# CenterStone

**Release Notes** 

Version | 9.4.29

Date | September 2013

Manhattan Software Inc.

World Leading Real Estate, Asset

& Facilities Management Software

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## **CENTERSTONE 9.4.29 INTRODUCTION**

Manhattan Software Inc. is pleased to introduce new functionality and product enhancements for users with the release of CenterStone 9.4.29.

This Release Notes document includes:

- New Features
- General Enhancements
- Changes

## **NEW FEATURES**

## Indirect Cost Recovery (ICR) Tracking

Indirect Cost Recovery (ICR) is an enhancement to the CenterStone application that provides a means of tracking and verification of space-related, indirect costs associated with research grants and other contracts, and to enable production of the reports necessary for cost recovery.

See the "Indirect Cost Recovery (ICR) User Guide" for details and instructions on using the new functionality.

## Contacts Tab added to Building, Floor, Space, and Zone screens

You can now associate people in your HR database with a Building, Floor, Space, or Zone.

Navigation: Display any STRUCT UNITS  $\rightarrow$  Building, Floor, Space, or Zone tab  $\rightarrow$  Search button  $\rightarrow$  make a selection  $\rightarrow$  Contacts tab  $\rightarrow$  Assign button  $\rightarrow$  Search button  $\rightarrow$  Double-click a HR  $\rightarrow$  Select a Contact Type  $\rightarrow$  Close button

Figure 1: Contacts Tab

B B	Building: Dallas-elm site - Dallas elm bldg - As Built				
	ORD EDIT HELP 🔐 REF				?
AT	TRIBUTES BREAKDOWNS F	PICTURE FLOORS HUM	AN RESOURCES ASSETS	CONTACTS LEASING WORK O	RDERS DOCUMENTS
	Name	BU Name	Contact Type	Phone Number	Email
	Smith, Austin		HR		
		A	SSIGN REMOVE CL	DSE	

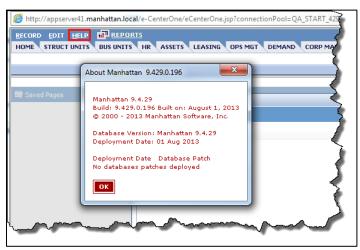
## **GENERAL ENHANCEMENTS**

## **Additional Information Displayed from Help Menu**

Users will now see build and patch details when they display the "About Manhattan" window from the Help system.

#### Navigation: **HELP** → **About Manhattan**

Figure 2: Help About displaying additional information



## Open a Zone, Space, or Measured Area without opening a Drawing

Users can now open a Zone, Space, or Measured Area without being required to display the associated drawing. This applies to opening a single Zone, multiple Zones, a single Space, multiple Spaces, a single Measured Area, and multiple Measured Areas.

#### **Zone Area**

Navigation: **STRUCT UNITS**  $\rightarrow$  **Zone**  $\rightarrow$  **Search**<sub>-</sub> $\rightarrow$  click a **Zone** to highlight it  $\rightarrow$  select **Information** from the menu

Clicking **Information** from the menu displays the highlighted Zone attributes without displaying the drawing.

Figure 3: Opening a Zone

	BUS UNIT		ASSETS LEASIN	NG OPS MGT DE	MAND	CORP MAP	SETUP	USER MGT		
Sites Buildings Floors	Zones	Spaces	Measured Areas	Virtual Move List	Moves	Move Sets	Supply	Scenarios	Space Planning	MAC
Information Drawing										
Load Search: - Det	fault Zon	e Search		CREAT	E CUSTO	M SEARCH				?
Search Filters										
Building Name:		[	<ul> <li>Floor Number</li> </ul>	en 🔄		Zone Nam	e:			
Portfolio:		[	•							
SEARCH CLEAR	SAVE	E FILTER S	SET SAVE SE	ARCH AS						
	-	Zone: B								×
ADD Zone DELETE Zo		ATTRIBUT			UDCER	SPACES C	ONTACTS	ASSETS		
Building		HIRIDUI	ES BUSINESS UN		JURCES	SPACES U	UNTACTS	Maaela	LEMSING WOR	
		Genera	al Information —							14
				Zone name:						
				Zone number:	В					
				Description						
				Zone type:			-			
				Floor Area Type: Tenant:	Not App	plicable				
				Tenant:						
		_ Measur	rements							
				Actual:	1452.9	SF	134.98	M <sup>2</sup>		Ŧ
4				АРР	Y CI	LOSE HEI	LP			
elected 89 records									<b>100%</b>	•

#### Space

Navigation: **STRUCT UNITS**  $\rightarrow$  **Spaces**  $\rightarrow$  **Search**<sub> $\rightarrow$ </sub> click a **Space** to highlight it  $\rightarrow$  select **Information** from the menu

Clicking **Information** from the menu displays the highlighted Space attributes without displaying the drawing.

