Earnest **SRP**

V20

Users Guide

20201013

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Section 1

Section 1 System, Setup and Configuration

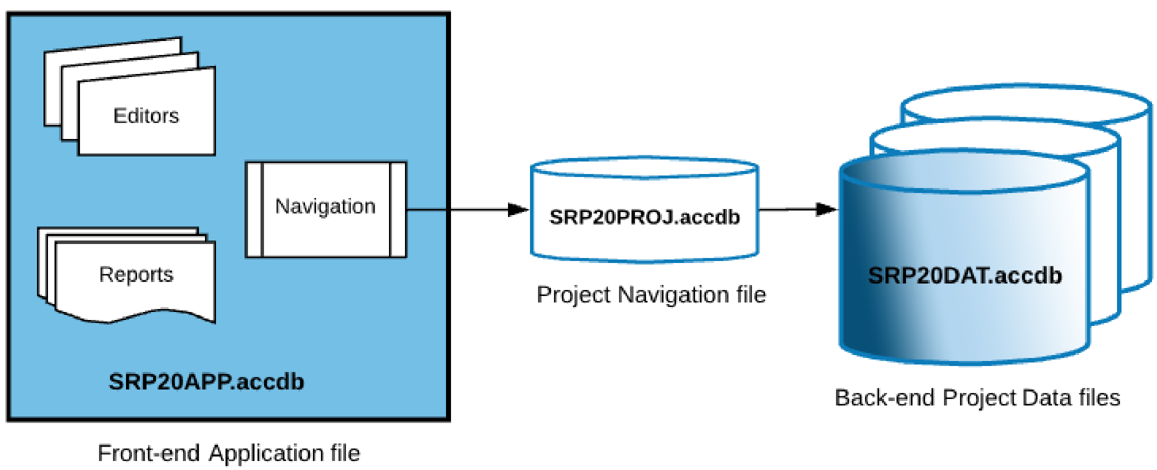
System Requirements

Desktop:
Microsoft ® Windows 10 or newer (32 or 64 bit)
Microsoft ® Access 2013 or newer, or W 365 (32 or 64 bit)
LAN or wireless connection (for multi-user configuration)
Adobe Acrobat (for storing and emailing reports)
25 mb storage for application files

Server: (for multi-user configuration)
Designated shared directories.
Simultaneous, multiple user access, full read and write permissions.
20 MB storage per average project file.

System File Structure

The **SRP** system is composed of three linked Microsoft Access (.accdb) files: the application (APP) file, the Project Navigation (NAV) file, and a project data (DAT) file, plus image and document files.



1. **SRP20App.accdb** - Application file ('APP') - contains all interface-related objects including modules, macros, queries, forms and reports. The APP contains links to tables in the active project database ('DAT') and to the project navigation database ('NAV').
2. **SRP20Proj.accdb** - Project Navigation file ('NAV') - contains the table 'tblProjects', which stores project names and directory path information used in linking projects to the APP, and the table 'tblUsers', which stores the user log-in names.
3. **SRP20Dat.accdb** - Backup Project Data file ('DAT') - a master copy of the project database tables, containing only base system records.
4. **SRP20Smp.accdb** - Sample project file (SMP) a project data file containing records for the SRP Sample Project.
5. **SRPLOGO.ico** - The **SRP** logo image, for use with a Windows desktop shortcut.

Installation

In Windows Explorer, create a directory folder on the primary local drive **C:\EARNEST**
Extract the **SRP20** directory (contains all system files), to the **EARNEST** folder.

1. Confirm that the resulting directory tree and files have been installed correctly:
   - Earnest
     - SRP20
       - SRP20App.accdb
       - SRP20Proj. accdb
       - SRP20Dat. accdb
       - SRP20Smp. accdb
       - SRPLOGO.ico
2. Create a Windows shortcut (desktop and/or quick-start menu) to launch **SRP**
3. Target to open the application file '**SRP20App. accdb**'.
4. In the shortcut properties, change the default ICON to 'SRPLOGO.ico'.

