

FACET™ Quick Start Guide

Thank you for your interest in **FACET**

If you are like most people, it is the first step after installing new software that is the hardest.

Where do I start?

This document has been specifically designed to get you up and going on that learning curve. It will step you through a typical move process and allow you to experience many of the features of **FACET**.

Please print this document and have it by your side as you start **FACET** for the first time.

This Quick Start scenario will take less than 15 minutes and can be paused at any time, so, lock the door, put your phone on do-not-disturb and experience what work could be like with **FACET**.

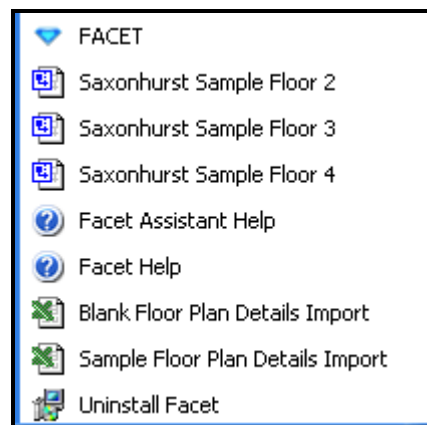
Notes about FACET

FACET has built-in help on most screens called ScenarioHelp™. Its purpose is to guide you through the steps available on each screen. To get started however you have 4 choices of where to start.

You can view one of the three floor plans and institute a move from there, this requires some degree of familiarity with **FACET** or you can start by using the database. We recommend the database until you become more familiar.

Starting Quick Start Scenario

After installing the product you'll notice several menu options have been added to your start menu. This guide explains where to begin and will guide you through a sample move. The **FACET** menu looks like this:



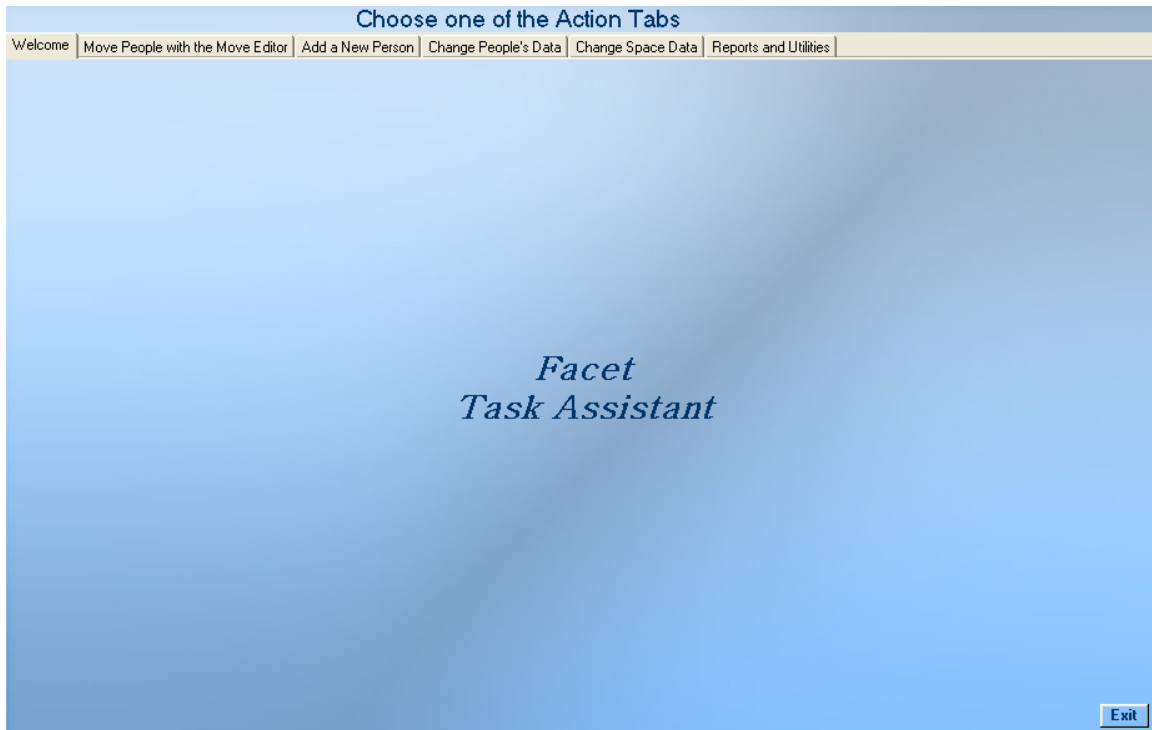
The items you will be interested in are the first two items, **FACET**, and the **Saxonhurst Sample Floor 2**.

