

Nuvolo Certified Implementation Specialists- Space Solution

Space Portfolio Management Job Aid

Version 1.0



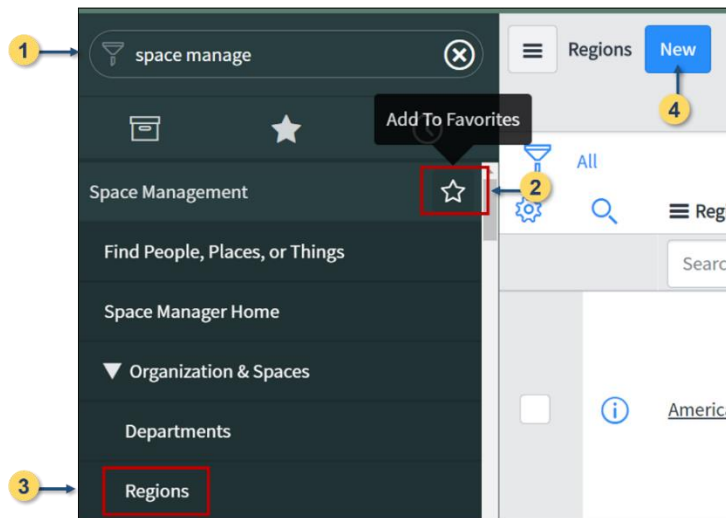


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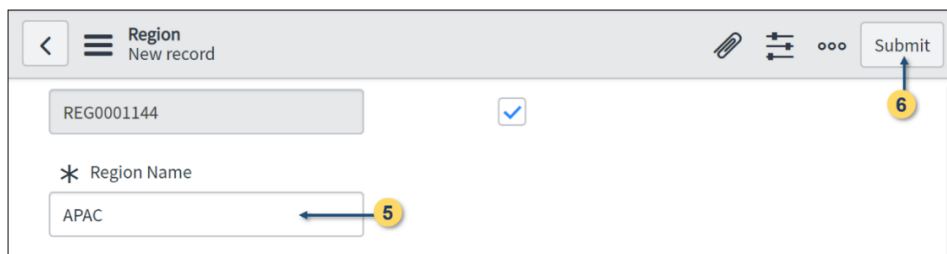
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Add a Region record

1. Go to the Filter navigator search field and enter any part of the words Space Management.
2. Save the application to **Favorites** by rolling over the item and select the star icon.
Clear the star icon to deselect the item as a favorite.
3. Select **Regions**.
4. Select **New**.



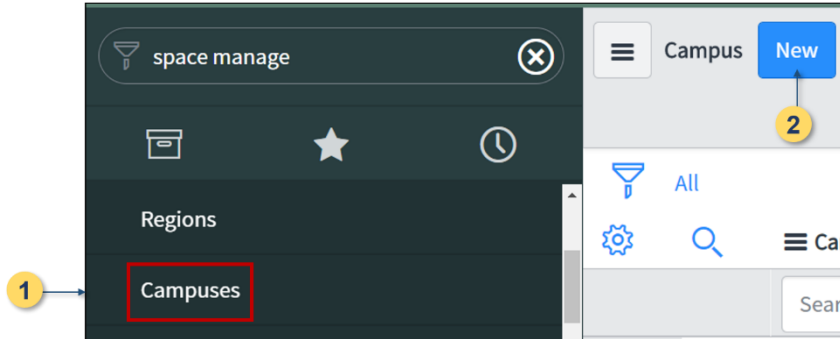
The Region New record window displays as shown.



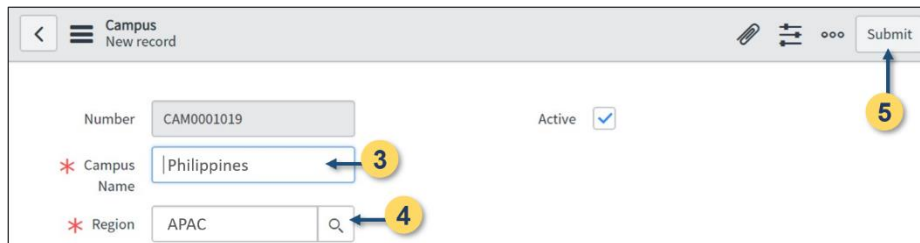
5. Enter in a **Region Name**. For example, APAC.
6. Select **Submit**.

Add a Campus record

1. Select **Campuses**.
2. Select **New**.



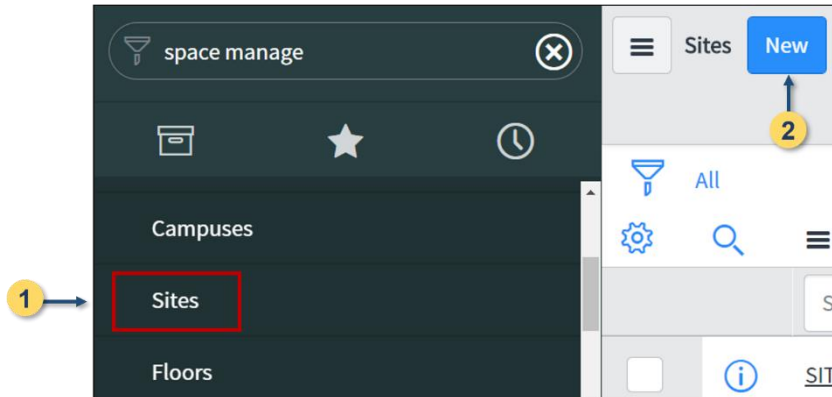
The Campus New record window displays as shown.



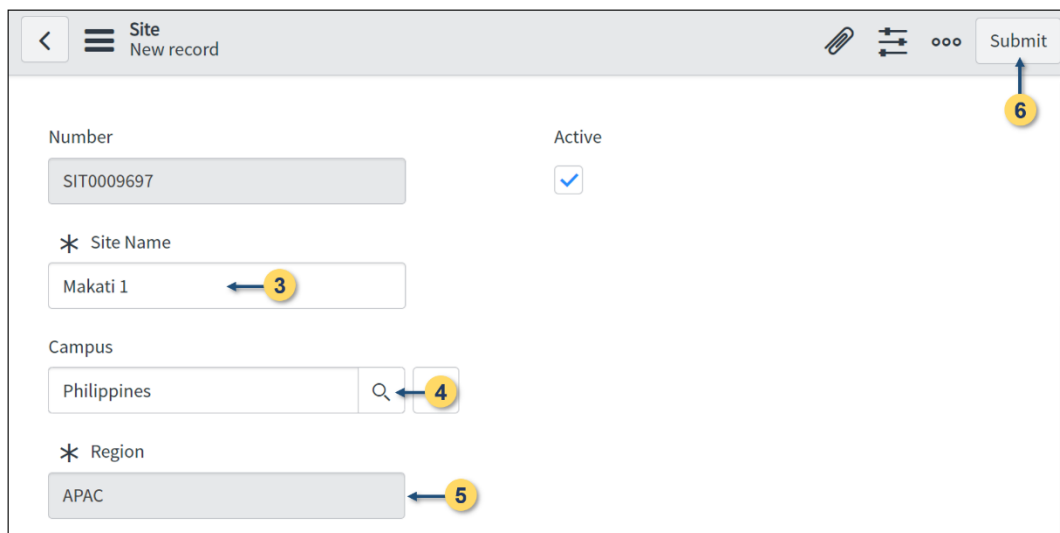
3. Enter a **Campus Name**. For example, Philippines.
4. Select the magnifying glass to search for a **Region**. For example, APAC.
Selecting an existing region record links the campus and auto-populates the Region field.
5. Select **Submit**.