Figure 4: Opening a Space

tes Buildings Floors Zone	es Spaces Measured Areas	Virtual Move List Moves	Move Sets Supply	Scenarios Space Planni	ng MA
formation Drawing					
oad Search: Default S	Space Search	▼ CREATE CUSTO	M SEARCH		?
Search Filters					
ldg. Name:	Floor Num	ber:	Zone Name:		
ocation Number:	Status:		Function:		-
/pe:	Bus Unit T	ype:	Bus Unit Nam	ne:	-
ortfolio:					×
SEARCH CLEAR	ഹ Space: 6				
	ATTRIBUTES BUS UNITS	HR ASSETS CONTACTS			S VEI
ADD Space DELETE Spa	General Information				
Building Na	General mormation	C			
		Space name: Space number: 6			
		Description			
		Capacity: 0			
		Occupancy: 0			
	Mark for S	pecial Allocation:			
		Is reservable:			
	- Units				_
	Conits				-     - I

#### **Measured Area**

Navigation: STRUCT UNITS  $\rightarrow$  Measured Areas  $\rightarrow$  Search  $\rightarrow$  click a Measured Area to highlight it  $\rightarrow$  select Information from the menu

Clicking **Information** from the menu displays the highlighted Measured Area attributes without displaying the drawing.

Figure 5: Opening a Measured Area

	REPORTS	
	Zones Spaces Measured Areas Virtual Move List Moves Move Sets Supply Scenarios Space Planning	MAC
Load Search: Defai	It Measured Area Se CREATE CUSTOM SEARCH	?
Search Filters		
Building Name:	Floor Number:	
Measured Area Type Name	Portfolio:	
SEARCH CLEAR	SAVE FILTER SET SAVE SEARCH AS	
	🙆 Measured Area:	x )
ADD Measured Area D		
Building I	ATTRIBUTES ASSETS LEASING WORK ORDERS DOCS	
	- General Information	л II
		1 1
	Area name:	
	Area number:	
	Description	
Dallas elm bldg	Measured Area type:	1 🛛
Dallas elm bldg	Floor Area Type:	
Dallas elm bldg Dallas elm bldg		
Dallas elm bldg		
Dallas elm bldg		
Dallas elm bldg	Space function:	
Dallas elm bldg	Space type:	-
Dallas elm bldg		- 🏢
•	APPLY CLOSE HELP	
elected 106 records		

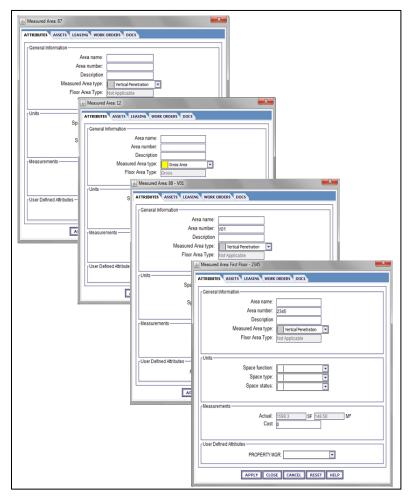
#### Multiple Zones, Spaces, or Measured Areas

Navigation: STRUCT UNITS  $\rightarrow$  Zone, Spaces, or Measured Areas  $\rightarrow$  Search\_ $\rightarrow$  highlight multiple items using the Crtl key or the Shift key  $\rightarrow$  select Information from the menu

**NOTE:** For Measured Areas, all areas must be from the same Portfolio.

Clicking **Information** from the menu displays the highlighted selections attributes in cascading order without displaying the drawings.

Figure 6: Opening Multiple Zones, Spaces, or Measured Areas



### **Report Enhancements**

#### Shared Space Report Classification and Color By Enhancement

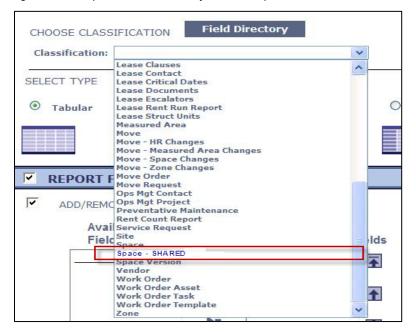
It is now possible for users to run a report to view information for multiple Business Units that share Spaces.

This enhancement has two parts:

- Space and Business Unit information can be combined into one Report Classification in Report Writer whenever a Space is being shared. It includes percentages of square feet and square meters by Business Unit on a Space and lists the multiple Business Units sharing a Space.
- Additionally, you can turn on the Business Unit layer on drawings and select either the "Group Equal" or "Group %" Color By to display all of the applicable Business Unit descriptions for each color in the shared Space.
- **NOTE:** To activate the Admin Setting "bu\_colorby\_include\_shared", the client must contact Manhattan Software (enter a support case). No system downtime is required to activate this setting.

#### Navigation: **Report** menu → Space - SHARED

Figure 7: New "Space - SHARED" classification in Report Writer



**NOTE:** No changes have been made to the existing Business Unit layer functionality, which displays the Business Unit description on drawings.

Refer to the following table for information regarding the new fields.

New Field	Source
Space Name	Space Classification
Space Number	Space Classification
Business Unit Name	Space Sharing Tab
Sharing Percent	Space Sharing Tab
Shared SF	Space Sharing Tab
Shared M2	Space Sharing Tab
Space Description	Space Classification
Planned Head Count	Space Classification
Actual Head Count	Space Classification
Space Function	Space Classification
Space Туре	Space Classification
Space Status	Space Classification