There are many features FACET adds to VISIO® to aid in drawing preparation but most of the functions are contained in the database tool, **FACET**.

Click on the **FACET** icon in the start menu to activate **FACET**. A splash screen will appear as the software initializes. Note in the lower right hand corner of the splash screen the number of days remaining for your evaluation period.



After the splash screen, you are presented with the Welcome Form.



The welcome form has six action tabs you can select to perform various activities:

- Welcome – This present view
- Move People with the Move Editor – This tab takes you to the **FACET** move process where you can quickly create, modify and print information related to a move. *This is the tab we will be using for our Quick Start move process.*
- Add a New Person – This tab is used to add people to the database.
- Change People's Data – This tab is used to change information related to a person or a persons requirements and also delete people from the database.
- Change Space Data – This tab is used to change the information related to a location, termed space attributes (office, cubicle, etc.).
- Reports and Utilities – This tab is used to maintain information in the database such as space characteristics and asset information. There are also a number of reports available the can be selected from this tab.

In addition, there is an **Exit** button in the lower right had corner to close **FACET**.

A Sample Move Scenario

Saxonhurst Group Incorporated has hired a new Director of IT, Jim Ferguson, to manage its ever growing IT requirements. One of the operational problems with IT was that it was spread out geographically. It was felt by senior management that consolidating the department would improve efficiency. You received an email with the instructions to move the IT department's current staff:

Name	Old location	New location
Jim Ferguson	New hire	2008
Dick Dinehart	2029d	2014e
Wendell Hasagawa	2040f	2013d
Matt Johnson	2029c	2014f
Ralph Larson	2040g	2014b
Ron Nichols-Healey	2037	2006
Jim Rue	2040e	2013e
Sean Ueland	2047	2007
Ernie Williamson	2040c	2014a
Jack Yunt	2040d	2014c

This move to take effects in 2 days.

Since you already have FACET running on your PC you click on the Move People with the Move Editor tab to start a move.

With this particular move there is a new hire involved so click on **I Want to Add People** button. **FACET** switches you to the Add a New Person tab temporarily so you can add a new person.

You fill in the fields on this form with the pertinent information; Last Name, First Name, Start Date, Department and Title. Remember, you can come back at a later time and fill in any missing information like the email address etc.

Notice the Department field is a drop down list so you can choose from the list.

When all the fields are filled, click on **Click Here to Add This Person** button. You'll get a dialog box letting you know the person has been added.

For the move editor to help you in locating assets, you need to specify the requirement for Jim Ferguson. We know because he's a Director, he is allocated a desk with a return, and office chair, a 3' round table with two visitor chairs.

Click on **Now Add Occupant Requirements** button. This makes the right half of the form available for entry. In the Asset Requirements section, use the drop down list to identify the items he needs to work.

Each time you select an item it automatically assumes only 1 is needed, you will need to use your mouse to click on the quantity of 1 next to *Visitor Chair, Dark Blue* and change it to 2. When you are finished, it should look like this:

Asset Requirements		
Quantity	Description	Class
1	6' Desk, Dark grey	Desk
1	6' Return, Dark Grey	Desk Return
1	Desk Chair, 3 Adj. Dark Blue	Chair
1	3' Round Meeting Table, Maple	Table
2	Visitor Chair, Dark Blue	Guest Chair
*	1	

Jim Ferguson also has Communication Requirements, a telephone and a network connection. In our example we use PBX for the phone connection and TCP/IP for the network connection.