Add a Site record

1. Select **Sites**.
2. Select **New**.

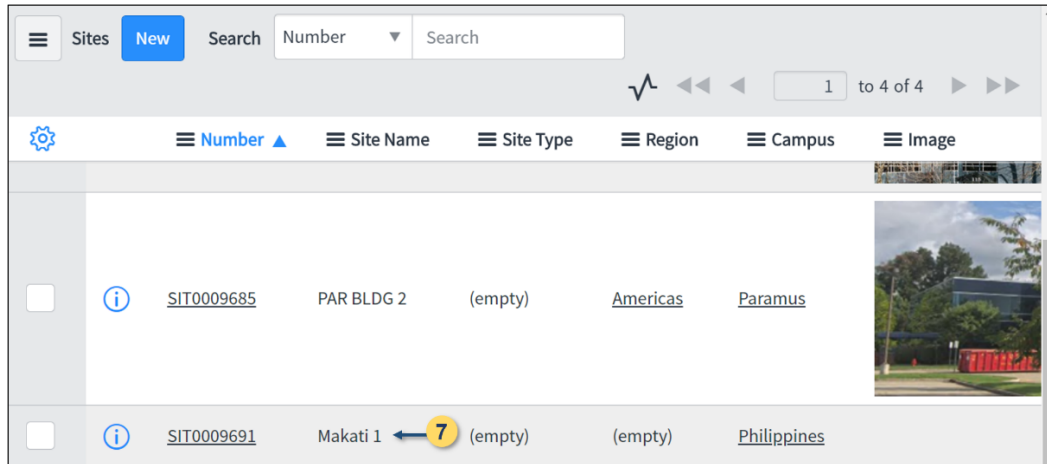


The Site New record window displays as shown.



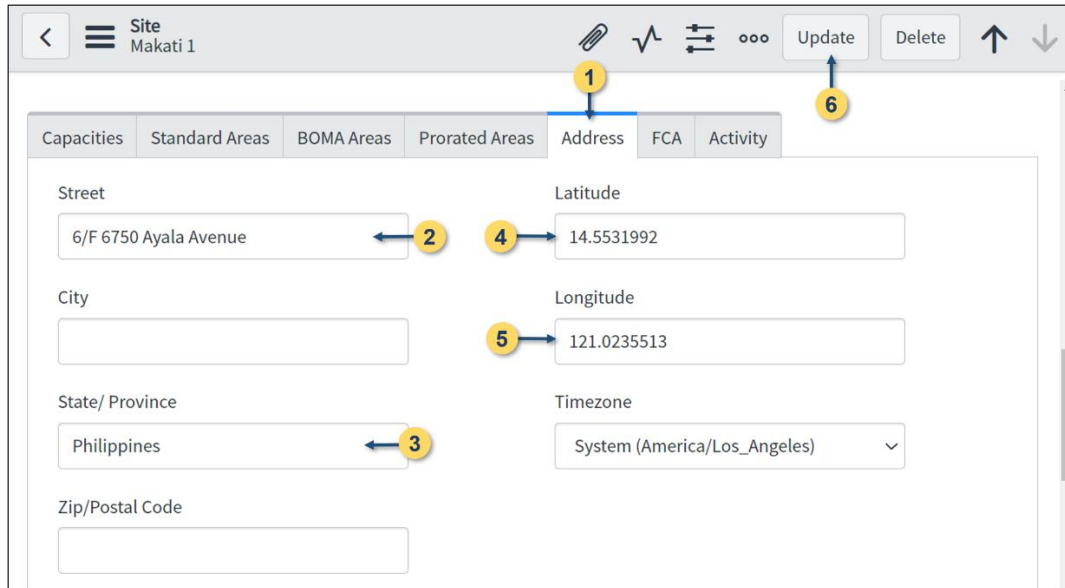
3. Enter a **Site Name**. For example, Makati 1.
4. Select the magnifying glass, and search for a **Campus**. For example, Philippines.
5. Selecting an existing campus record auto-populates the Region field.
6. Click **Submit**.

The Sites windows displays a list of site records as shown.



7. Select the newly created record. For example, SIT0009691.

The Site record opens as shown.



The screenshot shows the 'Site Makati 1' record in the 'Address' tab. The form contains the following fields and values:

- Street:** 6/F 6750 Ayala Avenue
- City:** (Empty)
- State/ Province:** Philippines
- Zip/Postal Code:** (Empty)
- Latitude:** 14.5531992
- Longitude:** 121.0235513
- Timezone:** System (America/Los_Angeles)

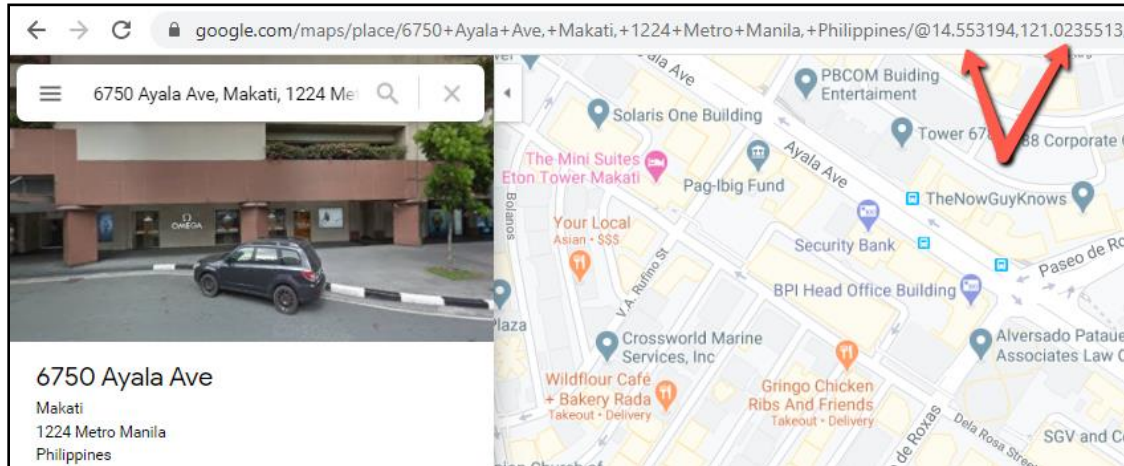
Numbered callouts indicate the steps: 1. Select the Address tab, 2. Enter the Street, 3. Enter the State / Province, 4. Enter the Latitude, 5. Enter the Longitude, 6. Click the Update button.

1. Go to the Capacities record and select the **Address** tab.
2. Enter the **Street**.
3. Enter the **State / Province**.
4. Enter the **Latitude**.
5. Enter the **Longitude**.
6. Select **Update**.

Note: Go to mapbox.com or Google Maps to obtain latitude and longitude information.