Table 1: New Shared Classification Fields

New Field	Source
Space Tenant	Space Classification
Space Grade Level	Space Classification
Space Sharing Type	Space Classification
Actual SF	Space Classification
Usable SF	Space Classification
Basic Rentable	Space Classification
Calculated Rentable	Space Classification
Lease Rentable	Space Classification
Portfolio	Space Classification
Building Name	Space Classification
Building Number	Space Classification
Site Name	Space Classification
Floor Number	Space Classification
Floor Name	Space Classification
Zone Name	Space Classification
Zone Actual SF	Space Classification
Building Address Street 1	Space Classification
Building Address Street 2	Space Classification
Building City	Space Classification
Building Country	Space Classification
Building State	Space Classification
Building Zip Code	Space Classification
Building Address Region	Space Classification
Business Unit Type	Business Unit Classification
Business Unit Parent	Business Unit Classification
Business Unit Color	Business Unit Classification
Business Unit GLCode	Business Unit Classification
Business Unit Description	Business Unit Classification
BU_L1 BU Name	Business Unit Classification
BU_L1 BU Number	Business Unit Classification

New Field	Source
BU_L1 BU Desc	Business Unit Classification
BU_L2 BU Name	Business Unit Classification
BU_L2 BU Number	Business Unit Classification
BU_L2 BU Desc	Business Unit Classification
BU_L3 BU Name	Business Unit Classification
BU_L3 BU Number	Business Unit Classification
BU_L3 BU Desc	Business Unit Classification
BU_L4 BU Name	Business Unit Classification
BU_L4 BU Number	Business Unit Classification
BU_L4 BU Desc	Business Unit Classification

#### **Combine Space Console and Measured Area Classifications (D05538)**

Previously, the Space Console and the Measured Area reports were separate reports. The information from both reports is required for a complete view of the Building and Floor. It was possible to create a "nested" report to combine the information; however this required extra effort by users.

The new **Space – Measured Area** report Classification has been developed that combines all fields within the Space Console Classification and Measured Area Classification into a new Classification that will include a more complete view of the Building and Floor.

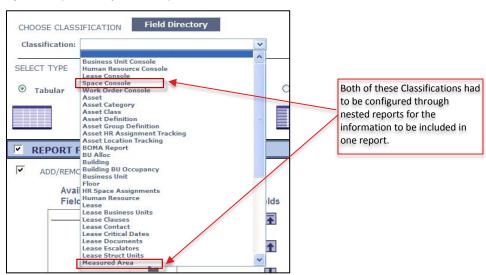


Figure 8: Report Classifications in previous versions

Figure 9: New Space – Measured Area report Classifications

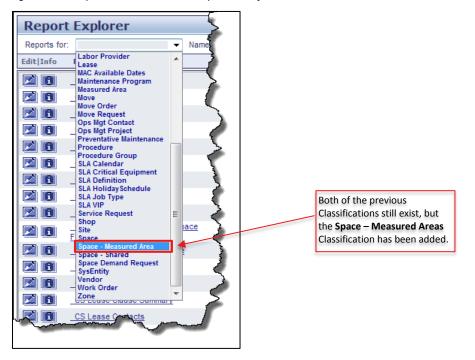


Table 2: New Space – Measured Area Classification Fields

New Field	Source
Space Name	Space Classification
Space Number	Space Classification
Space Description	Space Classification + Measured Area Classification
Planned Head Count	Space Classification
Actual Head Count	Space Classification
Marked For Special Allocation	Space Classification
Space Function	Space Classification + Measured Area Classification
Space Туре	Space Classification + Measured Area Classification
Space Status	Space Classification + Measured Area Classification
Space Tenant	Space Classification
Space Grade Level	Space Classification
Space Sharing Type	Space Classification
Actual SF	Space Classification + Measured Area Classification
Usable SF	Space Classification

Basic Rentable	Space Classification + Measured Area Classification
Calculated Rentable	Space Classification
Lease Rentable	Space Classification
Cost	Space Classification
HR Name	Space Classification
HR BU Name	Space Classification
HR BU Parent Name	Space Classification
Employee Number	Space Classification
Employee Type	Space Classification
Title	Space Classification
Mail Stop	Space Classification
Work Phone	Space Classification
Email	Space Classification
HR Grade Level	Space Classification
Hire Date	Space Classification
End Date	Space Classification
Asset Assign To	Space Classification
Asset Category	Space Classification
Asset Class	Space Classification
Asset Definition	Space Classification
Asset Part Number	Space Classification
Asset Name	Space Classification
Asset Manufacturer	Space Classification
Asset Description	Space Classification
Asset HxWxD	Space Classification
Asset Replacement Cost	Space Classification
Asset Serial Number	Space Classification
Asset Tracking Number	Space Classification
Asset Assignment Type	Space Classification
BU Sharing	Space Classification
Shared Percentage	Space Classification

Notes	Space Classification
Lease Name	Space Classification + Measured Area Classification
Work Order Number	Space Classification
Lease Is Covered	Space Classification
Work Order Name	Space Classification
Work Order Status	Space Classification
Work Order Priority	Space Classification
Work Order Category	Space Classification
Work Order Job Type	Space Classification
Work Order Created Date	Space Classification
Work Order Start Date	Space Classification
Work Order Completion Date	Space Classification
Work Order Assigned To	Space Classification
Work Order Requested By	Space Classification
Work Order Requested For	Space Classification
Work Order Task Count	Space Classification
Work Order Completed Task Count	Space Classification
Work Order Percent Complete	Space Classification
Work Order Campus	Space Classification
Document Name	Space Classification
Document File Name	Space Classification
Document Current Version	Space Classification
Document Read Only	Space Classification
Document Checked Out By	Space Classification
Document Checked Out By Date	Space Classification
Document Created By	Space Classification
Portfolio	Space Classification + Measured Area Classification
Building Name	Space Classification + Measured Area Classification
Building Number	Space Classification + Measured Area Classification
Site Name	Space Classification + Measured Area Classification
Floor Number	Space Classification + Measured Area Classification