For Multi-user licenses, also:

Create a directory tree on a shared network drive for the end users to share templates, image files etc:

- Read/write permissions for all end-users.
- include in your network's routine back-up

- Earnest Central Files
  - SRP20 Shared
    - Image Files
    - Install Files
      - SRP20
        - SRP20App.accdb
        - SRP20Proj.accdb
        - SRP20Dat.accdb
        - SRP20Smp.accdb
        - SRPLOGO.ico
        - Earnest SRP20 - shortcut
    - Template files
    - Vault

Network / Multi-user setup

In a network environment, users can work on any **SRP** project from any desktop, and multiple users can work on a project simultaneously. To accomplish this, the project data files must be stored in a shared server directory where users can attach to projects from their copy of the **SRP** application.

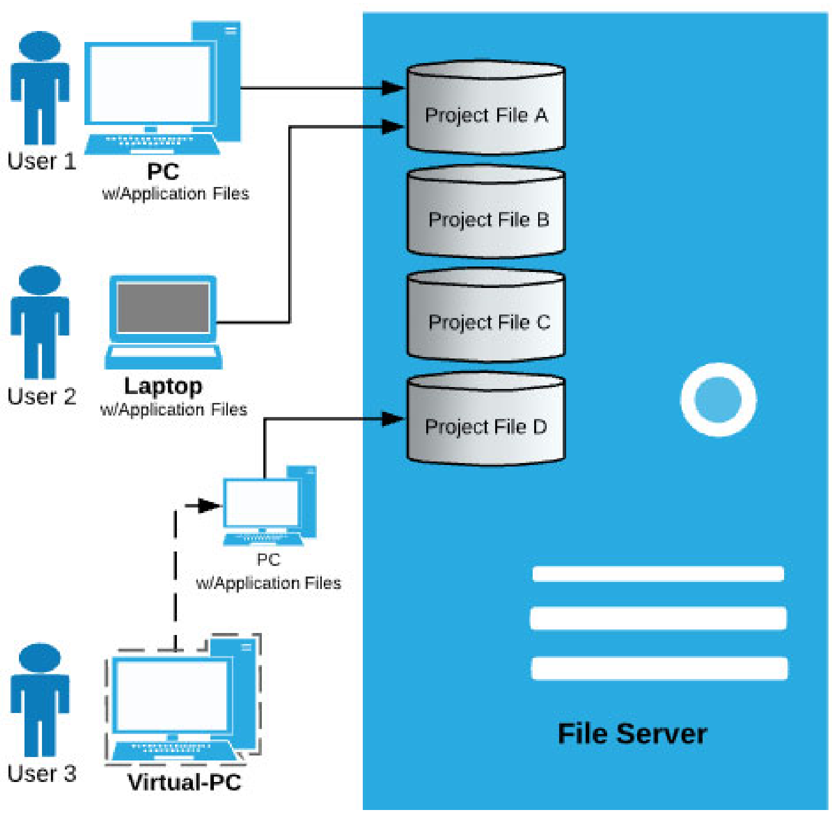
1. Install a full set of **SRP** system files on the local drive on each user's workstation.
2. Confirm that the sharing option for Microsoft Access is set to 'Shared' on each PC (see instructions in 'Access Options' section).
3. Identify the directory(s) for the project file(s) on a shared server drive.

4. Confirm that all users are connected to the network, and have full read/write permission to access the server and shared directories.
5. At the time a new project is created, save the project to the shared project directory.
6. If a project file is first created and saved on a local drive, it can be moved at a later date to a shared location.

Multi-user Data Input

SRP is designed for a networked environment so that multiple people can simultaneously view, edit and report project data.