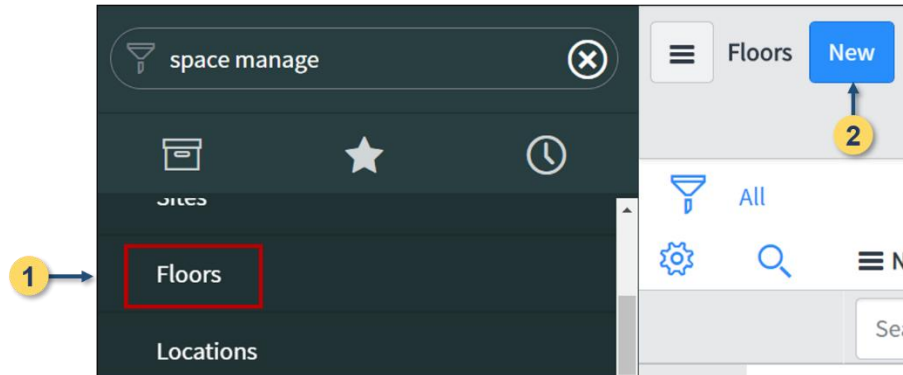
Go to mapbox.com to sign up for a free account.

Go to Google maps and enter the address in the search box. The latitude and longitude appear in the URL or address bar. For example, Makati 1 is located at Latitude 14.553194 and Longitude 121.0235513 as shown.

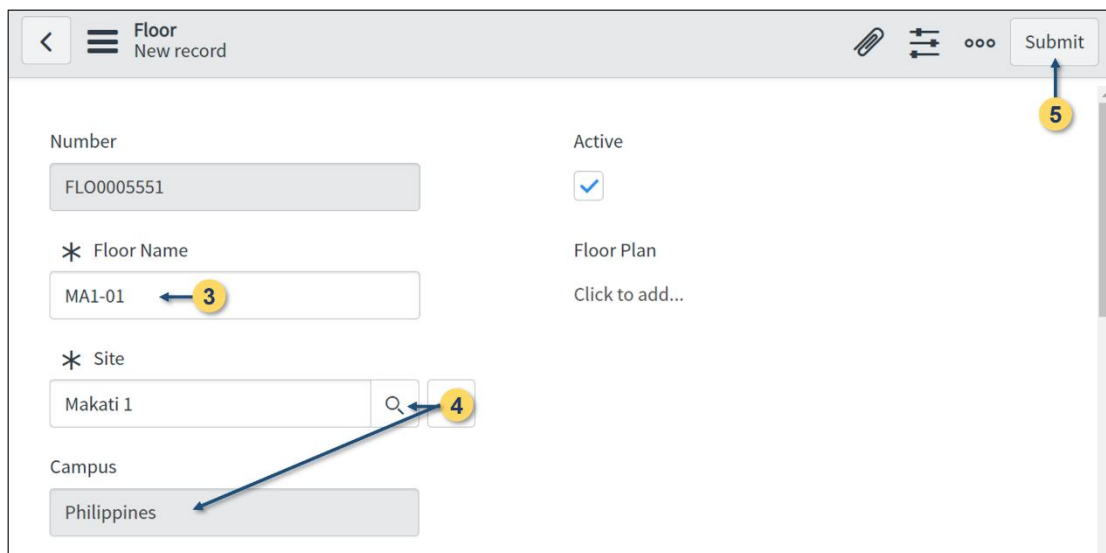


Add a Floor record

1. Select **Floors**.
2. Select **New**.



The Floor New record window opens as shown.



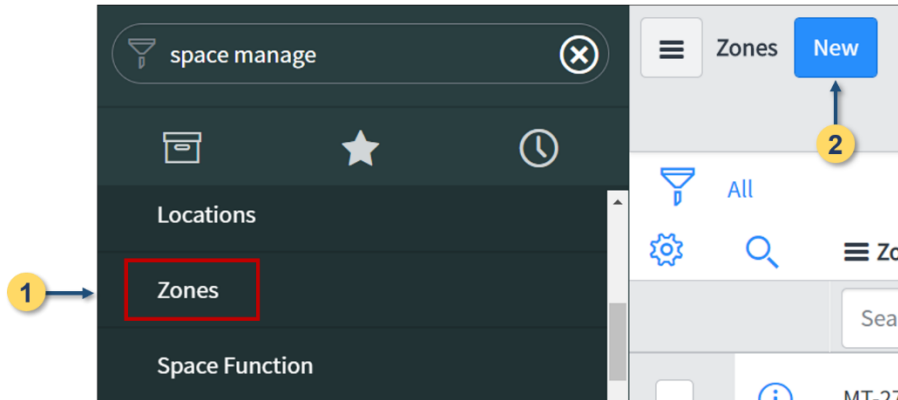
The screenshot shows the 'Floor New record' form. The form has the following fields and elements:

- Number:** A text field containing 'FLO0005551'.
- Active:** A checkbox that is checked.
- * Floor Name:** A text field containing 'MA1-01', with a yellow circle '3' pointing to it.
- * Site:** A text field containing 'Makati 1', with a magnifying glass icon to its right. A yellow circle '4' points to the magnifying glass.
- Campus:** A text field containing 'Philippines'.
- Floor Plan:** A section with the text 'Click to add...'.
- Submit:** A button in the top right corner, with a yellow circle '5' pointing to it.

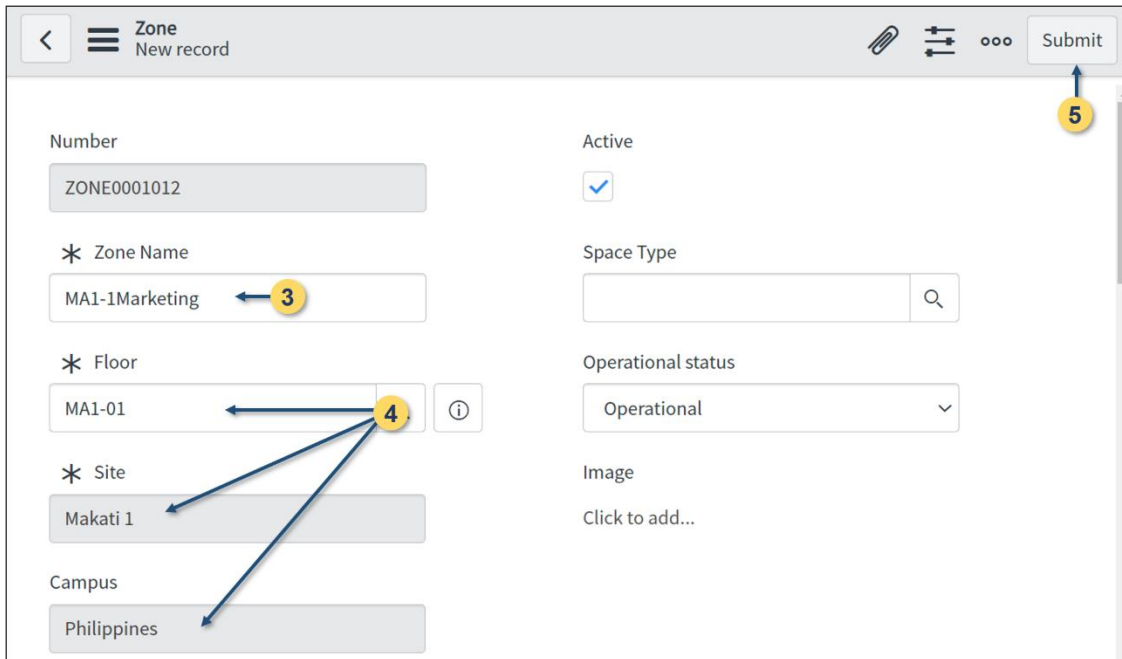
3. Enter a **Floor Name**. For example, MA1-01.
4. Select the magnifying glass to search for a **Site** record.
Selecting an existing site record auto-populates the campus field.
5. Select **Submit**.