Communication Requirements	
Quantity	Description
1	PBX
1	TCP/IP

You will leave the printer section blank at this time because we don't know what his printing requirements will be.

Having filled out the complete form you can now click the **Finished with This Person** button, which resets the screen for another person. Since you are now finished adding people, you can take the next step in the move process by clicking **Click Here** button.

FACET switches you back to **Move Editor** where you will notice you are now in step 2. Fill in the Move Description and Date fields with 'Relocate the IT department' and the move date. Now take the next step by clicking on **Take the Next Move Step** button.

You can identify one or more move supervisors or coordinators for the move. **FACET** will accept any name and phone number. Previously entered information can be taken from the drop down list. This information is optional. When you are ready; **Take the Next Move Step**.

At this point you are going to add the 9 people who are moving. Take the list of people above and enter them one at a time into the move. Click on the drop down list to show a list of people available for movement. You will note that Jim Ferguson shows at the top of the list because he currently has no assigned space, since he's new. For each person, choose the person to Add and Choose a location to move the person into; then click the **Add to List** button. When you are finished, click the **Click Here** button.

You are now ready to generate the Asset Transfers. **FACET** will now look at the participants in the move and compare their requirements with the assets allocated to their current location and the assets allocated to their new location. If any assets are lacking in the new locations, **FACET** will tell you what needs to be moved to the new location.

If excess assets are in the new location, **FACET** will tell you where they can be stored. If there are requirements and assets that are lacking, **FACET** will find the unused asset, listed from nearest to furthest away or recommend a purchase if no assets can be located.

Click the **Take the Next Step** button. After the Generation Process you are switched to the Review Asset Transfers tab. You can look at the results of the move and override where necessary the decisions made by **FACET**. Here's an example of Jim Ferguson's move:

Asset Dispositions					
	Description	Class	Quantity	Disposition	From/To
▶	6' Desk, Dark grey	Desk	1	Leave in New Location	
	6' Return, Dark Grey	Desk Return	1	Leave in New Location	
	Desk Chair, 3 Adj. Dark	Chair	1	Leave in New Location	
	3' Round Meeting Table	Table	1	From Storage to New Location	2011
	Visitor Chair, Dark Blue	Guest Chair	1	Leave in New Location	
	Visitor Chair, Dark Blue	Guest Chair	1	From Storage to New Location	2015
	2 Draw File Cabinet, Bla	File cabinet	1	From New Location to Storage	Storage

Notice that the office already contains a Desk, Return, Desk Chair, and one Visitor chair. A round table was needed. **FACET** found an unused round table in a vacant office, 2011, but that's a conference room table, therefore you will need to order a new one for this move.

Use the Disposition drop down list to change the disposition to say *Needs to be Purchased*. It will now show on the purchasing requirements report. Another needed Visitor chair can be taken from office 2015. In addition, the unneeded file cabinet will be moved to storage as part of the move. Your changes will make the form look like this:

Asset Dispositions				
Description	Class	Quantity	Disposition	From/To
▶ 6' Desk, Dark grey	Desk	1	Leave in New Location	
6' Return, Dark Grey	Desk Return	1	Leave in New Location	
Desk Chair, 3 Adj. Dark	Chair	1	Leave in New Location	
3' Round Meeting Table	Table	1	Needs to be Purchased	
Visitor Chair, Dark Blue	Guest Chair	1	Leave in New Location	
Visitor Chair, Dark Blue	Guest Chair	1	From Storage to New Location	2015
2 Draw File Cabinet, Blz	File cabinet	1	From New Location to Storage	Storage

You can review the rest of the move participants by clicking on the selector next to their names.

The selector is indicated by the small arrowhead to the left of the Move Participant's name.

