Management (FM) 7.3 database. Move management basics will first be illustrated on an individual basis, covering the process of moving people in and out of spaces one at a time. Then this guide will describe how to handle the movement of multiple individuals at the same time using the FM Move Management Schedule Builder.

This tutorial will cover the essential aspects of managing people moves – both individual moves and scheduled moves. While this tutorial is not intended to provide an exhaustive list of all scenarios, it will provide a reference point for the tools you will need to manage a wide variety of real-life situations.

This session covers:

- Move an Individual Out of a Space
- Move an Individual Into a Space
- Move History
- Scheduled Moves
- Editing Move Status and Completing Move

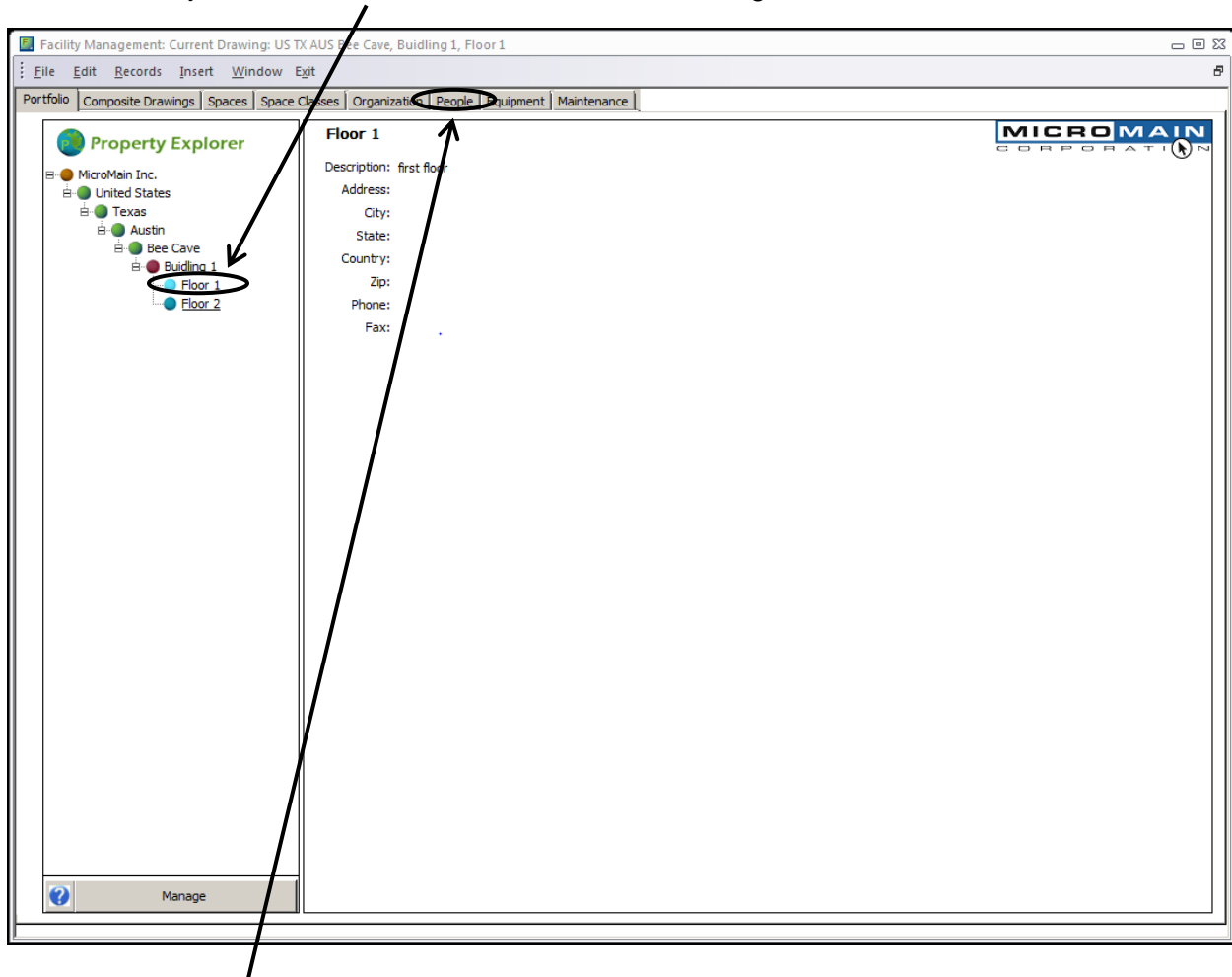
Appendix:

- Note on Facility Space Data and BOMA Standards

Move an Individual Out of a Space

People can be moved out of a space on an individual basis.

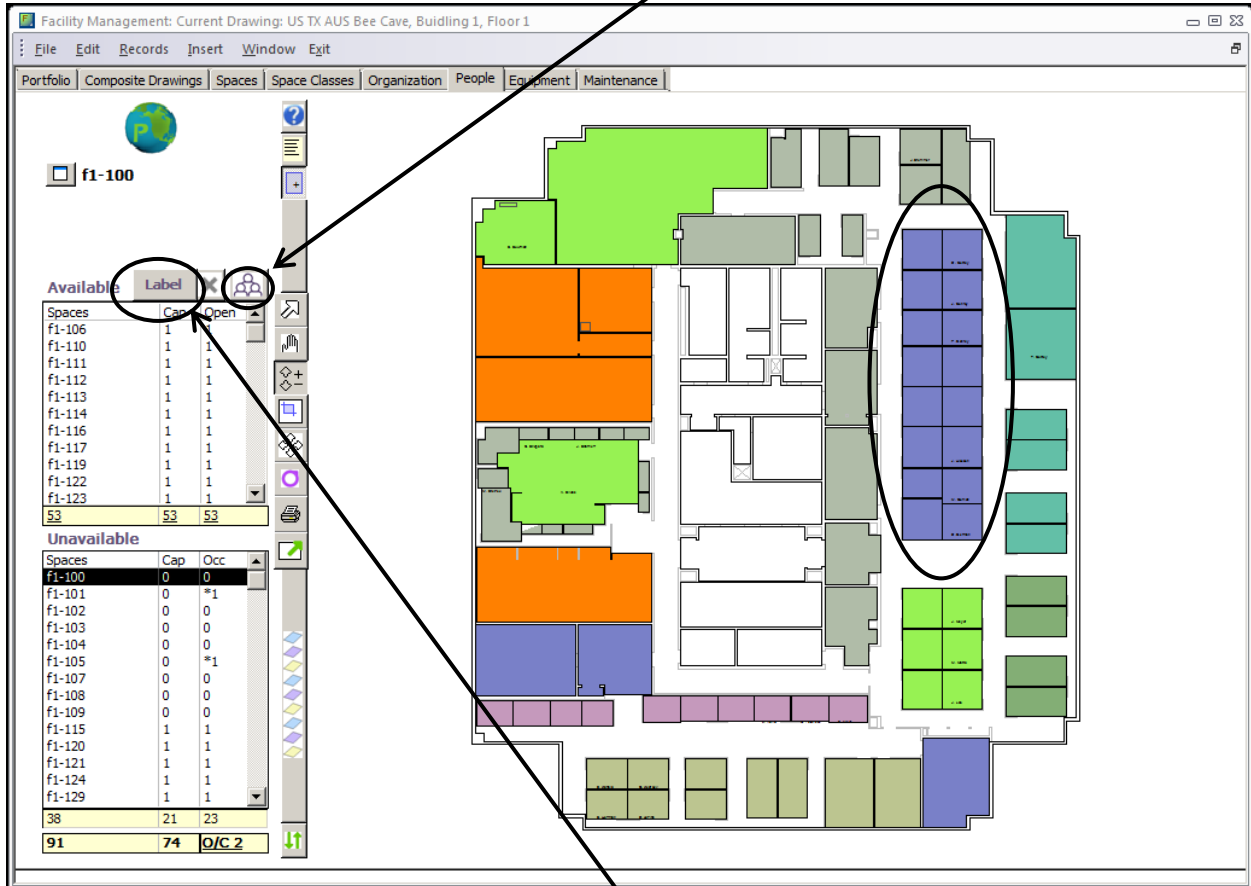
1. Select the **Building/Floor** for which you wish to manage occupants. From the Portfolio tab, use the object tree controls to **select** the desire building and floor.