Note NameSpace ClassificationZone NameSpace ClassificationZone Actual SFSpace ClassificationBuilding Address Street 1Space ClassificationBuilding Address Street 2Space ClassificationBuilding CitySpace Classification + Measured Area ClassificationBuilding CountrySpace Classification + Measured Area ClassificationBuilding StateSpace Classification + Measured Area ClassificationBuilding Zip CodeSpace Classification + Measured Area ClassificationBuilding Address RegionSpace Classification + Measured Area ClassificationMeasured Area NameMeasured Area ClassificationMeasured Area NameMeasured Area ClassificationDrawing NameMeasured Area ClassificationIs Archive PortfolioMeasured Area ClassificationIs Proposed PortfolioMeasured Area ClassificationSpace UDA NameMeasured Area ClassificationMeasured Area UDA NameMeasured Area Classification	Floor Name	Space Classification + Measured Area Classification
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Building StateSpace Classification + Measured Area ClassificationBuilding Zip CodeSpace Classification + Measured Area ClassificationBuilding Address RegionSpace Classification + Measured Area ClassificationMeasured Area NameMeasured Area ClassificationMeasured Area NumberMeasured Area ClassificationMeasured Area TypeMeasured Area ClassificationDrawing NameMeasured Area ClassificationIs Archive PortfolioMeasured Area ClassificationIs Proposed PortfolioMeasured Area ClassificationSpace UDA NameSpace Classification	Building City	Space Classification + Measured Area Classification
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Is Proposed Portfolio     Measured Area Classification       Space UDA Name     Space Classification	Drawing Name	Measured Area Classification
Space UDA Name     Space Classification	Is Archive Portfolio	Measured Area Classification
· · · · · · · · · · · · · · · · · · ·	Is Proposed Portfolio	Measured Area Classification
Measured Area UDA Name Measured Area Classification	Space UDA Name	Space Classification
	Measured Area UDA Name	Measured Area Classification

## **Display Business Unit Description for Shared Spaces**

The system has been enhanced to display the applicable Business Unit description for each color in a shared Space when either the **Group Equal** or **Group %** Color By is selected

#### Sharing set to "Group Equal" in Space attributes

As shown in the following figures, the Business Unit descriptions are displayed.

Navigation: STRUCT UNITS  $\rightarrow$  Spaces  $\rightarrow$  Search\_ $\rightarrow$  click a Space to highlight it  $\rightarrow$  select Information from the menu

Figure 10: Example of sharing set to "Group Equal" in current version



**NOTE:** The Business Unit layer displays the Business Unit description on the drawings, therefore if the Business Unit number is desired, that value needs to be in the Description field on each Business Unit record.

#### Sharing set to "Group %" in Space attributes

As shown in the following figures, the Business Unit descriptions are displayed.

In both previous and new versions, the amount of space shown in each color is reflected by the percentage of space each Business Unit occupies. For example, in space 1105D below, there are two Business Units: one with 75% of the space and the other with 25% of the space.

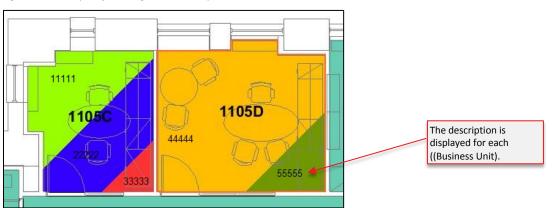


Figure 11: Example of sharing set to "Group %" in current version

## **Business Unit Console and Custom Search Enhancements**

Previously, when Business Unit Attributes were edited, it was not possible to identify who made the changes and when.

The Business Unit module now automatically displays two new fields on the Attributes screen, the Search screen, and Search Results screen. This enables users to see which user made changes to the

General Information section of the screen as well as the date/time the changes were made. This includes imported Business Unit records.

The two new fields are:

- User Modified By (user name)
- Last Modified Date (date and time)

**NOTE:** Which specific fields were changed and changes to the UDA section of the Attributes screen is not tracked by the new fields.

#### Navigation: **BUS UNITS** $\rightarrow$ **Search**<sub>-</sub> $\rightarrow$ select a Business Unit

Figure 12: Business Attributes screen showing new fields

RECORD EDIT HELP MI REPORTS ATTRIBUTES LOCATIONS HUMAN RESOURCES ASSETS SCENARI		
General Information		
*Business Unit Name:	Information Technology	
Description:		
Business Unit Number:	2.4	
*Business Unit Type:	Company	he two new fields are populated
Business Unit Parent:	<b>•</b>	utomatically after a user saves
Business Unit Color		hanges to the Attributes screen.
GL Codo:		
Last User Modified By:	user2.1	
Last Modified Date:	2013-05-14 13:09	
User Defined Attributes		1
BU description: 2 des	cription	

#### Creating a Custom Search that includes the two new fields

Whenever you create a Custom Search, the two new fields will be listed for you to select. You can include them in the Filters as well as the Search Results.