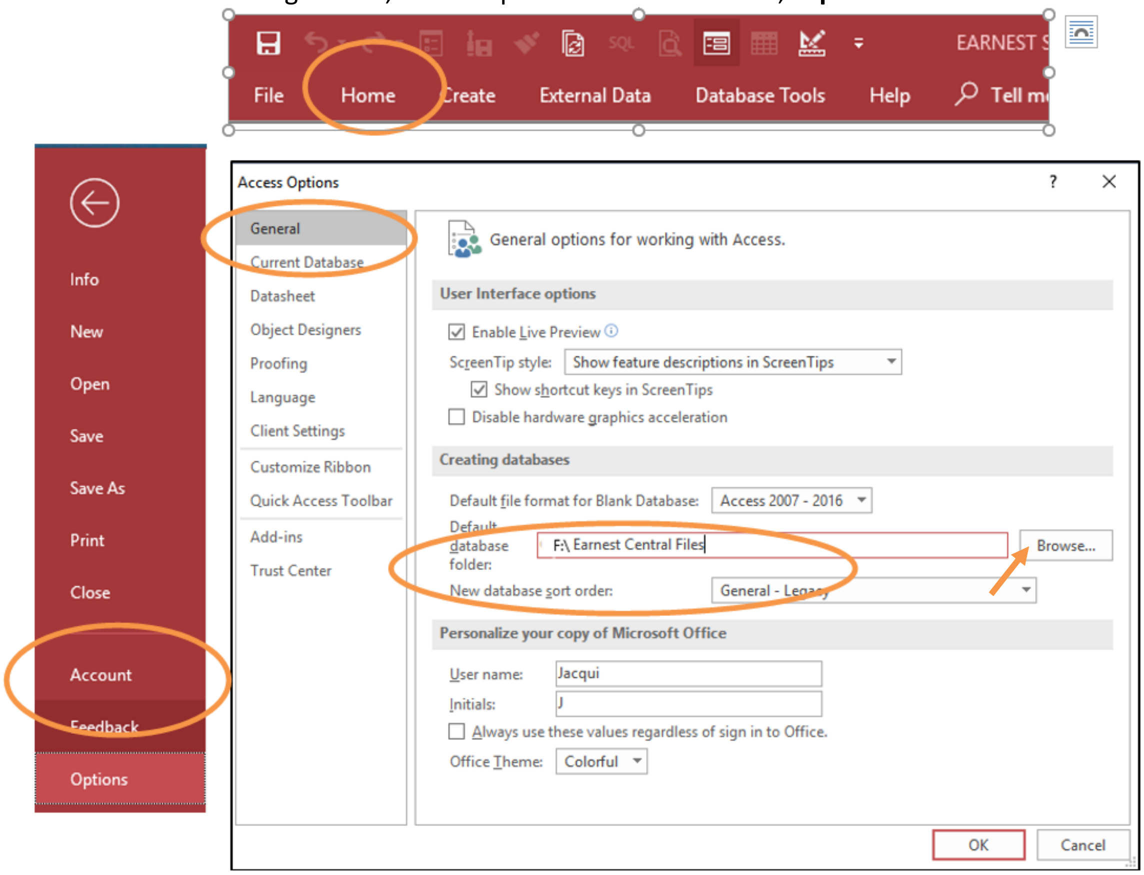
1. Microsoft Access provides an option to open a database 'exclusively' or 'shared'.
   a. When only one user needs access, the file can be opened 'exclusively' (this is the default).
   b. For multiple people to work in it each users machine must be set to 'Shared'.
   c. The setting is in 'Access Options'.
2. Network user permissions determine whether a user can open a file stored in a given directory.
3. In order to open and view SRP project data, the user must have full read/write permissions for the directory that the project file is stored.



Access Options

With a few exceptions, the ‘**Access Options’** defaults should not be changed unless there is a compelling reason.

- To view or change these, in the top menu bar select ‘**File’**; ‘**Options**’.



General - Default database folder

When a user creates a new project, the default database folder is first displayed when they press the ‘Browse’ button. The user can then choose to save a project in the default directory, or can browse to an appropriate project folder. We recommend defaulting a centralized folder on a shared server, rather than on the user’s local drive.

1. In Access Options select **’General’**,
2. Set the ‘**Default database folder’** to a shared directory on your network named ‘Earnest Central Files’, or any other preferred location (preferably not on c:\)
3. Press [**OK**] to save the setting.