2. Select the **People** tab.

FM Move Management

3. Open the **People List** by selecting the People List button.



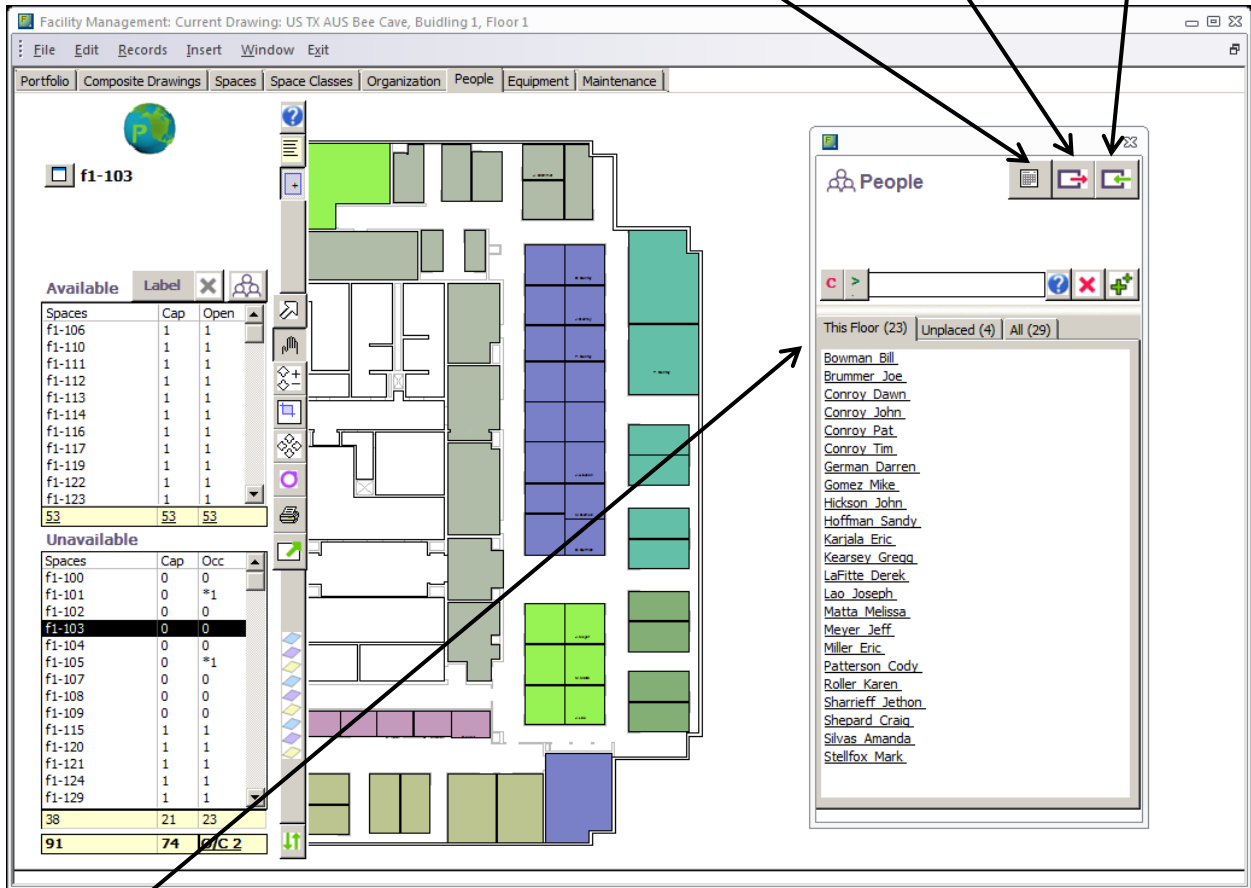
4. Turn on your people labels by selecting the **label** button.

The floor you selected in step 1 will be the floor in which you will initiate the move *out*. For the remainder of this example, we will be focusing on the column of 16 office spaces circled above.

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Controls on the People list include the **Move Management**, **Move Out**, and **Move In** buttons along the top of the list.