Add a Zone record

1. Select **Zones**.
2. Select **New**.



The Zone New record window opens as shown.



The screenshot shows the 'Zone New record' window. The header bar includes a back arrow, a menu icon, the title 'Zone New record', and icons for attachments, filters, and a 'Submit' button. The form contains the following fields:

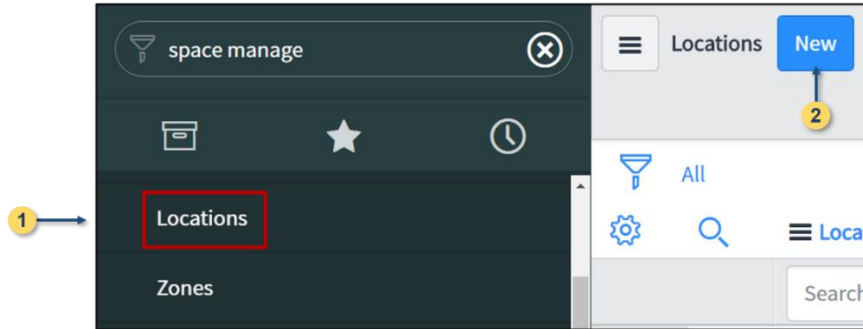
- Number:** A text field containing 'ZONE0001012'.
- Active:** A checkbox that is checked.
- * Zone Name:** A text field containing 'MA1-1Marketing'. A yellow circle with the number '3' and an arrow points to this field.
- * Floor:** A text field containing 'MA1-01'. A yellow circle with the number '4' and an arrow points to the magnifying glass icon next to this field.
- * Site:** A text field containing 'Makati 1'.
- Campus:** A text field containing 'Philippines'.
- Space Type:** A search field with a magnifying glass icon.
- Operational status:** A dropdown menu showing 'Operational'.
- Image:** A section with the text 'Click to add...'.

A yellow circle with the number '5' and an arrow points to the 'Submit' button in the top right corner.

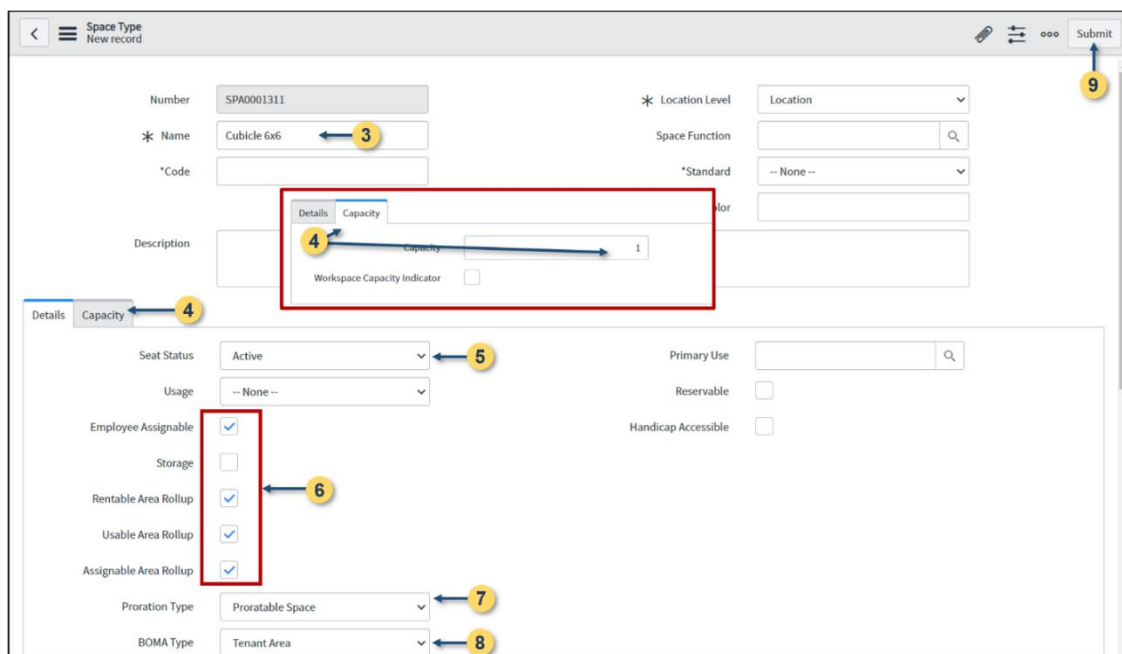
3. Enter a **Zone Name**. For example, MA1-Marketing.
4. Select the magnifying glass to search for a **Floor** record.
Selecting an existing floor record auto-populates the site and campus fields.
5. Select **Submit**.

Add a Location Type record

1. Select **Location Types**.
2. Select **New**.



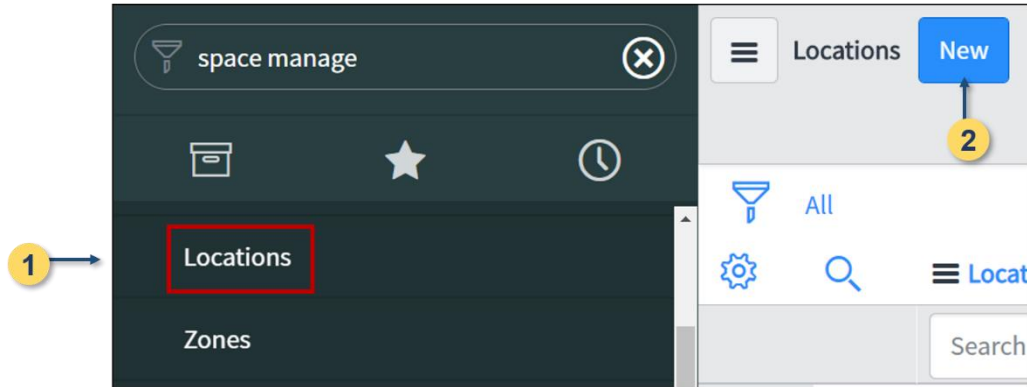
The Space Type New record window opens as shown.



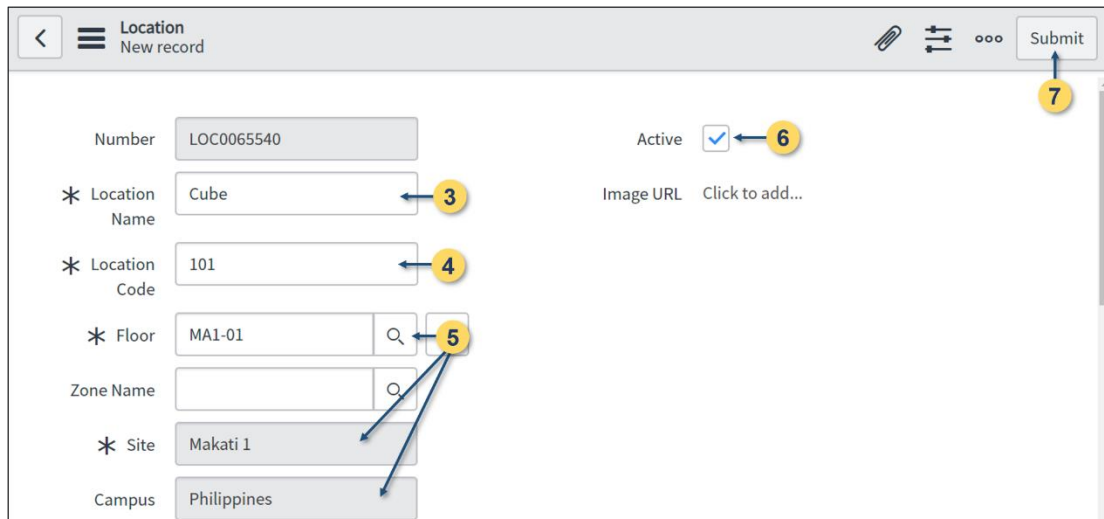
3. Enter a **Name**. For example, Cubicle 6x6.
4. Select the **Capacity** tab. Enter the **Capacity**. For example, 1.
5. Select the drop-down menu for **Seat Status**. For example, Active.
6. Select the **attributes**. For example, Employee Assignable, Rentable Area Rollup, Assignable, and Area Rollup.
7. Select the drop-down menu to select a **Proration Type**. For example, Proratable Space.
8. Select the drop-down menu to select a **BOMA Type**. For example, Tenant Area.
9. Select **Submit**.