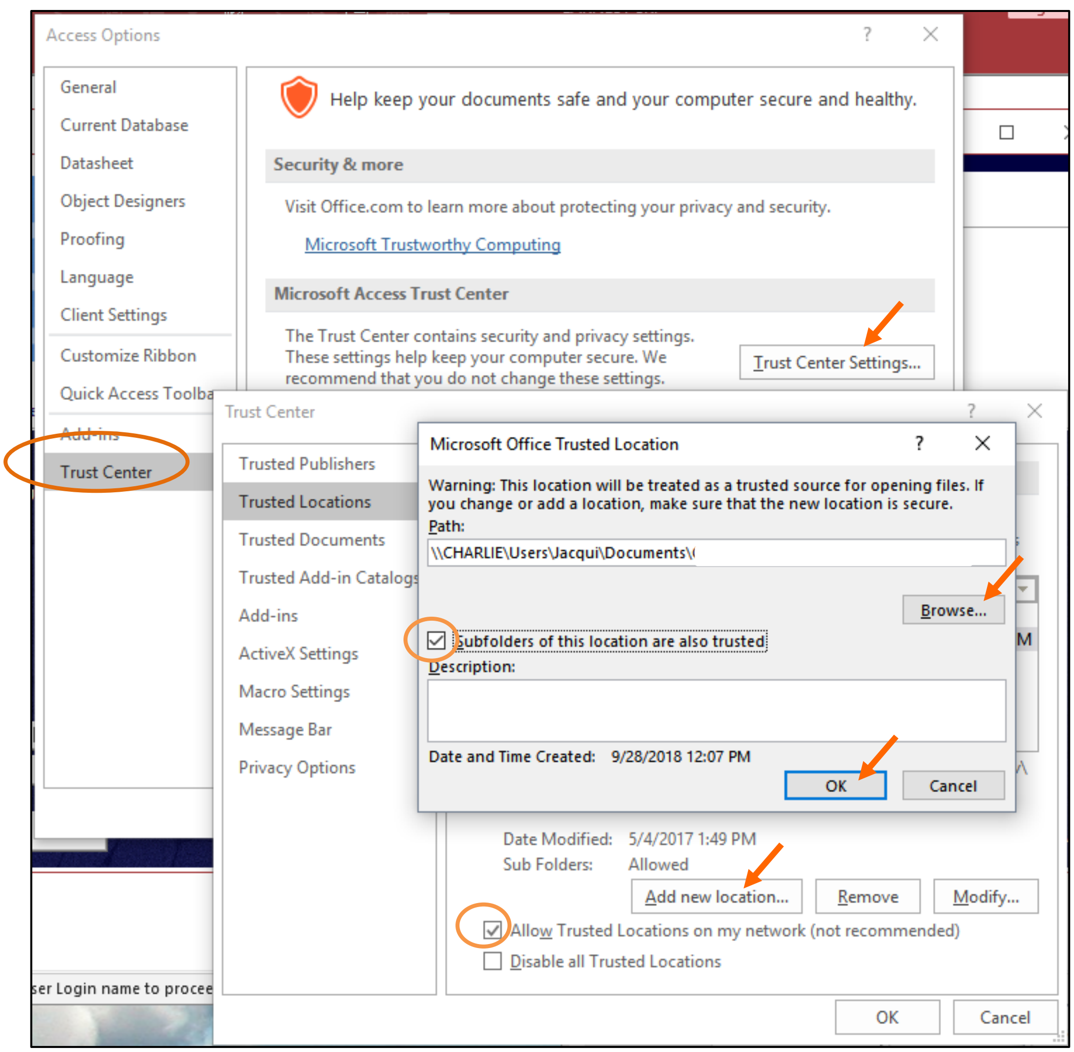
Trust Center - Trusted Location

When the application is first opened, a warning message may appear, indicating that it '*May be unsafe to open the file*'. This is a standard warning for any Access® file that isn't located in a folder that has been designated as a '**Trusted Location'**.

- You can press [**OK**] in order to proceed each time when opening the file;
- Or you can create a '**Trusted Location**' so that the file opens without the warning message.

To add a Trusted Location:

1. Under 'Access Options' select 'Trust Center'; 'Trust Center Settings'; 'Trusted Locations'
2. If the intended location (folder) does not appear in the list, press [**Add new location**], and browse to it.
3. Check the box labeled 'Allow Trusted Locations on my network'.
4. Check the box labeled 'Subfolders of this location are also trusted'.
5. Add any other folders to 'trusted locations' that you plan to save SRP files to (including the 'Earnest Central Files' folder).