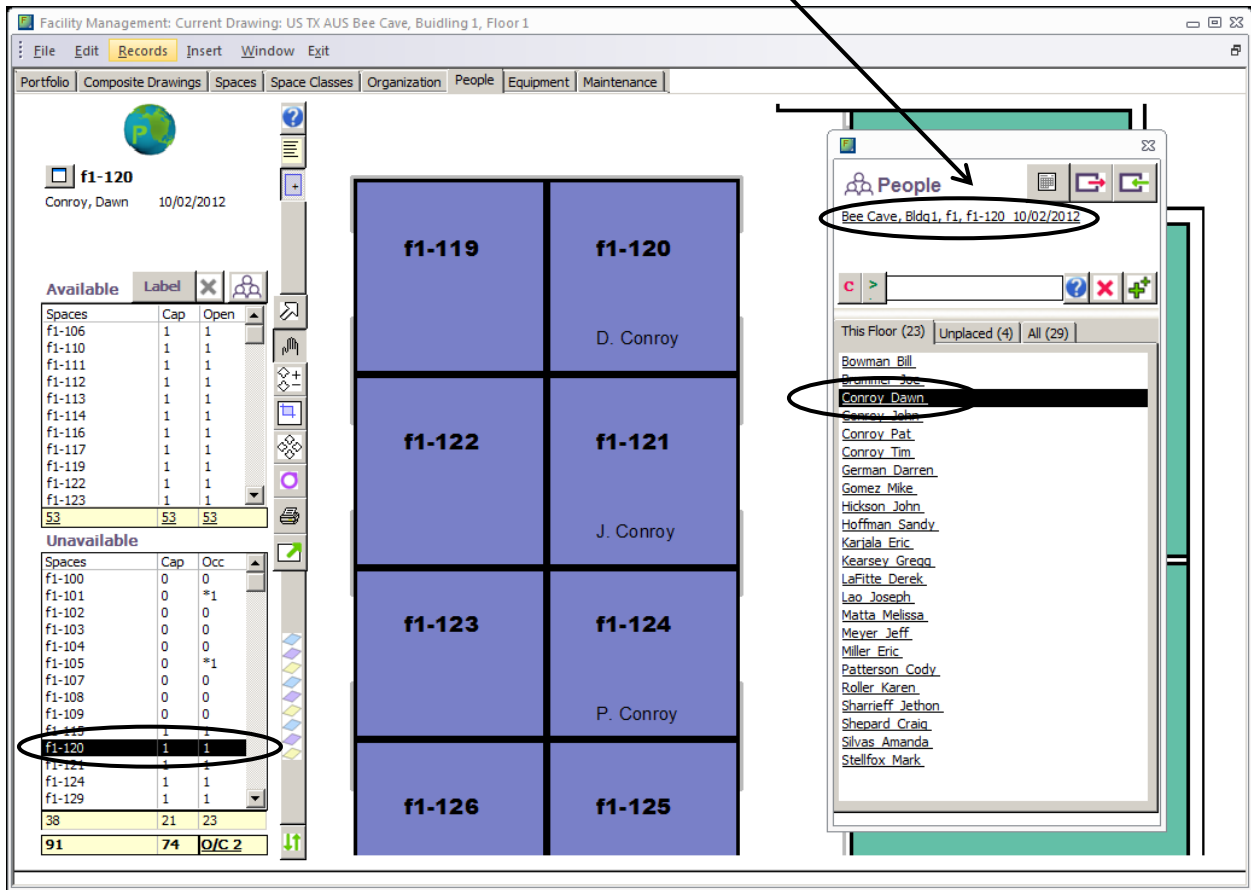
The tabs include: **This Floor** (people placed on the current floor), **Unplaced** (people not placed), and **All** (all the people within your database).



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5. Now **zoom** in to the area which you want to move people out of. In this example, we will move D. Conroy out of space f1-120. T
6. **Select** D. Conroy from the people list on the This Floor tab.

The individual will now highlighted be in the People List, and the space they currently occupy will be highlighted in the list of unavailable spaces. A listing of the space(s) occupied by this individual will appear the top of the People list.

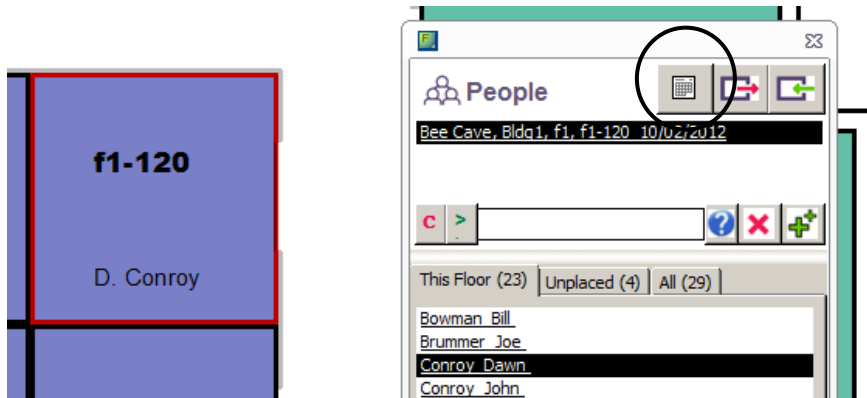


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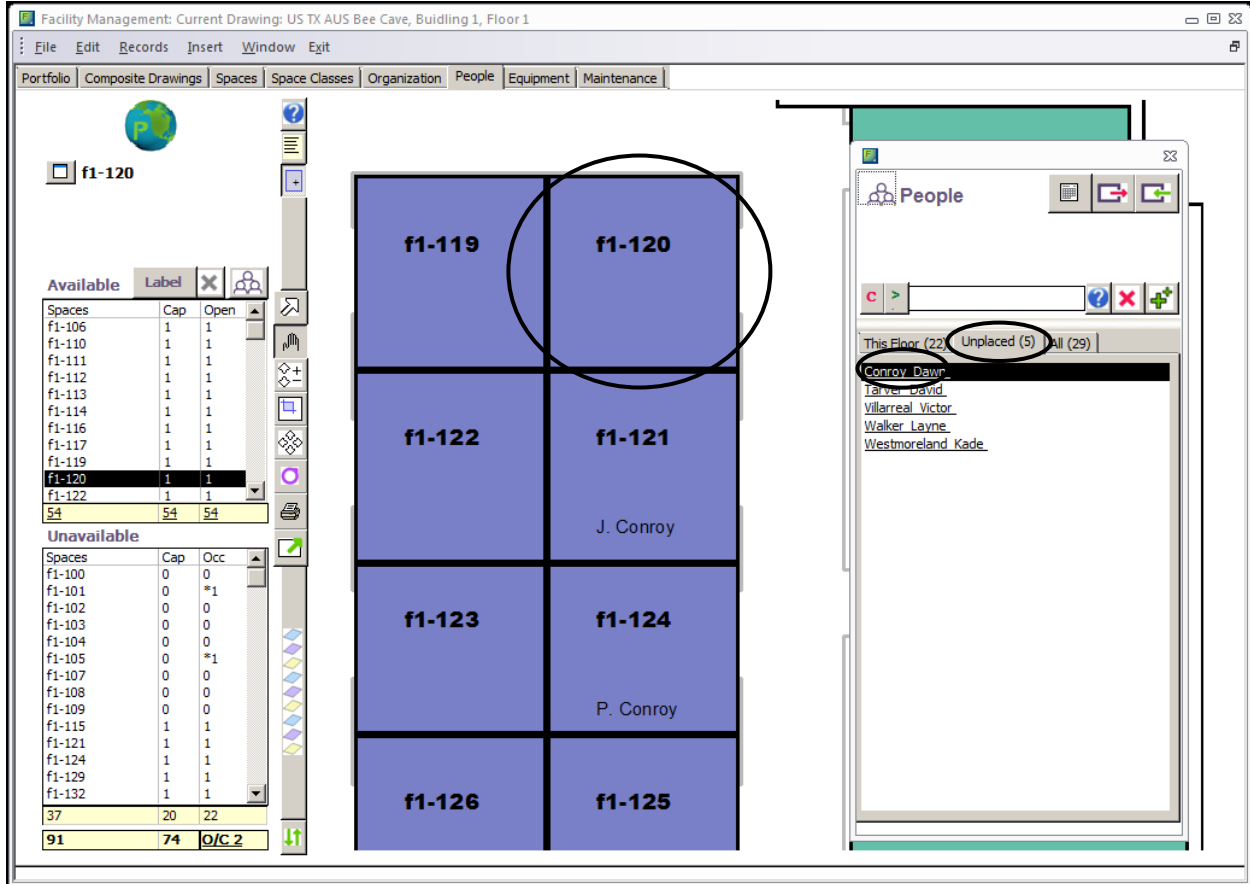
7. **Select** the space you wish to move the person *from* using the listing at the top of the People list.
8. Click the **Move Out** button at the top of the People list. The Move Out button contains a red arrow:



9. **Refresh** your people Labels by clicking on the Label button.

The individual will be removed from the space. You will see that they have also been removed from the list of people on the This Floor tab. They will now located on the Unplaced tab.

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The screenshot shows the Facility Management software interface. On the left, there are two tables: 'Available' and 'Unavailable'. The 'Available' table shows space f1-120 with 1 capacity and 1 occupancy. The 'Unavailable' table shows various other spaces. In the center, a floor plan grid shows spaces f1-119 through f1-126. Space f1-120 is circled in red. On the right, a 'People' window is open, showing a list of people. 'Conroy, Dawn' is circled in red, and 'J. Conroy' is listed below it.

Spaces	Cap	Open
f1-106	1	1
f1-110	1	1
f1-111	1	1
f1-112	1	1
f1-113	1	1
f1-114	1	1
f1-116	1	1
f1-117	1	1
f1-119	1	1
f1-120	1	1
f1-122	1	1
54	54	54

Spaces	Cap	Occ
f1-100	0	0
f1-101	0	*1
f1-102	0	0
f1-103	0	0
f1-104	0	0
f1-105	0	*1
f1-107	0	0
f1-108	0	0
f1-109	0	0
f1-115	1	1
f1-121	1	1
f1-124	1	1
f1-129	1	1
f1-132	1	1
37	20	22
91	74	O/C 2

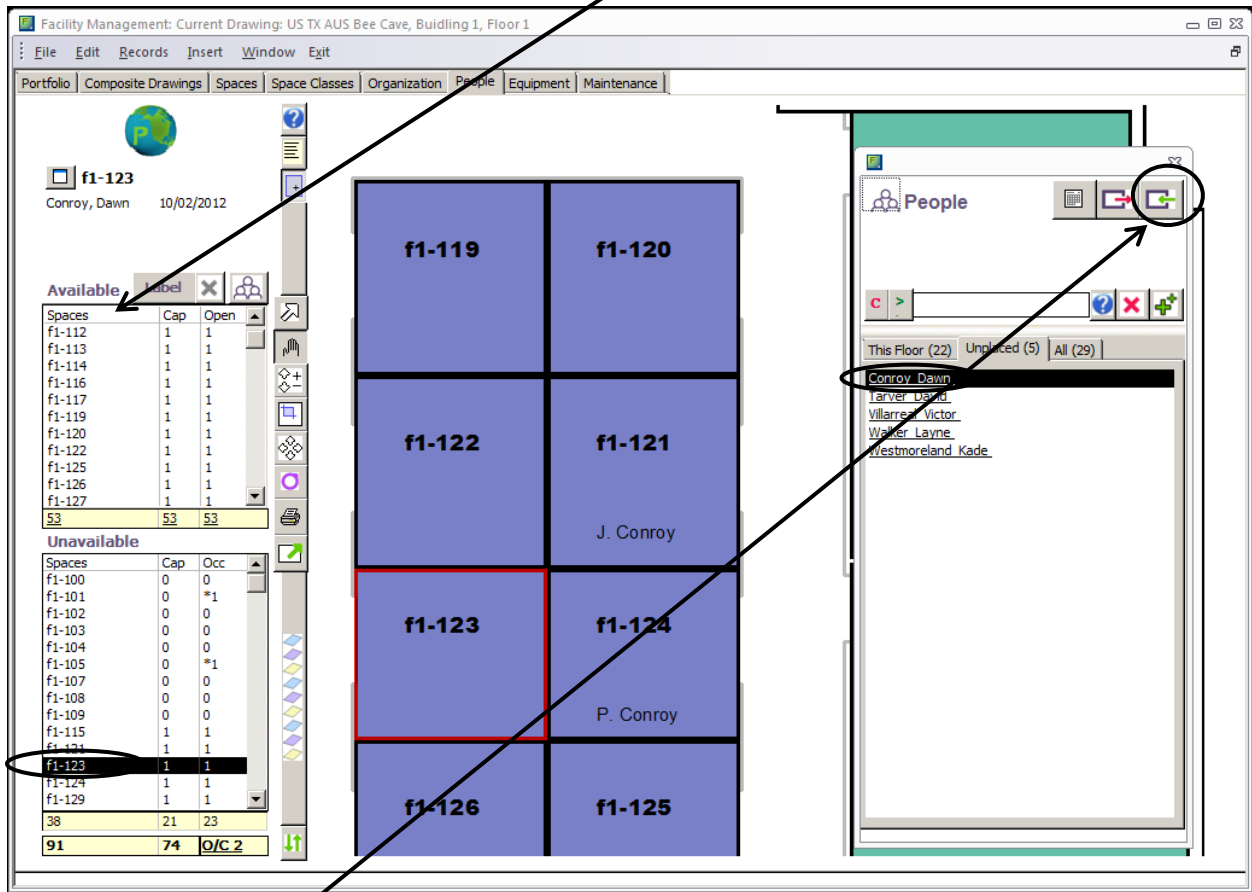
This move out is complete. We will now move this person into a new space – f1-123.