Add a Location record

1. Select **Locations**.
2. Select **New**.



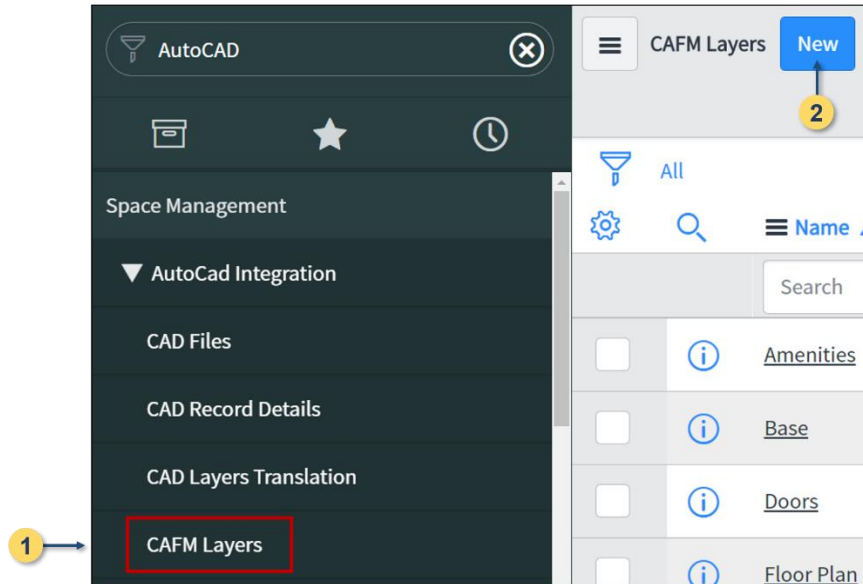
The Space Type New record window opens as shown.



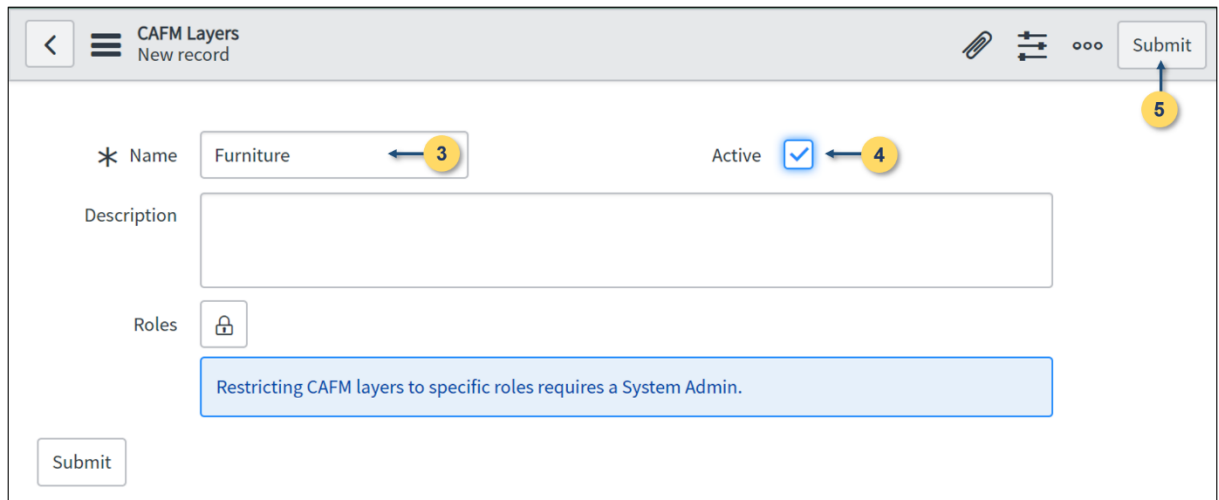
3. Enter a **Location Name**. For example, Cube.
4. Enter a **Location Code**. For example, 101.
5. Select the magnifying glass to search for a **Floor**.
Selecting an existing floor record auto-populates the site and campus fields.
6. Select the **Active** box.
7. Select **Submit**.

Add a CAFM Layers record

1. Select **CAFM Layers**.
2. Select **New**.



The CAFM Layers New record window opens as shown.

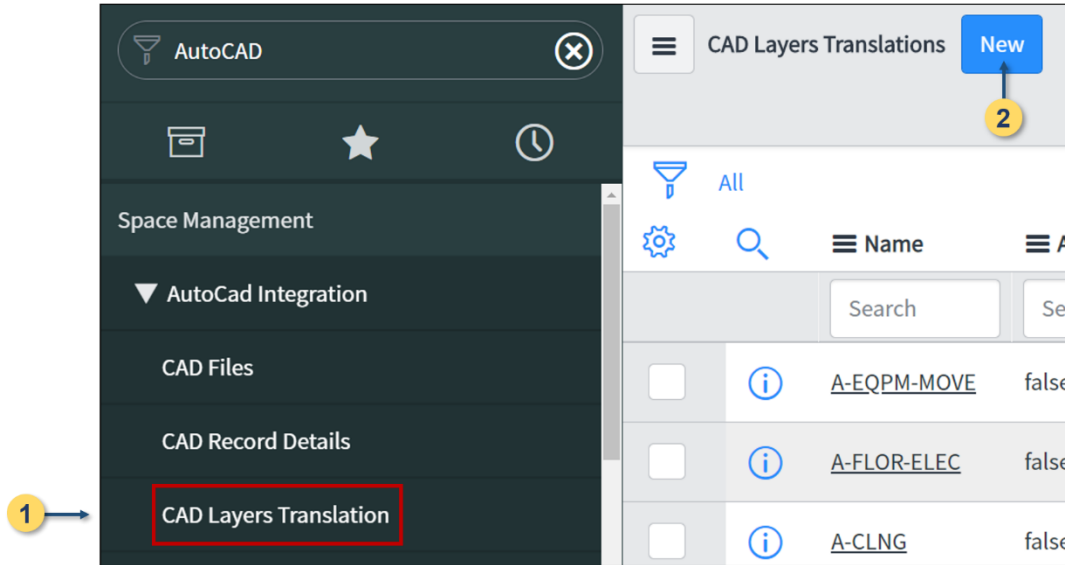


The screenshot shows the 'CAFM Layers New record' form. At the top, there is a header bar with a back arrow, a menu icon, the text 'CAFM Layers New record', and a 'Submit' button with a yellow circle '5' pointing to it. The form fields are: 'Name' (with a yellow circle '3' pointing to the input field containing 'Furniture'), 'Active' (with a checked checkbox and a yellow circle '4' pointing to it), 'Description' (a large text area), and 'Roles' (a dropdown menu showing a lock icon). A blue message box below the Roles field states: 'Restricting CAFM layers to specific roles requires a System Admin.' A 'Submit' button is at the bottom left.