Client settings - Advanced

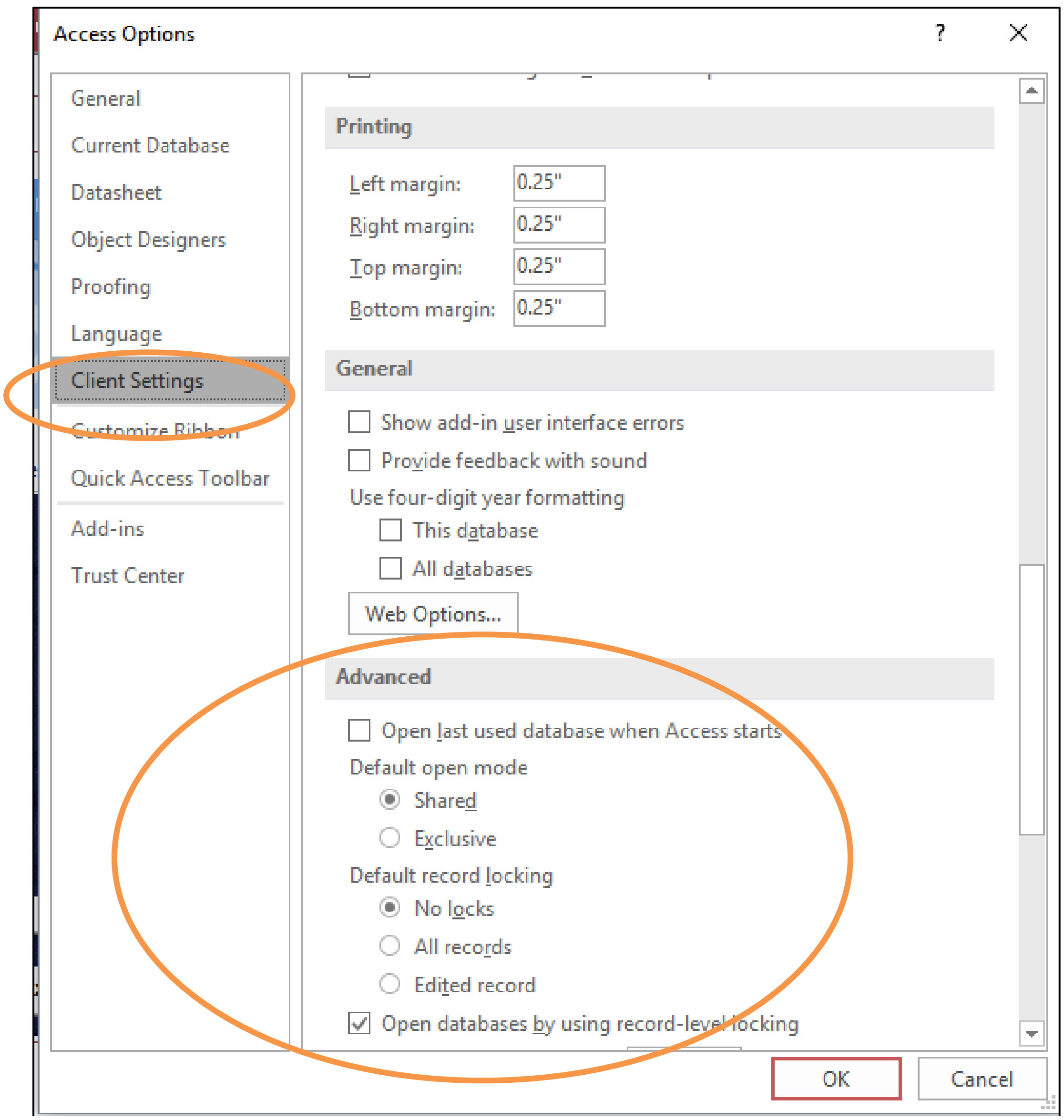
These defaults should not be changed unless there is a compelling reason.

In order to allow multiple users to access a project file simultaneously the

- ‘Default Open Mode’ must be set to ‘Shared’
- ‘Record Locking’ must be set to ‘No Locks’
- ‘Record-level Locking’ must be checked.