Figure 13: Creating a Custom Search that includes the two new fields

Filter Field Selection	<u>REPORTS</u>	Assigned				?
Drawing Name Floor Name Floor Number Last Modified Date Last User Modified By Parent Business Omit Portfolio Site Name UDA - BU allocation UDA - BU change2 UDA - BU code UDA - BU created UDA - BU current estimate	Solution     Solution     Solution     Solution     Solution     Solution     Move Up     Move Down	Order Search For 1 BusinessUnit 2 BusinessUnit	Display Name Last Modified Date Last User Modified By	Field Name Last Modified Date Last User Modified By	Control Type DateBox FreeFlowText	Or Equ Con
Filter Field Details Search for: Busi		Display Name:	*Contr	ol Type:	<b>•</b>	

Figure 14: Example of Search screen using the two new fields

CenterStone Record Edit Help TT REPORTS HOME STRUCT UNITS BUS UNITS HR ASSETS LEASING OPS MGT PI	ROJ MGT CORP MAP SETUP USER MGT	
Load Search: Test Set as D	Default EDIT CREATE CUSTOM SEARCH ?	as always, you can leave the learch Filters blank, however if ou want to narrow the search,
User Name contains Last Modified Date matches           SEARCH         CLEAR         SAVE FILTER SET         SAVE SEARCH AS           ADD Business Unit         DELETE Business Unit         SAVE RESULTS TO FILE         CRI	Late Chooser	ou can enter text for the User Jame and/or select a date for the ast Modified Date.
BUSINESS UNITS		

Figure 15: Example of Search Results screen using the two new fields

arch OUSTON Set as Def	EDIT CREATE CUSTOM SEARCH	]	
Last User Modified F	By contains user		
FILTER SET SAVE SEARCH AS			
	user2.1	by	
	user2.1	As always you can greate a	
2013-05-07 14:48	user2.1		
2013-05-07 14:48	user2.1	Create Report From Results	
	user2.1	button.	
2013-05-14 13:05	user2.2		
2013-05-14 13:11	user2.1		
	Last User Modified E FLTER SET SAVE SEARCH AS ADD Business Unit DELETE Business 2013-05-02 14:25 2013-05-02 14:25 2013-05-07 14:48 2013-05-07 14:48 2013-05-07 14:48 2013-05-07 14:51 2013-05-07 14:51 2013-05-07 14:59 2013-05-07 14:59 2013-05-07 14:59 2013-05-07 14:59 2013-05-07 14:59 2013-05-07 14:59 2013-05-07 14:59 2013-05-07 14:59 2013-05-07 14:59 2013-05-07 14:59 2013-05-14 13:05	ADD Business Unit         DELETE Business Unit         SAVE RESULTS TO FILE         CREATE R           ADD Business Unit         DELETE Business Unit         SAVE RESULTS TO FILE         CREATE R           2013-05-02 14:25         user2.1         2013-05-02 15:19         user2.1           2013-05-07 14:48         user2.1         2013-05-07 14:48         user2.1           2013-05-07 14:48         user2.1         2013-05-07 14:51         user2.1           2013-05-07 14:51         user2.1         2013-05-07 14:51         user2.1           2013-05-07 14:50         user2.1         2013-05-07 14:50         user2.1	Image: Contraining and the second

## Wrap Text (rather than truncate) on Floor Plan Legends

When viewing legends via "Legend on Plan" or "Legend at Edge", the text in Floor Plan Legend was limited to four inches in length. Now, this text will automatically wrap if it is longer than four inches.

This enhancement affects the way the screen displays the information as well as how it appears when printed.

Figure 16: Example of wrapped text of Building Name in current version



**NOTE:** When using "Legend at Edge", the wrapped text will not display on the screen or when printing its "image". When printing to a printer, the wrapped text is visible.

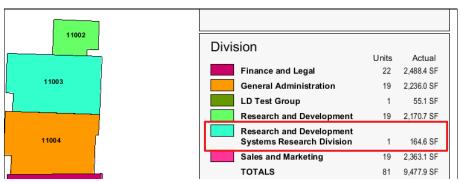


Figure 17: Example of wrapped text of Color By legend in current version

## Color By includes Additional data in Legend

Previously when users selected Color By, the totals included only areas that were accounted for in the Color By drop-down. Now, non-designated areas can be included, thereby allowing you to easily see the total gross square footage of a floor. By default, these legend options are turned off.

The non-polylined information is available for Division, Space Function, and Space Status views.

Navigation: Drawing from any object  $\rightarrow$  View  $\rightarrow$  Legend Properites

Figure 18: Turning on Optional Fields in Legend

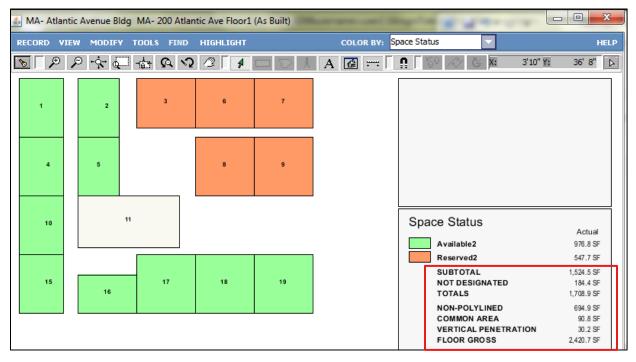
Legend Properties	ABH ABH		
_Orientation	Logo Location-	Optional Fields	
<ul> <li>Vertical</li> </ul>	⊙ Left	Totals	Select the <b>Totals</b> checkbox to
C Horizontal	C Center		nclude the sub total and non-
-Title Block	⊖ Right	Capacity Count	lesignated square footage.
<ul> <li>Default Layout</li> </ul>	Legend Width: 480 pixels	Vacancy Count	
C Custom Layout	Image Width: NONE	Cccupied SF	
		Uacant SF	
C Standard Layout	Table Dimensions	Actual SF	
Show Floor Number	Name Width: 3.0 in.	Usable SF	
Show Data Block	Table Width: 5.0 in.	Basic Rentable SF	
_Units	Columns: AUTO	Calculated Rentable SF	
SF ○ SF M <sup>2</sup>	Rows: 10 💌	Lease Rentable SF	
O M2 O M2 SF		Fully Loaded SF	
		Allocated SF	
		✓ Non-Polylined ✓ Common Area	
		✓ Common Area	
		Floor Gross	
	OK CANCEL		