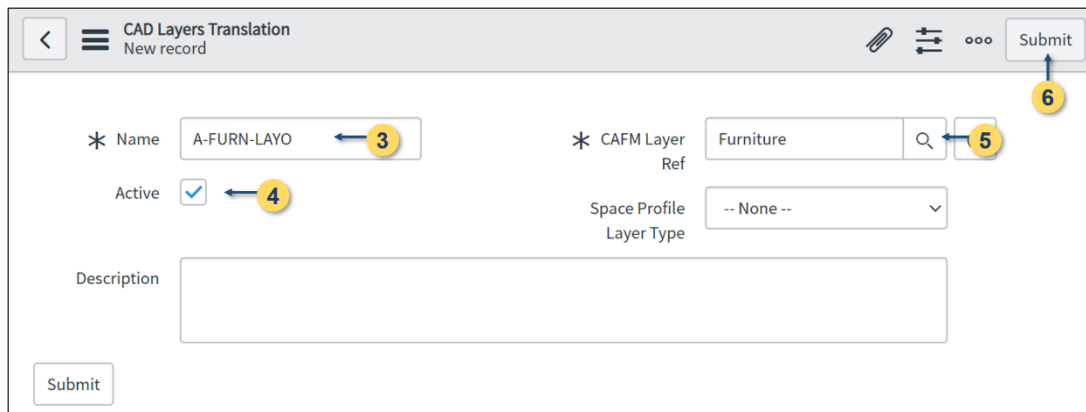
3. Enter a **Name**. For example, Furniture.
4. Select the **Active** box.
5. Select **Submit**.

Add a CAD Layers Translation record

1. Select **CAD Layers Translation**.
2. Select **New**.



The CAD Layers Translation New record window opens as shown.

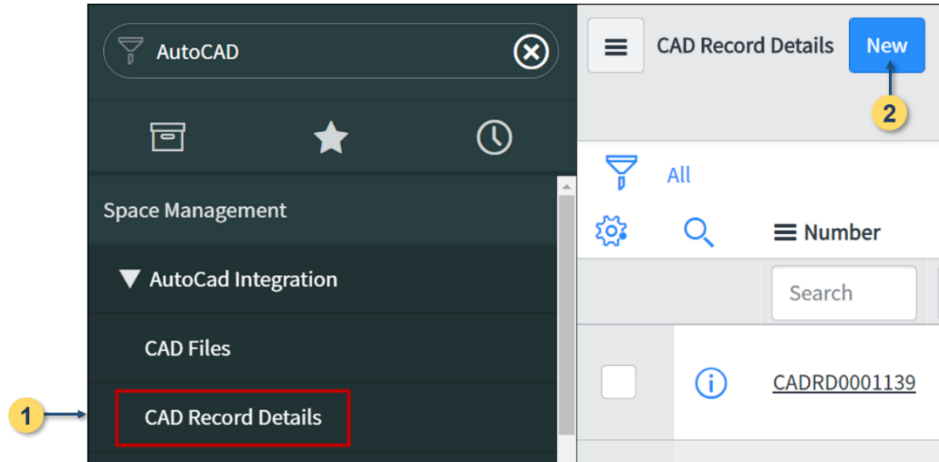


The screenshot shows the 'CAD Layers Translation New record' form. It includes fields for Name, Active, Description, CAFM Layer Ref, and Space Profile Layer Type. A yellow callout '3' points to the Name field containing 'A-FURN-LAYO'. A yellow callout '4' points to the Active checkbox, which is checked. A yellow callout '5' points to the magnifying glass icon next to the CAFM Layer Ref field, which contains 'Furniture'. A yellow callout '6' points to the Submit button in the top right corner.

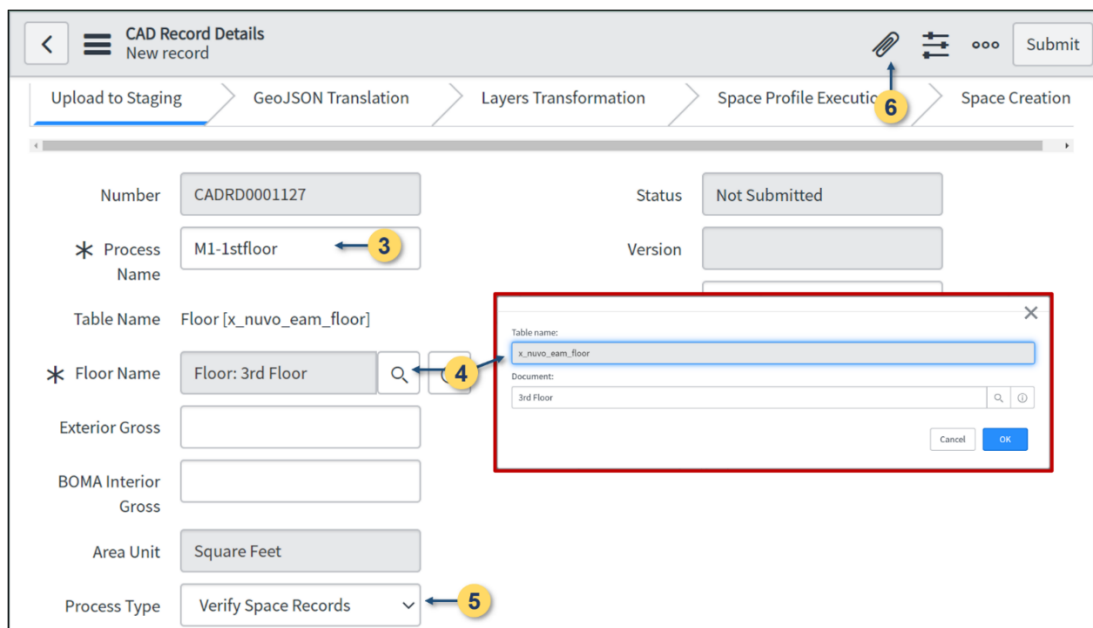
3. Enter a **Name**. For example, A-FURN-LAYO.
4. Select the **Active** box.
5. Select the magnifying glass to search for a **CAFM Layer Ref**. For example, Furniture.
6. Select **Submit**.