To view these settings:

1. In Access ‘Options’ select ‘Client Settings’
2. Scroll down to the section ‘**Advanced**’



Proofing and AutoCorrect

Other settings that can be adjusted include those under '**Proofing'** and '**AutoCorrect'**.

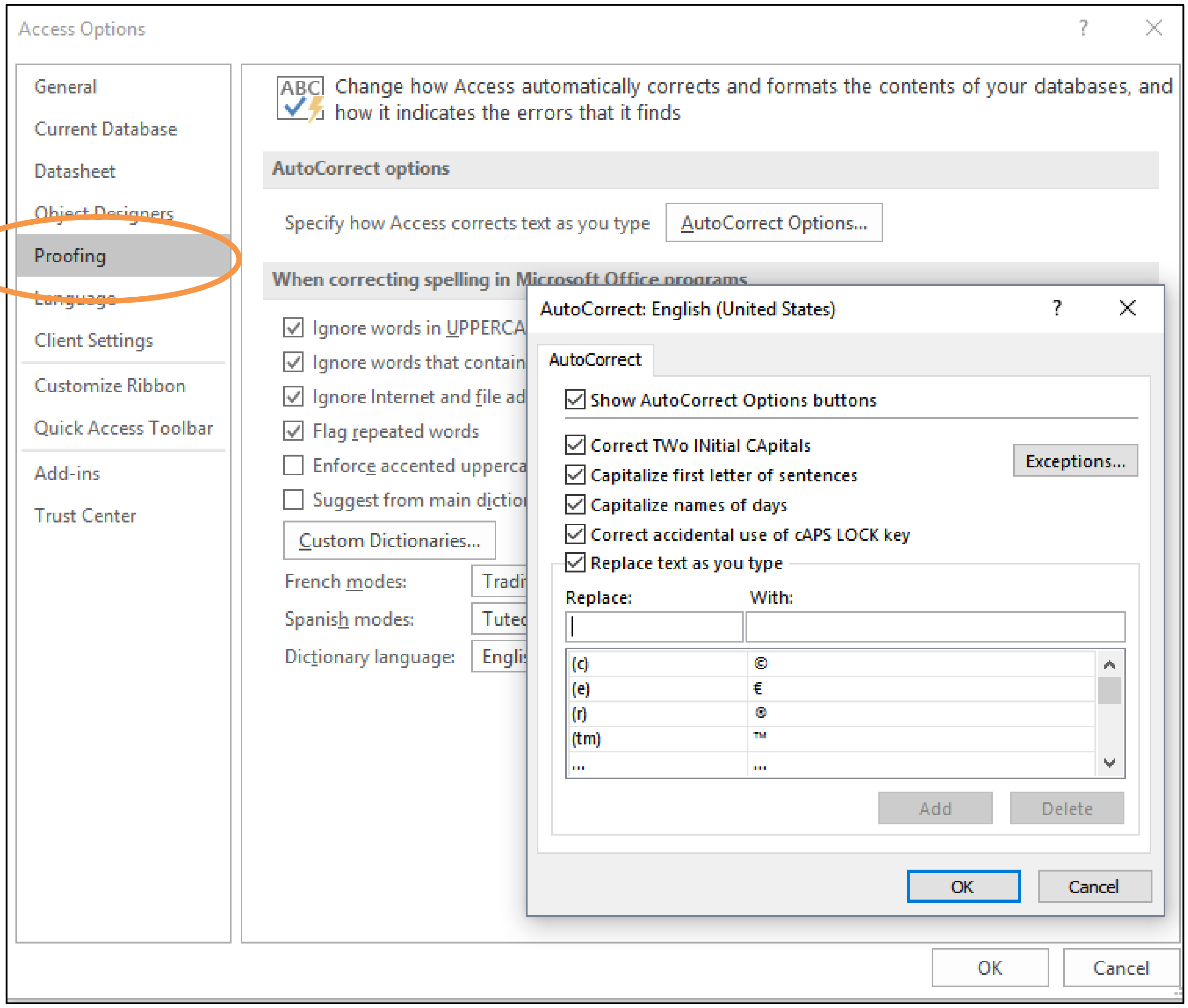
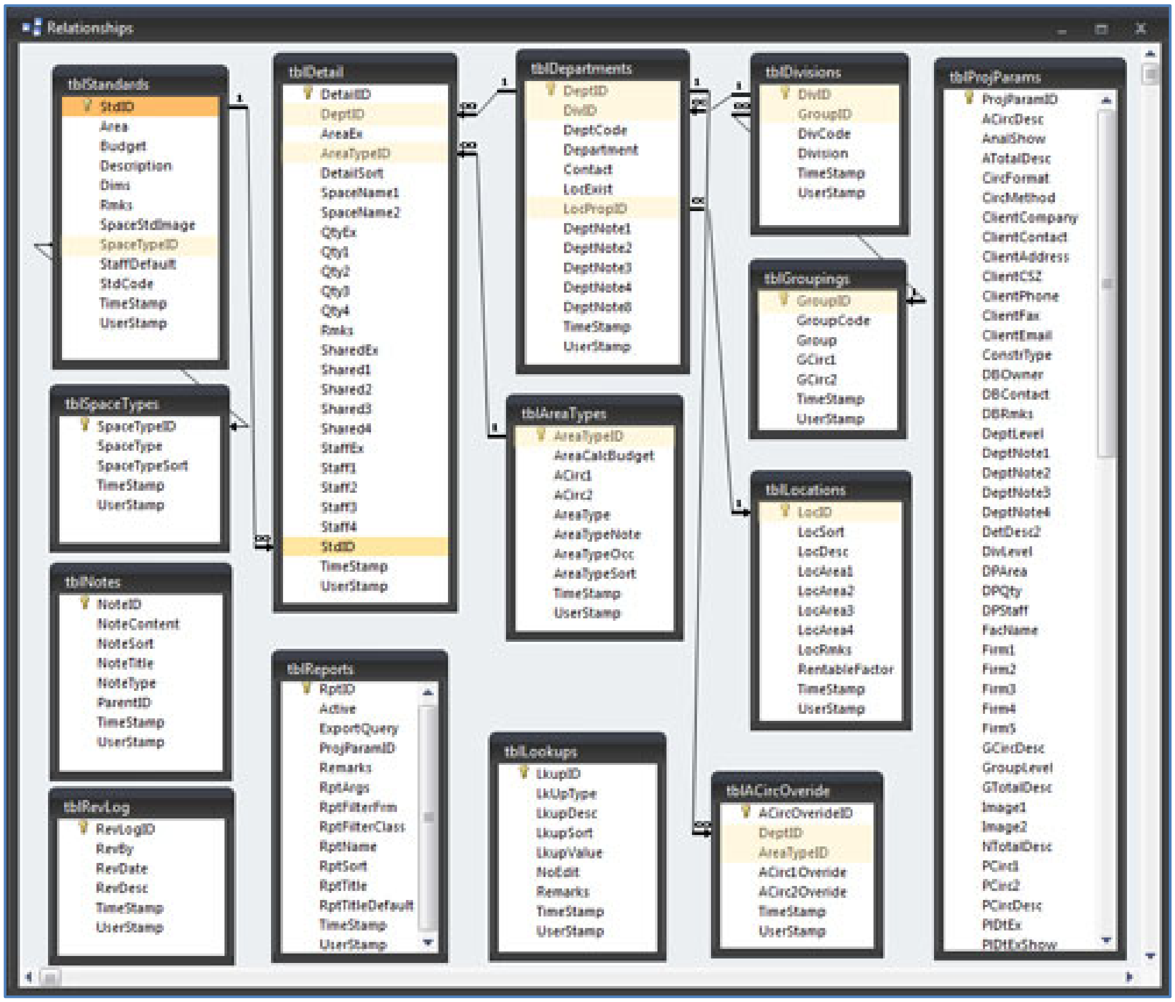