#### The Floor information in Figure 19 would result in a Legend that looks like Figure 20.

Figure 19: Example of Floor information

	DRAWING <u>H</u> ELP 🚮 <u>REPORTS</u>				?
	NS DRAWING MGT SPACES HE	ASSETS CONTACTS LEASING	NOTES WORK OR		NTS
General Information		Measurements			
*Portfolio:	As Built	Floor Gross:	2420.7 SF	224.89	M²
Building:	MA- Atlantic Avenue Bldg 💌	Floor Rentable:	2390.4 SF	222.08	M²
*Floor Name:	MA- 200 Atlantic Ave Floo	Total Basic Rentable:	SF		M²
*Floor No.:	2.11	Total Calculated Rentable:	SF		M²
Drawing Name:	MA- 200 Atlantic Ave Floo		Do Full Building	Calculation	_
Floor Type:		Lease Rentable:	0.0 SF	0.00	M²
DWG Not Required			ProRated from E	Building Lease	
			Get from Lease	Module	
Current Capacity:	62	Total Usable:	2360.2 SF	219.27	M²
Current Occupancy:	0	Usable w/o Common:	2299.7 SF	213.65	M <sup>2</sup>
			Get Usable from	n Zones	
		Total Space Actual:	1708.9 SF	158.76	M²
		Default Space Rentable:	Lease Rentable	•	]

Figure 20: Example of new Legend



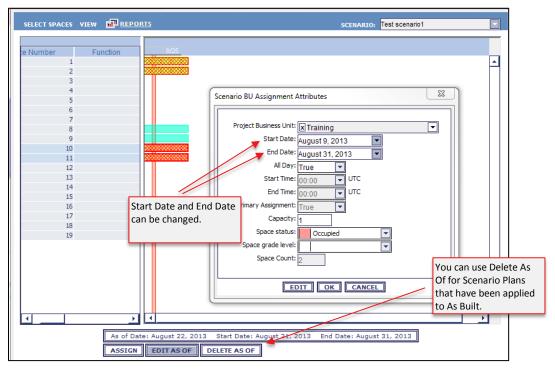
## **Scenario Planning**

This enhancement has three parts:

- The **End Date** of a Scenario Plan that has been applied to Softlock can be changed. The date must be within the Scenario date range.
- The **Start Date** of a Scenario Plan that has been applied to Softlock and As Built can be changed. The date must be within the Scenario date range.
- Delete As Of can be used to delete dates of a Scenario Plan that has been applied to Softlock and As Built. The date must be within the Scenario date range.

# Navigation: STRUC UNITS $\rightarrow$ Floors $\rightarrow$ Select a Floor $\rightarrow$ Scenario Planning button $\rightarrow$ Select Scenario Plan to modify





## **MAC Requests based on UDAs**

To support the approval of Move Requests based on a UDA, the **Move Request String UDA** must use the same name as the **Move Request Resource UDA** with the suffix "STR" added.

For example if the Move Request Resource UDA is "Approval Email", then the Move Request String UDA must be named "Approval Email STR" as shown in the following example.

Figure 22: Resource and String names example

ites Bul	idings Floors			Assets Leasing lanc Business Uni	and the second se	And the Rest of Colored State of Colored State	Ops Mgl	ow De
MOVE RE	QUEST CUSTO	M ATTRIBUTES				1	NEW DELETE	1
	Position	and the second second	Name	Transaction 1	Type		Default Value	
		0 Approval I	Email	Resource				
		0 Approval I	Email STR	String				
		4 Avaliable	Dates	DropDown				

When the user selects a HR in a Move Request that is not currently a Resource record, the system will add them. Then, when the user populates a Resource UDA, the email field from the HR record will populate the Email field (this can be changed on the form).

When the user saves the Move Request, the STR UDA field will be auto populated with the Email field.

The Email Rule must include the UDA STR name as in the following example.

Attributes			
*Business Object:	NoveRequest	*	
"Status Field:	status	×	
*Status Value:	Submitted	~	
To Site:		*	The content of the
To Building:		*	UDA will be used t
Send To:	UDA Value	*	email address.
"UDA:	Approval Email STR	*	
*EmailTemplate:	Request Approval	¥	
Approval Required:	Yes	~	
*Accepted State:	Approvar1	*	
"Rejected State:	Denied	~	

Figure 23: Email rule using a UDA STR field

**NOTE:** Multiple approval levels can be set up by configuring pairs of resource/STR UDAs (such as Approval 1 Email/Approval 1 Email STR and Approval 2 Email/Approval 2 Email STR).