Upload DXF file to Nuvolo

1. Select **CAD Record Details**.
2. Select **New**.



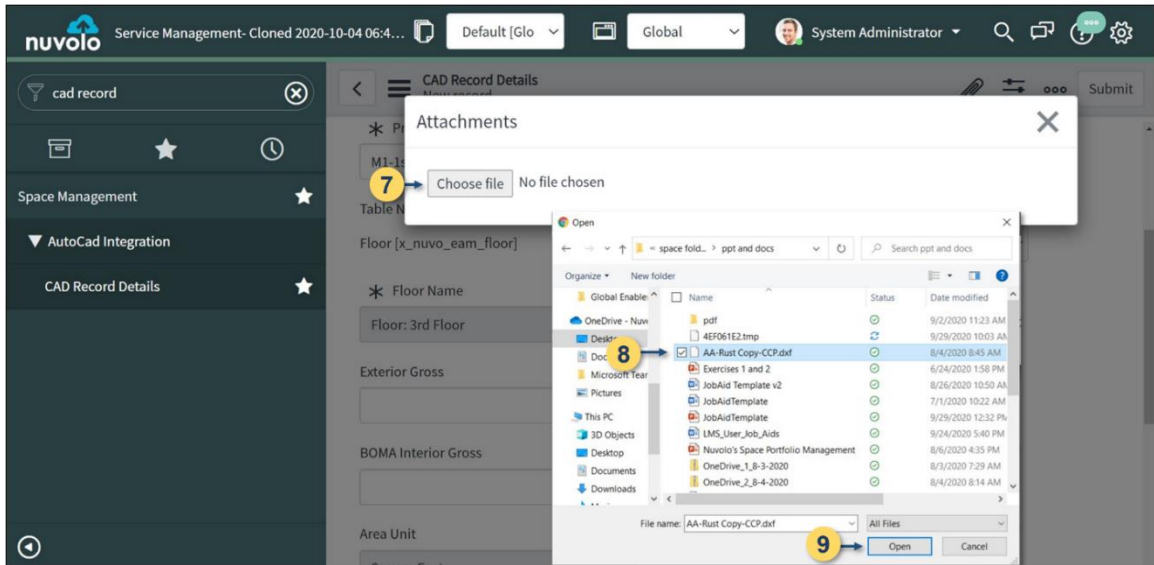
The CAD Records Details New record window opens as shown.



3. Enter a **Process Name**. For example, M1-1st floor.
4. Select the magnifying glass to select a **Floor Name** and select **OK**. For example, 3rd Floor.
5. Select the drop-down menu to select a **Process Type** and click **Submit**. For example, Verify Space Records.

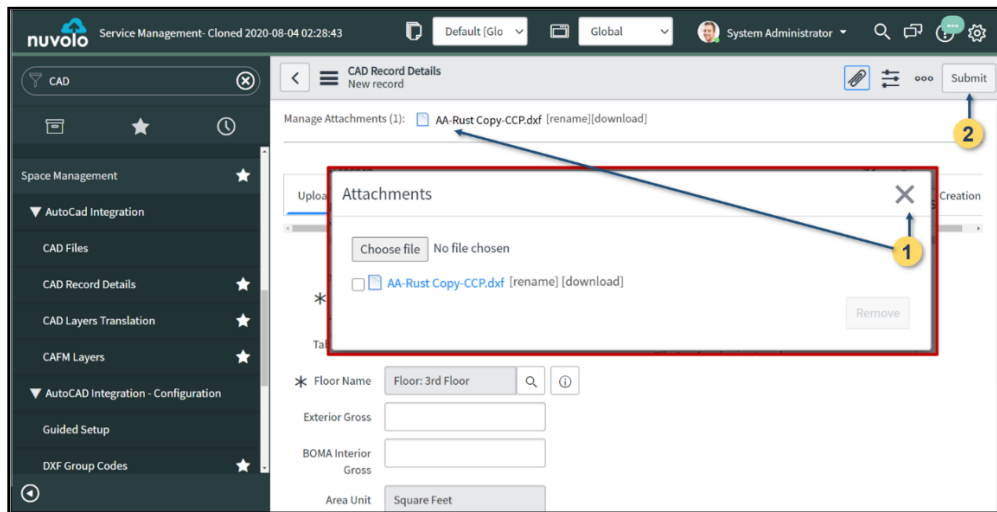
Note: Automate Process will run all the way through. Manual Process requires verifying space records. Verify Space Records does all the processing.

6. Select the **paper clip** icon.
The Choose file window opens as shown.



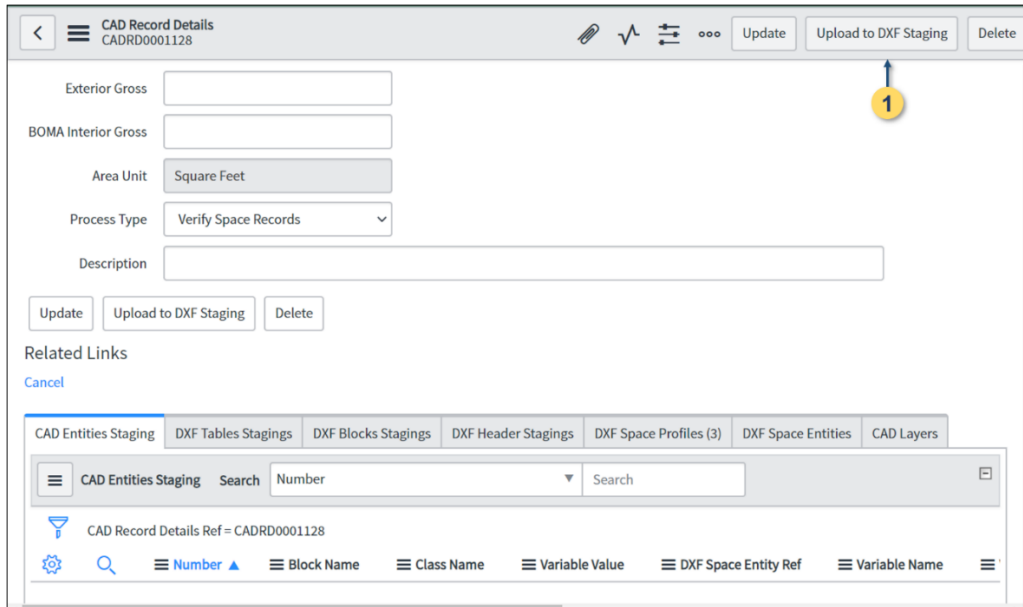
7. Select **Choose file**.
8. Select the **.dxf** file. For example, AA-Ruse Copy-CCP.dxf.
9. Select **Open**.

Note: DXF files are larger than AutoCAD files and take longer to upload due to file bloat. The Manage Attachment window appears as shown.



1. Go to the top of the window and verify the correct file is attached by reviewing the Manage Attachments (1). Select **X** to close the Attachments window.
2. Select **Submit**.

The Upload to DXF Staging button appears as shown.