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Move an Individual Into a Space

1. **Select** the individuals name from the appropriate tab in the People list. In this instance, we are selecting a person from the Unplaced tab.
2. We wish to move this person into F1-123. **Highlight** that space in the list of available spaces.



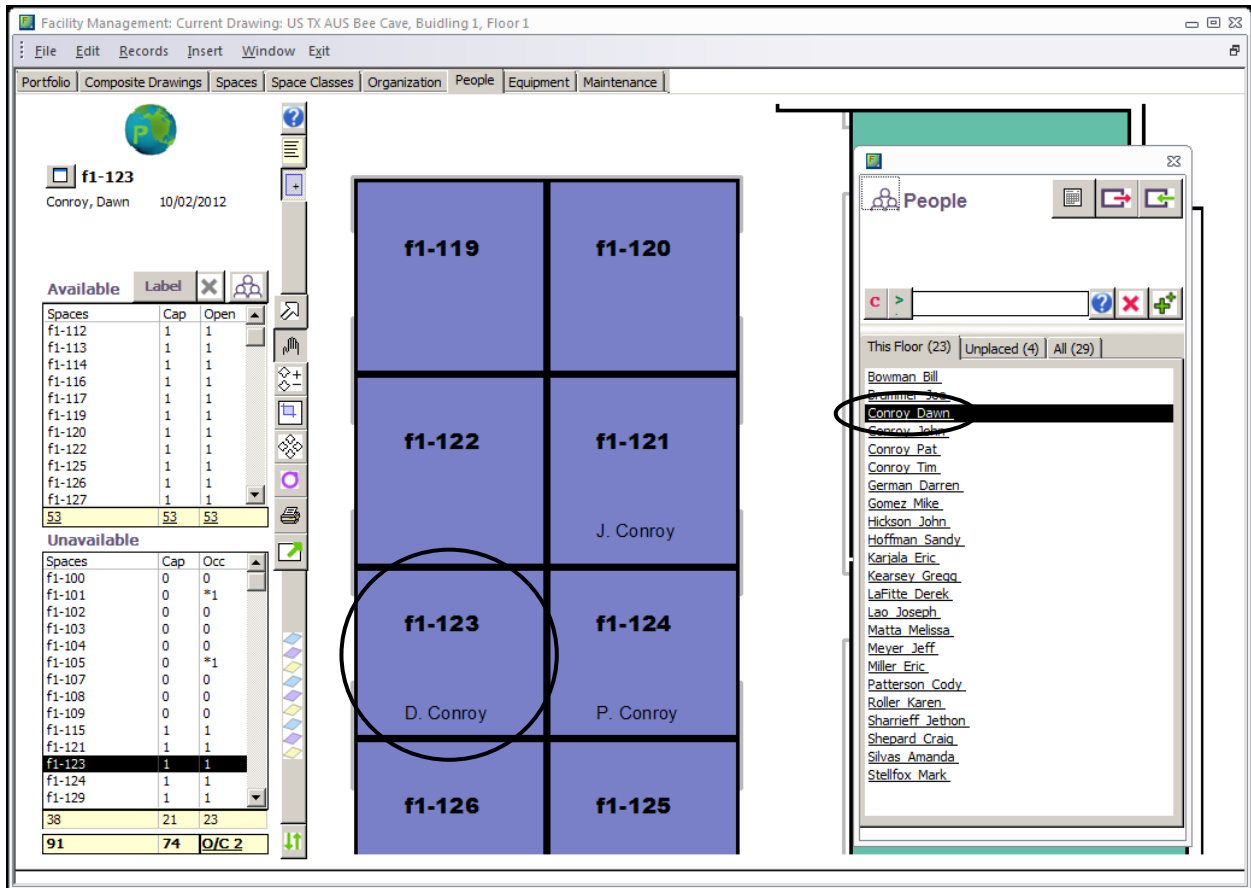
3. Click the **Move In** button. The Move In button contains a green arrow.

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4. **Refresh** your people Labels by clicking on the Label button.

You should now see that the person has been moved from the Unplaced tab to the This Floor tab. They will also now appear labeled in the space you have moved them into.



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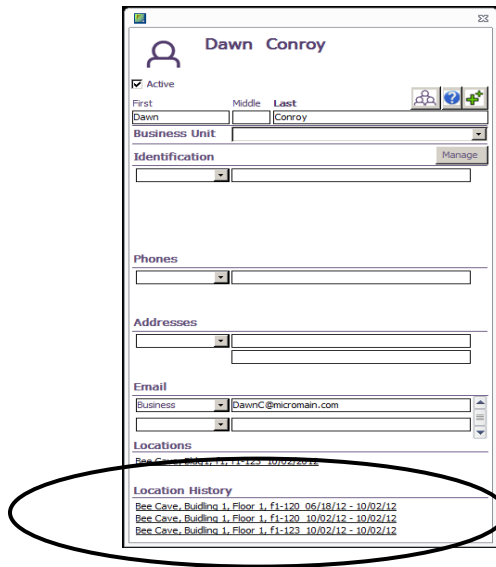
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Move History

You can access the move history of any individual in your database.

1. Select the **People** tab.
2. Open the **People List** by selecting the People List button
3. **Double click** a desired person's name in the People List to access the People form, as shown below:



The Location History is circled above.

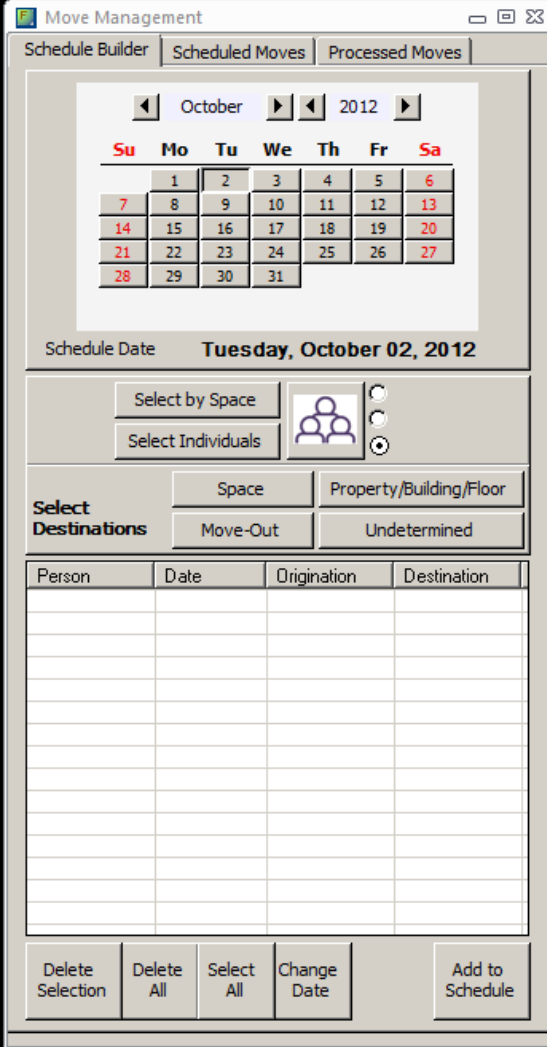
Scheduled Moves

Now that we have covered the features and processes involved in processing individual moves, we will cover scheduled moves.