#### Setting up the Email Template for MAC Approvals

Us e the following as an example of how to set up the email template.

\*Content differs per client\*

Figure 24: Example Email Template

<html></html>
<body></body>
Employee: <employee item="" name="" or=""></employee>
From Location:
Bldg: <from building=""></from>
Flr: <from floor=""></from>
Space: <from space=""></from>
To Location:
Bldg: <to building=""></to>
Flr: <to floor=""></to>
Space: <to space=""></to>
> >
Please click the links below to either accept or reject this Move Request
> >
<link format="accept_reject" link-parameters="action=accept" link-text="Approve" type="link"/>
<link format="accept_reject" link-parameters="action=reject" link-text="Reject" type="link"/>

#### **Example of MAC Approval Request Email**

Figure 25: Example Email Template

Employee: A, SACH					
From Location:					
Bldg:					
Flr:					
Space:					
To Location:					
Bldg:					
Flr:					
Space:					
Please click the links be	low to either acco	ept or reject	this Move Rec	quest	
Approve					

#### **Example of Approved Request**

Figure 26: Example Approval



#### **Example of Rejected Request**

Figure 27: Example Rejection

Г

Thank you bsmith@xyzcompany.com. The	e request has been rejected.

## **MAC Quick Request Form**

The new MAC Quick Request form was created to simplify the creation of Move Requests by capturing all of the necessary information on one screen. All of the configuration settings (email rules, notifications, drop-downs, details, etc. that are available in the full MAC application are available in the MAC Quick Request form.

	IAC Quick Request form				e field is automatically d based on your login,
ew Move Req	uest My Move Requests			· ·	can search for a
REATE NEW MON	VE REQUEST			-	name if necessary.
			Details		
Who					
Name:	Smith, Mary	Q	Network Printer:		
Move From:	Bldg 5912		Requestor Email:		
	-		Keyboard Tray:		
	E View From Floor and Select Move To Space	•	Ergo Furniture:		
Where			Date Change:		
Region:	No Region	~	Comments:		
Site:	Cambridge	~			
Building:	Building 9	-			
Floor:		~			
Space:		~		These	three fields are
opace.	View To Floor and Select Move To Space				natically populated, on the Name field.
When				, acca	
Requested Mo	ove Date:				
Why					

- Select a Name, Floor, and Space.
- Click the View To Floor and Select Move to Space button. The Floor Plan will be displayed similar to the following figure:

Figure 29: MAC Quick Request Space Selection



 Use the cursor to point to the new space and click on it. You will see a confirmation message as shown in the following figure:

Figure 30: MAC Quick Request Space Selection confirmation



- Click the **Yes** button. You are returned to the MAC Quick Request form.
- Select a **Requested Move Date** from the "When" section of the form.
- Optionally enter comments in the "Why" section of the form.
- When you have finished, click the SUBMIT MOVE REQUEST button. The Move Request can now be displayed in the full MAC application).

Figure 31: Submitted MAC Quick Request

MANHATTAN				
New Move Request	My Move Requests			
NEW MOVE REQUEST R-00	0029 HAS BEEN SUBMITTED			
Name:	Smith, Mary			
Move From:	Bldg 5912 2 2 6			
Move To:	Bldg 5999 2 – 34 9188 Office			
Requested Move Date:	2013-10-16			
Description:	why the move needs to happen.			
Network Printer:	No			
Requestor Email:	noemai@email.com			
Keyboard Tray:	No			
Ergo Furniture:	ergo furniture			
Date Change:	No			
Comments:	comments comments comments v comments comments comments comments			
		CREATE ANOTHER MOVE REQUEST		

 At this point, you can create another request or select My Move Requests to view the status and progress of your submitted requests as shown in the following figure:

Figure 32: MY Move Requests

lew Move Request	My Move Reque	octo			
iew nove request	My Move Reque	:5(5			Your cursor will be displaye
MY MOVE REQUE	STS				as an "HR" icon.
Recently Viev	ved 👻	Edit 🗔 Add	Remove		
Request Number	Request Type	Request Date	Requested By	Request Status	Move Size
R-00009		2013-09-25	Cauble, Diane	Approved	1
R-00008		2013-09-25	Cauble, Diane	Submitted	1
R-00007		2013-09-25	Cauble, Diane	Submitted	1
R-00006		2013-09-24	Cauble, Diane	Submitted	1
R-00005		2013-09-24	Cauble, Diane	Submitted	1
R-00004		2013-09-24	Cauble, Diane	Submitted	1
		2013-09-24	Cauble, Diane	Submitted	

Double-click on any Move Request to view the details.

**NOTE:** The details will be read-only.

Figure 33: View details of a Move Request

Move Request - R-00008 (R	ead-Only)					
Attributes Items	Comments History					
Request Information –						
Request Number:	R-00008	Date: September 25,	2013			
Requested By:	Cauble, Diane	Phone: (508) 381-583	4 Email: dcauble@man	hattansoftwar Lo	cation: BUILDING 9-5-	95AA51
Cost Center:		Move Cost Esti		Item Count:	0	
Request Type:		Need by Date:	September 30, 2013	Request Status:	Submitted	
Description:	Justification for Move					*
						-
						Close

• When you have finished viewing the details of this Move Request, click the **Close** button.