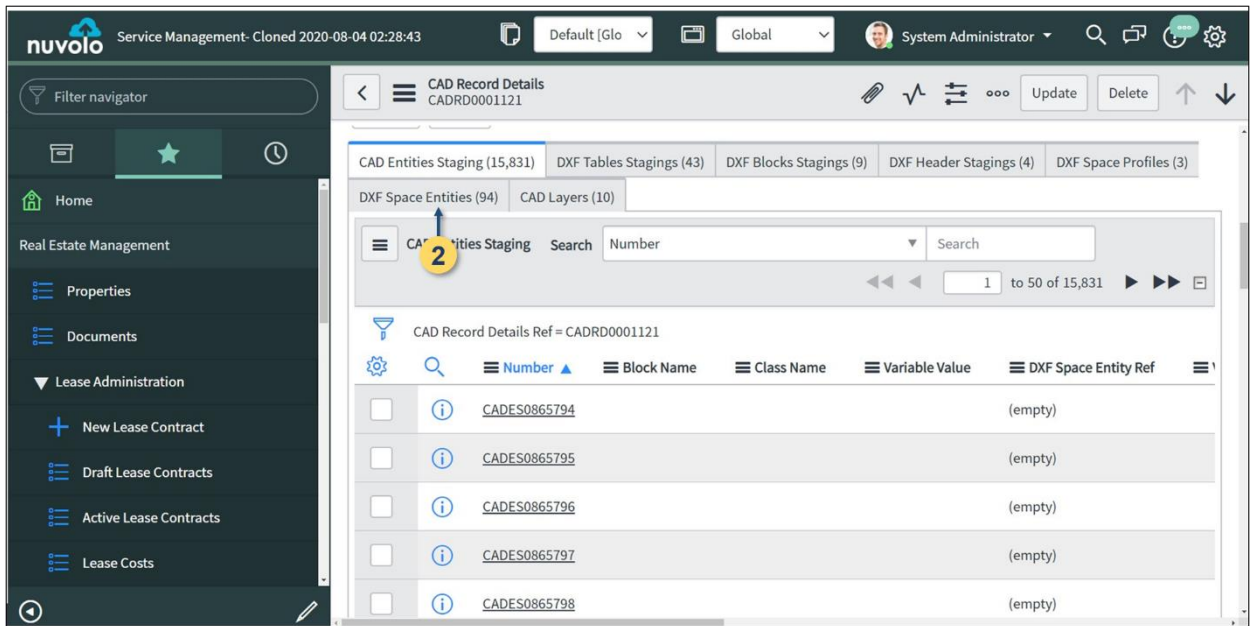
The screenshot shows the 'CAD Record Details' form for record 'CADRD0001128'. The form includes input fields for 'Exterior Gross', 'BOMA Interior Gross', 'Area Unit' (set to 'Square Feet'), 'Process Type' (set to 'Verify Space Records'), and a 'Description' field. Below these fields are three buttons: 'Update', 'Upload to DXF Staging', and 'Delete'. The 'Upload to DXF Staging' button is highlighted with a yellow circle and the number 1. Below the form is a 'Related Links' section with a 'Cancel' link and a tabbed interface for 'CAD Entities Staging', 'DXF Tables Stagings', 'DXF Blocks Stagings', 'DXF Header Stagings', 'DXF Space Profiles (3)', 'DXF Space Entities', and 'CAD Layers'. The 'CAD Entities Staging' tab is active, showing a search bar and a list of records with columns for 'Number', 'Block Name', 'Class Name', 'Variable Value', 'DXF Space Entity Ref', and 'Variable Name'.

1. Select the **Upload to DXL Staging**. Refresh the application to update the number of records. View the number of records populating the tabs. For example, CAD Entities Staging (15,831), DXF Tables Stagings (43), DXF Blocks Stagings (9) etc.

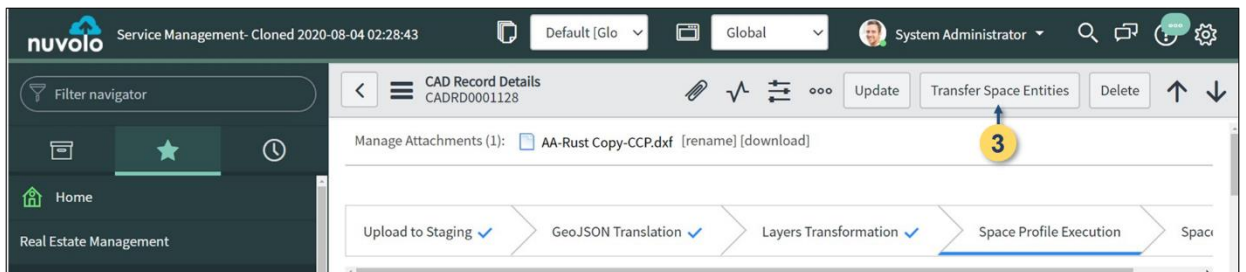


The screenshot shows the 'DXF Staging' tabs with the following record counts: CAD Entities Staging (15,831), DXF Tables Stagings (43), DXF Blocks Stagings (9), DXF Header Stagings (4), DXF Space Profiles (3), DXF Space Entities (94), and CAD Layers (10).

2. Select the **DXL Space Entities** tab. When setting Verify Space Record the system pauses to allow for validation of content before clicking Transfer Space Entities.



The Transfer Space Entities button appears.



3. Select Transfer Space Entities.

Appendix: Nuvolo Space Portfolio User Roles and Access

CRUD = Create, Read, Update/Write, Delete

Organization & Spaces	Admin	Space Admin	Space Manager
Departments	C/R/U/D	C/R/U/D	Read
Regions	C/R/U/D	C/R/U/D	Read
Campuses	C/R/U/D	C/R/U/D	Read
Sites	C/R/U/D	C/R/U/D	Read
Floors	C/R/U/D	C/R/U/D	Read
Locations	C/R/U/D	C/R/U/D	Read
Administration	Admin	Space Admin	Space Manager
OmniSearch - Configs	C/R/U/D	C/R/U/D	No Access
Region Types	C/R/U/D	C/R/U/D	Read
Campus Types	C/R/U/D	C/R/U/D	Read
Site Types	C/R/U/D	C/R/U/D	Read
Floor Types	C/R/U/D	C/R/U/D	Read
Location Types	C/R/U/D	C/R/U/D	Read
Space use Codes	C/R/U/D	C/R/U/D	Read
Space Amenities	C/R/U/D	C/R/U/D	Read
Space Layouts	C/R/U/D	C/R/U/D	Read
Nuvolo User Attributes	C/R/U/D	Read	Read
Location Desktop Properties	C/R/U/D	Read	No Access
Nuvolo Properties	C/R/U/D	Read	No Access
AutoCad Integration	Admin	Space Admin	Space Manager
CAD Files	C/R/U/D	No Access	No Access
CAD Record Details	C/R/U/D	C/R/U/D	No Access
CAD Layers Translation	C/R/U/D	C/R/U/D	No Access
CAFM Layers	C/R/U/D	C/R/U/D	No Access
AutoCAD Integration - Configuration	Admin	Space Admin	Space Manager
Guided Setup	C/R/U/D	No Access	No Access
DXF Group Codes	C/R/U/D	C/R/U/D	No Access
DXF Graph Objects	C/R/U/D	C/R/U/D	No Access
DXF Sections	C/R/U/D	C/R/U/D	No Access
GeoJSON Graph Objects	C/R/U/D	Read	No Access
DXF Space Profile	C/R/U/D	C/R/U/D	No Access
CAD Embedded UI Instructions	C/R/U/D	No Access	No Access
Dynamic Space Attributes Definitions	C/R/U/D	Read	No Access
Space Desktop	Admin	Space Admin	Space Manager
Space Desktop View	C/R/U/D	C/R/U/D	No Access
Color By	C/R/U/D	C/R/U/D	No Access
Space Label	C/R/U/D	C/R/U/D	No Access



BOMA Administration	Admin	Space Admin	Space Manager
BOMA Parameter Definitions	C/R/U/D	C/R/U/D	No Access
BOMA Reports	Admin	Space Admin	Space Manager
Method A	C/R/U/D	C/R/U/D	Read
Method B	C/R/U/D	C/R/U/D	Read
Workspace Manager	Full Access	Full Access	Assign People
Workspace Planner	Full Access	Full Access	No Access
Space Editor	Full Access	Full Access	No Access
Nuvolo Wayfinding	Read	Read	Read

CRUD = Create, Read, Update/Write, Delete