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FMDesktop – Scenario Planning

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Overview

FMDesktop does not contain a module for scenario planning. However, with a little foresight and creativity, you will be able to utilize the system for Scenario Planning.

Requirements

Because of the nature of this approaches illustrated below, the FMDesktop Access version is highly recommended.

If desired, the same steps can be worked with a SQL or Oracle implementation; however, those systems require more time (Database Loading, Configuration, Data Linking) than does the Access version. This document does not address SQL and Oracle intricacies.

Explanation

As defined in this document, a scenario is a potential arrangement of spaces or configuration of people, departments, etc. There are two methods that can be utilized for the scenario planning purposes:

   A. 1 floor plan is being modified at a time and will be its own scenario.

   B. Multiple floor plans, people, departments, etc. are being modified as part of a scenario.

In A above, the procedure will utilize 1 database with multiple scenarios (each floor plan will have a unique Property, Building, Floor, Drawing, DWF).

In B above, each scenario will have its own unique database.

In both instances, drawings can be migrated with relative ease. The drawings will contain the updated floor plan, but will also contain the space naming, square footage, etc. that will be utilized. The data (occupants, departments, etc.) however, requires some database manipulation and importation.

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Scenario Planning – Option A

Description

This scenario is designed for making modifications to a single floor plan. In this case, each scenario is fully contained within a floor plan.

Note: **THE FIRST 6 STEPS NEED TO ONLY BE PERFORMED ONCE.**
For each scenario, you'll use the same database.

Scenario Procedure

1. Create a new directory called "Scenario" in your FM Projects folder.

   Example: If you use K:\Common\FM\FM-LIVE as your current project folder, create a K:\Common\FM\Scenario directory.

2. Create a DWG folder under the Scenario directory.

   Example: K:\Common\FM\Scenario\DWG

3. Open Facility Manager (Access) and select **Data Link**.

4. In the Data Link dialog box, select the **New Blank Data Source** icon.

5. In the Select Data Source Location dialog box, browse to the Scenario directory.
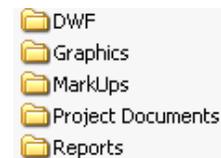
   Example: K:\Common\FM\Scenario

   Specify a file name for the new scenario database.

   Example: scenario.mdb

   Select **Save**.

   Back in the Data Link dialog box, select **Link**. This step will generate a grouping of folders in the scenario directory.

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6. Copy the drawing that you would like to modify into the DWG folder in the scenario directory.

   Example: If you are working on "Perry_Hall_1st_Flr.dwg" and want to create a scenario with spaces that might get re-arranged, you'd copy that file into the K:\Common\FM\Scenario\DWG folder. If there is already a file with the same name there, add a suffix to the file name (i.e. Perry_Hall_1st_Flr_A.dwg).

7. In Facility Manager, create a Property, Building, and Floor for the new floor plan.

   Think of a unique naming convention so that you know what this particular scenario means. A recommended approach is to use a date (maybe a year and month) as well as what this item may be.

   Before you bring the drawing in, you'll want to first establish the Property, Building, and Floor names. You may even find it beneficial to rename the drawing file to meet this same naming convention.

   Example: August 2009 Perry Hall Remodel Option A
   Property: 2009-08-PH-Rem-1-A-Prop
   Building: 2009-08-PH-Rem-1-A-Bldg
   Floor: 2009-08-PH-Rem-1-A-Flr

   Note: Since we are using every floor plan as its own scenario, you'll need a unique Property, Building, Floor, Drawing, and DWF file for each scenario.

8. Open AutoCAD and open the drawing file from the Scenario drawing folder.

   Select the Data Link icon [icon] and link to the Scenario database.

   Example: K:\Common\FM\Scenario\scenario.mdb

   Select the Drawing Log icon [icon] and log this drawing to the floor that was generated in step 7.

   Note: If this drawing has been used in a prior FMDesktop system (i.e. your live system), you will likely receive a prompt that states that a number of records have been found, would you like to reconnect. If you receive this message and want to get started with the current spaces, select YES.

   If you do not wish to use any of the previous record information, select NO. This will Flatten the drawing file (removes the XDATA associated with the polylines) and makes the drawing file just a plain CAD file.

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Using the Scenario in the Live System

You can now work on the drawing making modifications and saving them as a scenario. The drawing can be queried for data as you see fit.