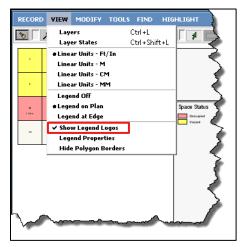
# **Chapter 2: CHANGES**

## Show Legend Logo displayed based on user preference

Previously users who preferred to see legend logos were required to select "Show Legend Logos" each time they viewed a Floor Plan. You can now select "Show Legend Logos" once and it will be displayed whenever a drawing is displayed, even if you log out.

Navigation: Display any Floor Plan  $\rightarrow$  View  $\rightarrow$  Show Legend Logos

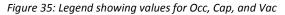
Figure 34: Help About displaying additional information

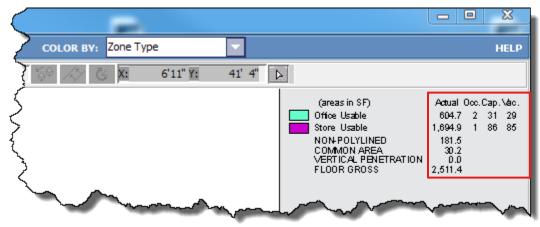


# Floor Legend displays the values for Occupancy, Capacity, and Vacancy in Flex Zones

Formerly the Occupancy, Vacancy, and Capacity in Flex Zones appeared in the Floor Plan legend as "N/A". They now display the actual values for each.

Navigation: STRUCT UNITS  $\rightarrow$  Zones  $\rightarrow$  Search  $\rightarrow$  double-click a Zone  $\rightarrow$  View – Legend Properties  $\rightarrow$  check boxes for Totals, Occupancy Count, Capacity Count, and Vacancy Count  $\rightarrow$  Click OK  $\rightarrow$  COLOR BY – Zone Type, view the Legend





## **Email Rules Template – Approve/Deny field added**

When creating Email Templates in previous versions, the Email Editor for **Move Requests** did not include the field **<Approve/Deny>**. It has been added, enabling users to include them in rules to manage the automatic generation of emails based on whether a Move was approved or denied.

Navigation: SETUP → Email Tmplts → New → Email Template Type – Move Request

Percond       EDIT       HEPORTS         Ceneral Information       "Email Template Name:       Request Approval         Description:       "Email Template Type:       Move Request       Image: Comparing the second	Email Templat	te: Request Approval		
*Email Template Name: Request Approval Description: *Email Template Type: Move Request Fields: <approve deny=""> <building> <comment add="" date=""> <company bu="" desc=""> <company bu="" name=""> <company bu="" name=""> <compartment bu="" desc=""> <department bu="" desc=""> <department bu="" name=""> <department bu="" name=""> <departmen< th=""><th><u>R</u>ECORD ED</th><th>DIT HELP I REPORTS</th><th></th><th>?</th></departmen<></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></department></compartment></company></company></company></company></company></company></company></company></company></comment></building></approve>	<u>R</u> ECORD ED	DIT HELP I REPORTS		?
Fields: <approve deny="">        Subject:       The request has been approved by         <building> <comment add="" date="">       Body:       <html> <company bu="" desc=""> <body> <li>ktwl&gt;       <body> <company bu="" name=""> <li>ktwl&gt;       <body> <company bu="" number=""> <li>ktwl&gt;       <body> <completion date=""> <li>ktwl* format="accept_reject" link-text="Approve" /&gt; <link format="accept_reject" link-parameters="action=reject" link-text="Approve" type="link"/> </li></completion></body> <date change="" last=""> <department bu="" desc=""> <department bu="" number=""> <department bu="" number=""> <department bu="" name=""> <department bu="" name=""> <description> <division bu="" desc=""> <division bu="" name=""></division></division></description></department></department></department></department></department></date></li></company></body></li></company></body></li></body></company></html></comment></building></approve>		*Er *E	Des	cription:
		<approve deny=""> <building> <comment add="" date=""> <company bu="" desc=""> <company bu="" name=""> <company bu="" number=""> <completion date=""> <date change="" last=""> <department bu="" desc=""> <department bu="" name=""> <department bu="" number=""> <description> <division bu="" desc=""> <division bu="" name=""></division></division></description></department></department></department></date></completion></company></company></company></comment></building></approve>		<html> <body> <link <br="" format="accept_reject" type="link"/>link-parameters="action=accept" link-text="Approve" /&gt; <link type="link" format="accept_reject" link-parameters="action=reject" link-text="Reject" /&gt; </link </body></html>

Figure 36: Move Request Email Editor showing new field and an example of how it could be used

### Warning Message when HR is in another Move

When an HR record is added to a move and it is already included in at least one other move, a warning message will now appear to notify you so you can determine whether to continue with the current move. This warning message appears in two places:

- Move/Movelist tab when the HR record is added to another movelist via the Assign button.
- Move/Floors tab when the HR record is added directly to a space on the floor plan and also included in another move.

This warning message appears irrespective of the location details (i.e., whether the HR record is involved in multiple moves to the same space or to different spaces).

Figure 37: HR Move Warning

🛓 Select	an option:
?	leon, leon is already in the Move List for the following Move(s): mv-6006-3 - Phase 1
	Do you also want to assign this Human Resource to the current Move List?

## **Navigation Tree Error Removed**

The error previously received when expanding a list of Business Units on the Navigation Tree has been removed.

# As Of Date

When selecting or creating a scenario in the Scenario Planning Drawing Viewer, the **As of Date** now defaults to the current system date when the Start Date of the scenario is prior to the current system date.