1. Select the **People** tab.
2. Open the **People List** by selecting the People List button
3. Select the **Move Management** button on the People List to open the Schedule Builder.



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The screenshot shows the 'Move Management' application window with three tabs: 'Schedule Builder', 'Scheduled Moves', and 'Processed Moves'. The 'Schedule Builder' tab is active, displaying a calendar for October 2012. Below the calendar, the 'Schedule Date' is set to 'Tuesday, October 02, 2012'. There are two selection buttons: 'Select by Space' and 'Select Individuals'. Below these are two radio buttons. Further down, there are two columns of buttons: 'Space' and 'Property/Building/Floor', and 'Move-Out' and 'Undetermined'. At the bottom of the window, there is a table with columns for 'Person', 'Date', 'Origination', and 'Destination'. Below the table are five buttons: 'Delete Selection', 'Delete All', 'Select All', 'Change Date', and 'Add to Schedule'.

4. Use the Move Management form to begin building a schedule for moves. In this example, we will schedule the relocation of three people. We will work from left to right across the three tabs at the top of the **Move Management** form to complete a three step process:
 - a) Build the schedule (date, origin, destination) – **Schedule Builder** tab
 - b) Edit status of move (complete moves out and in) – **Scheduled Moves** tab
 - c) View all processed moves (individual and scheduled) – **Processed Moves** tab

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Move Management [minimize] [maximize] [close]

Schedule Builder Scheduled Moves Processed Moves

October 2012

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Schedule Date **Tuesday, October 02, 2012**

Select People
Select by Space
Select Individuals

Move-In Only
 Move-Out Only
 Relocate

Select Destinations
Space Property/Building/Floor
Move-Out Undetermined

Person	Date	Origination	Destination

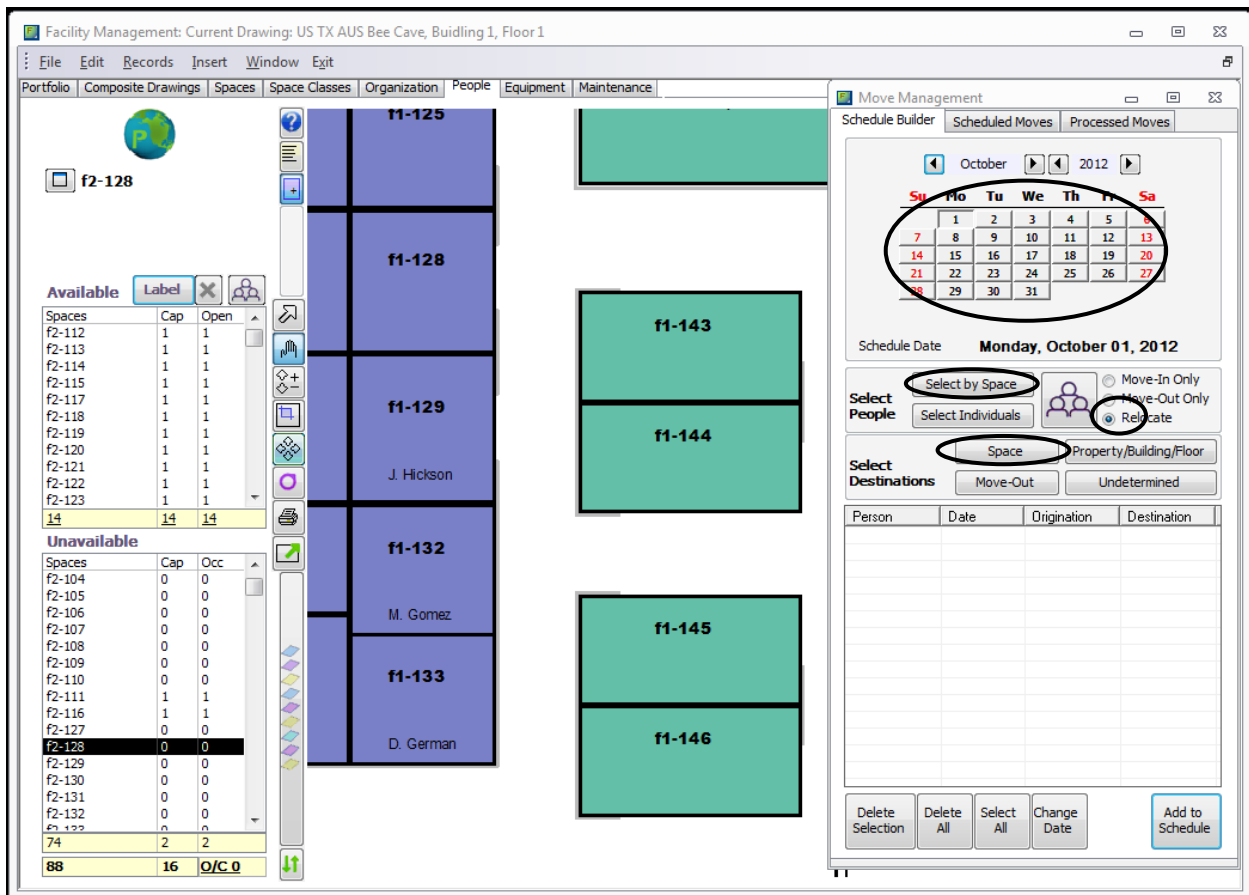
Delete Selection Delete All Select All Change Date Add to Schedule



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5. **Build the Schedule** – In the Scheduler Builder tab of the Move Management form, we will now begin building our relocation for a set of three individuals located currently in f1-129, f1-132 and f1-133. We will use the buttons of this form to:

- a) Select the date of our Relocation (today's date)
- b) Select our People to move by *Space* (rather than by *Individual*)
- c) Select the Relocate radio button (as opposed to move-in only or move-out only)
- d) Select Destinations for the move ins (by space)
- e) Build the schedule



For ease of example, we are going to move the occupants of f1-129, f1-132 and f1-133 across the hall to f1-144, f1-145 and f1-146.