When you decide that this particular configuration is the one that you would like to use with your live system, you'll need to do the following:

1. Make a note of any spaces that are no longer going to be utilized in that floor plan.

2. In the Live system (use Data Link in Facility Manager to connect to the Live system's database), you'll need to delete the spaces that are no longer being used.

    Note: If there are spaces in the Live system that are still being used in the scenario, you'll be able to "link" the new space configuration (CAD file) to the existing data information (database).

    Example 1: Space PH-101 is in the Live System and is listed as a Conference Room allocated to the Biology department. Space PH-101 also exists in the Scenario system (where we have not modified data … just the configuration of the space). You do NOT need to delete PH-101 from the live system.

    Example 2: Space PH-117 is in the Live System, but is no longer in the Scenario system. In this case, you'll delete the record (the database record) from the Live system.

3. Make a backup copy of the floor plan drawing file (.dwg) from the live system if desired.

4. Copy the drawing file from the scenario system to the Live system's drawing folder.

5. Open AutoCAD. Open the drawing (from the live folder now).

6. Select the Data Link icon ![icon] and link to the Live system's database.

7. Select the Drawing Log icon ![icon] and log the drawing into the existing floor plan.

    Note: You will receive a warning that a drawing already exists, do you want to overwrite. Answer YES. You may also then receive a notice that there are a number of disconnected spaces. You'll reconnect the spaces, so select YES there.

Results

You can now work with the new drawing file just as you would with the live system data. The CAD file is now connected to the data.

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Scenario Planning – Option B

Description

This scenario is designed for making modifications to multiple floor plans, occupants, equipment, etc. In this case, each scenario is fully contained within a new database.

Note: **THESE STEPS NEED TO BE PERFORMED FOR EACH SCENARIO.** For each scenario, you'll use a new database.

Procedure

1. Create a new directory called "Scenario-A" in your FM Projects folder.

    Example: If you use K:\Common\FM\FM-LIVE as your current project folder, create a K:\Common\FM\Scenario-A directory.

    Make a complete copy of all of the files and folders in the FM-LIVE directory and place them in the Scenario-A directory.

    Note: Since we are using the same data that may be reconfigured in some manner, we need to replicate the existing system (which contains the occupants, cost centers, equipment, etc.)

    Note: Each Scenario will have its own unique directory (i.e. Scenario-A, Scenario-2009-08, etc.). In this case, a scenario can involve multiple drawings, multiple cost centers, etc.

2. Create a DWG folder under the Scenario directory and copy all drawings that will be utilized into this directory.

    Example: K:\Common\FM\Scenario\DWG

3. Open Facility Manager (Access) and select **Data Link**.

4. In the Data Link dialog box, select the **Find Data Source** icon.

5. In the Select Data Source Location dialog box, browse to the Scenario's directory.

    Example: K:\Common\FM\Scenario-A

    Select the access database that is located there (it will have a .mdb extension).

    Select **Open**.

    Back in the Data Link dialog box, give a new name to this link (this step is NOT renaming the
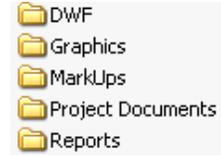
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file, rather simply renaming what you'd like to refer to this file as). It is recommended to use the scenario name or identifier here.

Select **Link**. This step will link to the scenario.

```
DWF
Graphics
MarkUps
Project Documents
Reports
```

6. **THIS STEP IS VERY IMPORTANT!**

In step 2, you copied the drawing files that will be used in this scenario to the DWG directory under the scenario name. You must open EACH drawing file (in AutoCAD) that is in that directory and do the following:

1. Make sure the Data Link in AutoCAD is pointing to the Scenario's database.
2. Log the drawing file (even though it will likely already appear to be logged) into the database.
3. Republish the Plan View.

These steps ensure that the drawing with which you will now be working is connected to the proper database.

Results

You may now work with the scenario moving people, equipment, changing the space configuration, etc.

When you are ready to bring the scenario into the Live System, you'll need a systems integrator to bring that data together.

In the steps above, the drawings and actual database data may have been modified. Bringing the drawing over (as in Option A) is not feasible as more data than drawings have likely been modified.

Contact Jon Luby (603.488.1628) to perform these steps.