Move Participants		
Name	From Location	To Location
▶ Jim Ferguson	Unassigned	2008
Dick Dinehart	2029d	2014e
Wendell Hasagawa	2040f	2013d
Matt Johnson	2029c	2014f
Ralph Larson	2040g	2014b
Ron Nichols-Healey	2037	2006
Jim Rue	2040e	2013e

Record: 1 of 10

As each person is selected, their requirements, and the actions recommended to take will show on the form. When you are finished with this review, click the **Click Here** button. You are almost finished.

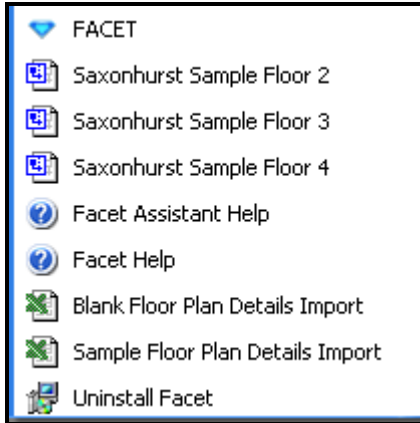
You are now ready to preview and print your move reports. Click on **Preview Printed Reports** button to create all the move reports:

1. Notification to Human Resources
2. Preliminary Network and Telephone Summary –Lists the source and destination of wiring connection changes for the telecommunications technicians.
3. Mover Summary – Lists each participant in the move and the assets that need relocation.
4. Notice to Reception – Lets the front desk know who has relocated.

5. Purchasing Summary – Lets the purchasing department know what new assets need to be purchased.
6. Packing Labels – pre-printed sheets of 10 labels for each participant’s boxes.
7. Move Packet – One sheet per participant showing the layout of the new office and the assets to be located in the office, so the participant can sketch the position of furniture and equipment. The move planners and movers use these forms to put each office in order.
8. Mail Delivery Changes – Lists the current mail stops of each participant.

CONGRATULATIONS you have developed a comprehensive plan and now you are ready to conduct the move!

Click **Take the Next Step** button. At this point you will be conducting the physical move. Click **Suspend this move and begin another one**. You can pick up where you’ve left off at any time by picking a move from the **Open a previously suspended move** list box. Just click the move you want to work with and **FACET** will reposition you at the point you left off.

<p>Now let’s take a look at the move you’ve built on the floor plan for the second floor.</p> <p>Go back to the Start menu of your PC and navigate back to the FACET menu. This time click on the <i>Saxonhurst Sample Floor 2</i>. This will launch VISIO and load the floor plan.</p>	
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After VISIO loads the document, **FACET** will start up and load its extensions to VISIO.

You will notice a tool bar specific to **FACET**. 

For this demonstration we will be using the View Moves in Progress tool. It’s the fourth button on the toolbar, (the magnifying glass with the stick man). But first let’s look at the area of the office we were planning in the move. You should be looking at the upper left hand corner of the floor plan when the document is opened. Use the vertical and horizontal scroll bars, position the floor plan in the lower left corner of the office.

You’ll notice that offices 2006, 2007, and 2008 are vacant. You can tell this because there are no names associated with the offices and the office numbers are shaded in gray

indicating they are unallocated. This is also true of cubicle group 2014a through f. You can see the impact a move has on a floor plan by using the View Moves in Progress tool.

Click on the button to open the **Moves in Progress** dialog box. You'll see the move you just created in the move selection box. Click on the check box next to the move ID to select the move. If you had more than one move you can select just the ones you want to see.

Now click the **Update Drawing** button. The drawing will move around as **FACET** locates offices and cubicles it needs to update to show the move(s). When **FACET** is finished, the dialog box will automatically close and be replaced by a **Moves Toolbar** dialog box.

You will notice that several names on the floor plan have a diagonal slash through them.

This indicates the person will be moved from that location. Now use the scroll bars to reposition back at the lower left corner of the floor plan. You will see that the previously vacant offices now contain the names of the move participants.

If you wanted to print out the floor plan showing only the effects of the move you could uncheck the Show All Occupants check box and show only those spaces involved in the move would be visible.