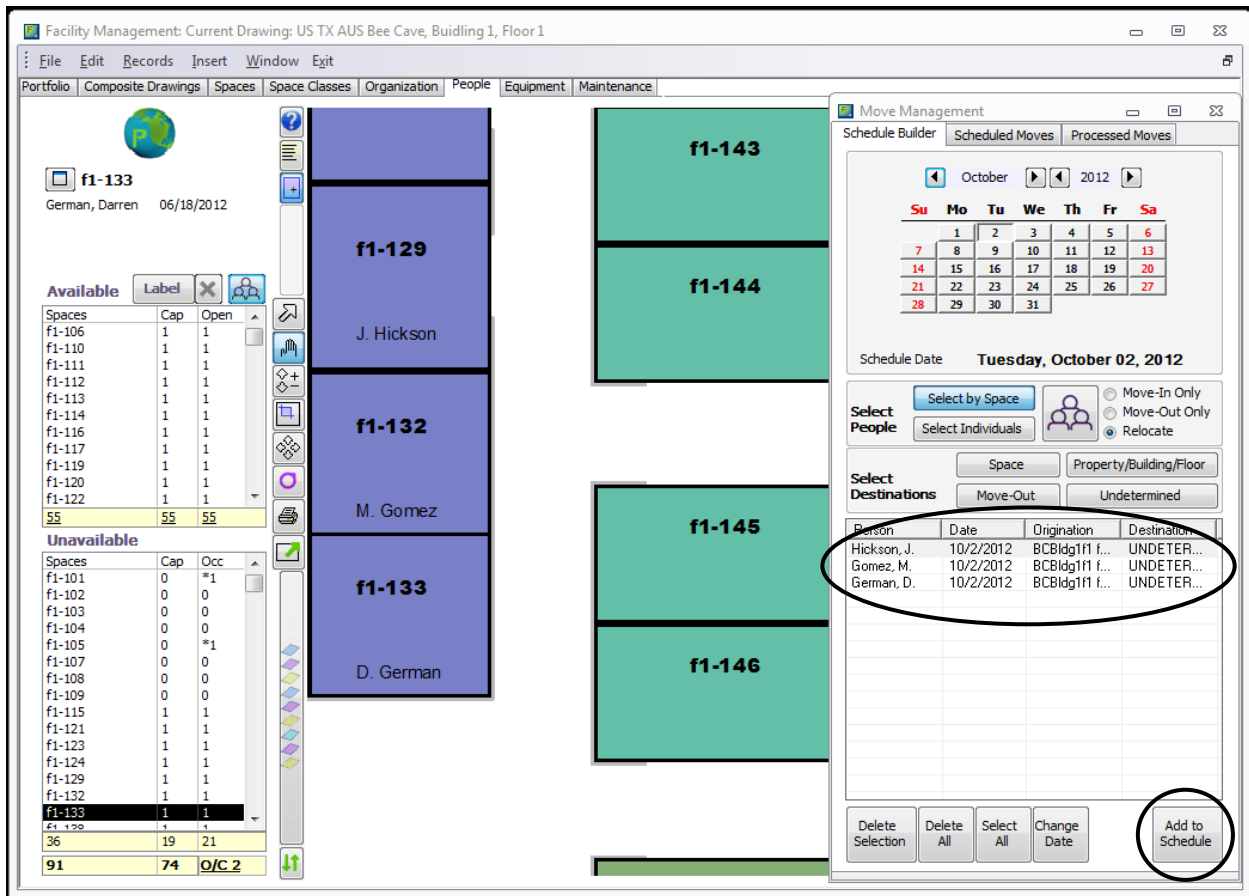
6. **Select** the appropriate date of the move within the calendar. We will use today's date for this example.

FM Move Management

FM Move Management

7. Click on the **Select by Space** button
8. Click the **Relocate** radio button.
9. Begin selecting and scheduling the three moves by *sequentially clicking on the space labels* within the drawing.

With each of the three spaces selected for move out, the Schedule Builder should now appear similar to the image below, with three people selected for moves, a date assigned, an origination point and an *UNDETERMINED* destination.



10. Select your destinations by *Space* by highlighting an individual and then clicking on the *space label* for the destination you wish to assign them to.

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Once this is completed, your Schedule Builder tab will look something like this:

Select Destinations	<input checked="" type="button" value="Space"/>	<input type="button" value="Property/Building/Floor"/>	
	<input type="button" value="Move-Out"/>	<input type="button" value="Undetermined"/>	
Person	Date	Origination	Destination
Hickson, J.	10/2/2012	BCBldg1f1 f...	BCBldg1f1 f...
Gomez, M.	10/2/2012	BCBldg1f1 f...	BCBldg1f1 f...
German, D.	10/2/2012	BCBldg1f1 f...	BCBldg1f1 f...

You can see here that we were selecting by *Space*, and that each person now has an assigned destination. At this point, your moves are ready to be added to the schedule.

11. Click on the **Add to Schedule** button in the lower right corner of the Move Management form.





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Note on Alternative Processes:

In this example we have chosen one path among several options for steps 7 through 10.

In **Step 7**, we selected people by *Space* rather than by *Individual*. Either method will work. If you choose to select by Individual, you will need to select them by clicking on their space location at the top of their people form, similar to the method used in moving individuals out of spaces. This option allows for scheduling moves for people who are within your database, but not located on the floor you are working within.

In **Step 8**, we chose to process these moves as Relocates (move out accompanied by a move in) rather than as a Move Out only or Move in only. Your choice will depend on your needs.

In **Step 10**, we chose in this example to select the destination by *Space*. Other options are available, including selecting by Property/Building/Floor (useful for moving individuals to other campuses), or Undetermined. Again, your choice will depend upon what you need to accomplish.

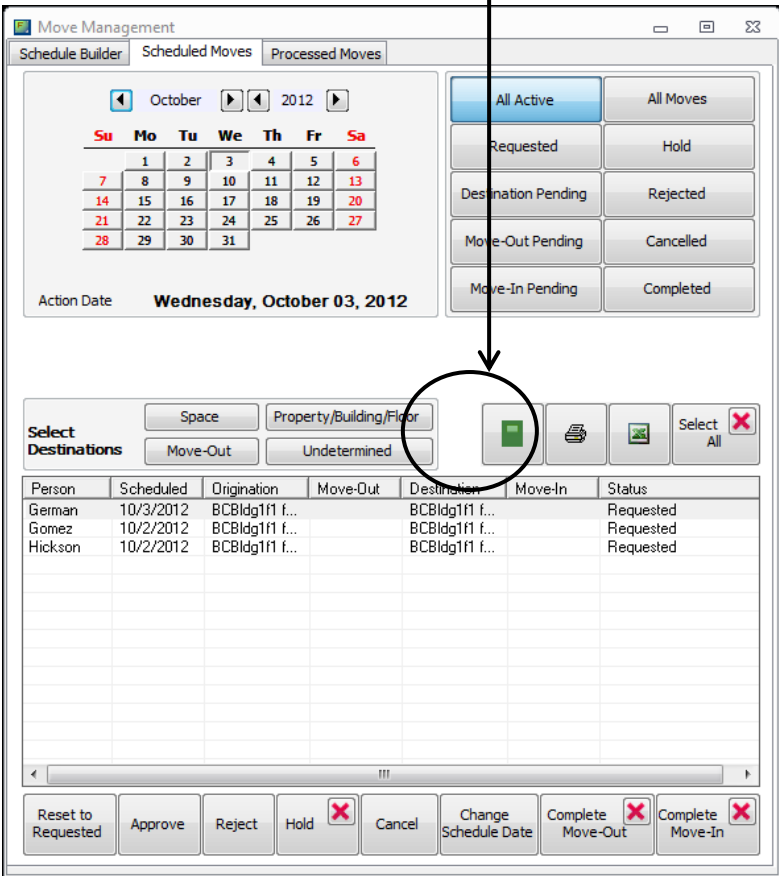
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Editing Move Status and Completing Move

Now that we have added our three moves to a schedule, you can perform a number of functions:

- a) Change the scheduled date for moves (individually or in groups)
- b) Sort the scheduled moves by status
- c) Produce Move Reports for view, print, or Excel export
- d) Change the status of the scheduled moves

For this example, we will maintain our scheduled date. Prior to move completion, however, you may wish to produce documentation of scheduled moves. This is done by clicking on the **Move Report** button in the central portion of the Scheduled Moves tab.



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Selecting the Move Report button provides you with a document outlining the Persons, Scheduled dates, Originations, and Destination of the scheduled moves.

Scheduled Moves

All Active Moves

Person	Scheduled	Origination	MoveOut	Destination	MoveIn	Status
German	10/3/2012	BCBldg1f1 f1-133		BCBldg1f1 f1-146		Requested
Gomez	10/2/2012	BCBldg1f1 f1-132		BCBldg1f1 f1-144		Requested
Hickson	10/2/2012	BCBldg1f1 f1-129		BCBldg1f1 f1-145		Requested

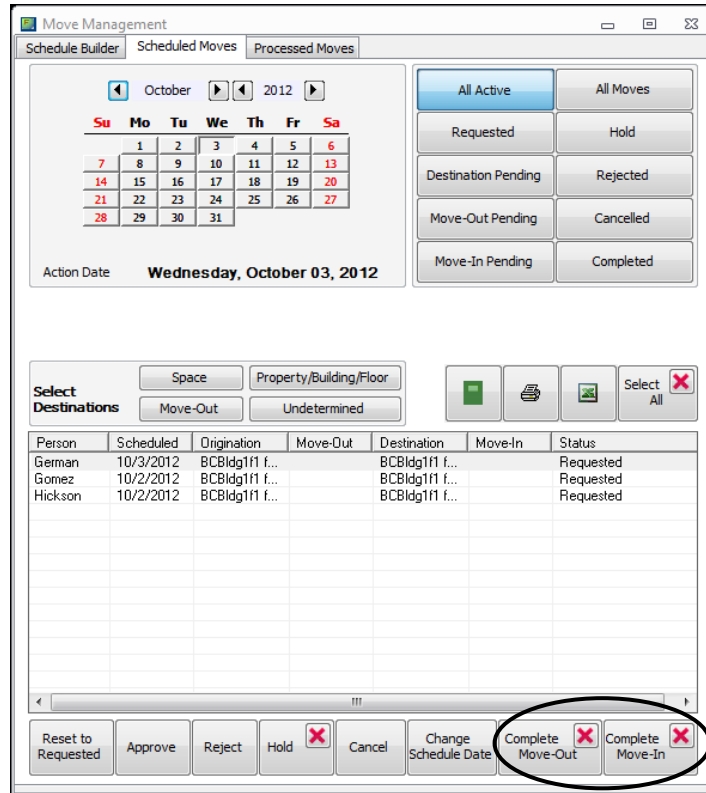
Total Moves 3

If you are not sorting scheduled moves by status (All, Requested, Hold, Rejected, Cancelled, Pending or Completed) or amending existing move statuses, you are ready to complete the moves.

This is done by **selecting** the moves you wish to edit (individually or with multiple selections) and then selecting the **Complete Move-In / Complete Move-out** button.



FM Move Management



Move Management
Schedule Builder | Scheduled Moves | **Processed Moves**

October 2012

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Action Date: **Wednesday, October 03, 2012**

Buttons: All Active, All Moves, Requested, Hold, Destination Pending, Rejected, Move-Out Pending, Cancelled, Move-In Pending, Completed

Select Destinations: Space, Property/Building/Floor, Move-Out, Undetermined, Select All

Person	Scheduled	Origination	Move-Out	Destination	Move-In	Status
German	10/3/2012	BCBldg1f1 f...		BCBldg1f1 f...		Requested
Gomez	10/2/2012	BCBldg1f1 f...		BCBldg1f1 f...		Requested
Hickson	10/2/2012	BCBldg1f1 f...		BCBldg1f1 f...		Requested

Buttons: Reset to Requested, Approve, Reject, Hold, Cancel, Change Schedule Date, **Complete Move-Out**, **Complete Move-In**

The **Processed Moves** tab of the Move Management form stores record of all the moves that have occurred within your FM system. This includes moves processed either individually and moves processes through the Schedule Builder.

CONTACT INFORMATION

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Note on Facility Space Data and BOMA Standards

The accuracy of the space data contained within your Facility Management database is dependent upon the quality and accuracy of the drawings imported into the application and the quality and accuracy of your data input.

Facility Management uses standards from The Building Owners and Managers Association (BOMA International). For extensive information on BOMA standard, please consult the BOMA website: www.boma.org