Close the **Moves Toolbar** dialog box by clicking on the close window button (red X). Now close VISIO. You will be asked if you want to save your changes. Respond No to preserve the original document.

After the physical move has taken place you may want to return to this move in the FACET database and make adjustments to the actual asset changes. For example, perhaps the decision was made on the spot to keep the file cabinet.

You can make these adjustments before the **closing the move** step by clicking on the Review Asset Transfers tab and making any adjustments.

Remember, until a move is closed, the assets are kept on hold for this move and will not be allocated to the destination locations, or available for other moves. This feature allows you to plan multiple moves and temporarily allocate assets to a move without changing the asset locations in the database. It also prevents you from allocating an asset to multiple moves or multiple locations.

Closing the move, transfers the assets and the people to the destinations in the move.

This concludes our Quick Start Scenario. Feel free to explore the **FACET** database and floor plans at your leisure. If you are convinced **FACET** can be an effective tool for your organization's move planning take the next step and contact Saxonhurst Group for a

quotation by sending an email to info@saxonhurst.com or calling 1.425.742.4167 and speak to a Facilities Professional.

Frequently Asked Questions (FAQ's):

- Q1. Some customers, especially those on a limited budget who are responsible for large floor plans often ask for a phased in approach to purchasing FACET.
- A1. Due to the variety of floor plan sizes and budget constraints, Saxonhurst has developed a methodology that allows for a planned phased in approach to achieving the total solution. Your Saxonhurst Facilities Professional can work with you on the most logical approach.
- Q2 How do I justify purchasing FACET as I am a cost center?
- A2. If you look at our web site, especially [the Purchasing page](#) you will see that we have created a cost and benefit justification template to assist you in your presentation and justification process.

Questions about Ordering FACET:

[How do I order FACET?](#)

[How much does it cost?](#)

[What are my payment options?](#)

[Do I have to convert my entire facility at the time of purchase?](#)

[How many licenses do I need to purchase?](#)

[Will you send me a CD or can I download FACET via the Web?](#)

[How do I get other questions answered?](#)

Questions about Ordering FACET:

How do I order FACET?

Simply call or email us with your requirements and we will discuss your plan and provide you with a quotation.

How much does it cost?

The price includes the importing of all of your data contained in electronic format provided at the time of purchase and the converting of 30,000 Rentable Square Feet (RSF) of your floor plans.

Additional RSF beyond the initial 30,000 RSF are charged at a nominal charge per RSF if your total floor plan is purchased at one time. This charge also includes all data importing and map conversions.

If, however, you choose to purchase additional RSF beyond the initial 30,000 over time, there is an additional flat fee for each order and a minimum invoice amount corresponding to additional order increments of up to 32,000 RSF.

To receive a quotation based on your specific requirements, please enter the information into the [Following form](#) .

Furthermore, providing you do not require custom programming, there are no implementation or set up charges. We are informed that some companies charge between 3 to 15 times the database fee to provide this service, which frequently involves on-site visits.

What are my payment options?

At the time that you receive your populated database and floor plans, you will also receive an invoice for **FACET**. Our terms are net 30 days.

Do I have to convert my entire facility at the time of purchase?

To get the maximum benefit of **FACET** you are encouraged to do a one-time conversion; however, budgetary constraints may prevent you from doing so. Therefore, our purchasing program provides for a phased-in purchasing plan at a nominal fee.

For example, if you have 130,000 RSF under your management, you may choose to purchase the database, which includes 30,000 RSF, and purchase the additional maps with data importing in the succeeding months or quarters in blocks of 50,000 RSF.

How many licenses do I need to purchase?

FACET comes with 5 user licenses. If additional licenses are required, please email sales@saxonhurst.com for information on purchasing a site license.

Will you send me a CD or can I download FACET via the Web?

You can either receive CD's or you can decide to download **FACET** from our secure FTP site. Remember that under current tax law, you may be able to

eliminate paying sales tax if you choose the download option. Please see your tax advisor for further clarification.