Table Relationships



The **SRP** system incorporates a set of related tables, which are stored in a project data (DAT) database.

1. A unique data ('DAT') file is created for each project. Project data is always in a separate file from other projects.
2. When a project is opened using the 'Project Navigation' screen, the tables for the selected project are linked automatically.
3. All project-specific data is stored in the tables shown below.
4. The entire user interface, including forms, reports and automated linking and updating routines are tied to this database structure. If you add, remove or change tables or their relationships in the DAT file (back end database), the APP file (front end application) will also need to be modified.

Customization

SRP is entirely customizable, users have access to all the extensive sorting, filtering, querying and reporting capabilities provided by Microsoft Access.

While **SRP** incorporates many timesaving features and a sizable range of standard reports, you may at some point want to modify or enhance the application to meet special project needs. All objects, including the VBA code, can be modified, enhanced or added to by any knowledgeable user.

Contact Earnest Development - we can save you hours of time! We're available to assist at any level, provide formal or informal training and provide project-specific services. As the system designer, we are uniquely suited to offer expert advice, quick turn-around and affordable rates.

1. Access® and VBA
    a. **Microsoft Access** is the most widely used database software in the world. The Access development environment is extremely user-friendly and conducive to rapid applications development (RAD). Access solutions often require significantly less code than alternatives, and the Access query designer and report generator are second to none.
    b. If you have in-house technical resources proficient with Access and VBA, they will be able to help you create custom queries and reports, and to import or export data from other sources (like spreadsheets, xml and txt files).
    c. Microsoft Access has an extensive 'Help' library, tutorials and support resources available at Microsoft.com. There are also numerous user groups, web sites, blogs and articles available online and publications available in book stores and libraries.
2. Modifications
    a. Most modifications to forms and reports are done in 'Design View', and /or the VB Code window.
    b. For editors, when in Form view or Datasheet view the user can save the current 'sort', 'filter'. In Datasheet view the user can also save column positions, column width and row height, and in either view the overall Window size. To keep the current view, choose 'Save' from the top menu bar.
        - A change to your Form only impacts the application on your computer (not other users' computers), and will not affect the underlying data or how reports look or behave.
    c. For reports you can change 'Page Setup' (paper size, margins, orientation and default printer default) when in 'Print Preview'. To keep the changes permanently press the SAVE button before you close 'Print Preview' or it will return to the original settings.
    d. When in Design View, you can discard any wrong or inadvertent changes by simply closing the report and when prompted 'Do you wish to Save?' choose NO.
    e. **SRP** incorporates a significant amount of programming (VBA) code behind the scenes.
    f. Any customization of existing tables, queries, forms, reports, macros or modules should be on **duplicate copies** to avoid inadvertent impact on existing functionality.
    g. When testing your modified objects, make sure to test under different conditions, including switching to a different project and changing data and settings in the Settings editor.
    h. The safest way to hide a control is to change controls 'Fore color' property to 'White'.
        i) Deleting existing controls in Forms and **Reports** may introduce errors, so should be avoided.
        ii) Changing the 'visible' property on controls to 'false' may work sometimes, but that property may be re-set at run-time in VBA.
    i. Changing the layout, fonts and headers and footers.

i) When moving controls around it's a good rule to stay within the section. This will help to avoid run-time errors.

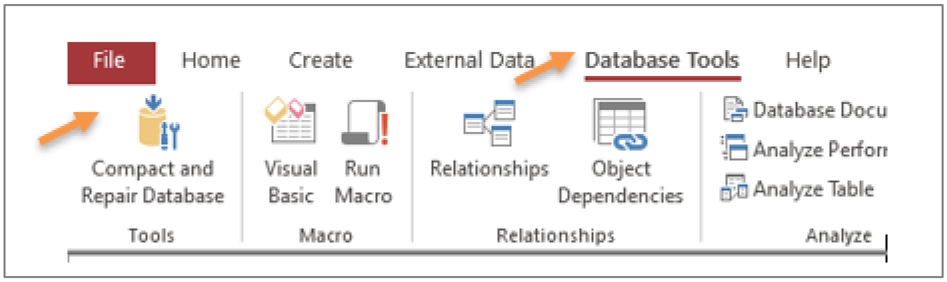
j. Changing the properties of existing controls should be tested on a few controls first, to make sure that the size of the control (or the way it behaves at run-time) is going to work.
   i) Avoid using proprietary and custom fonts. Choose one of the dozens of true-type fonts that come with Windows.
   ii) When changing font sizes, colors, and ‘alternate row’ shading, test how it will look under different circumstances: in print-preview, displayed on a different monitor, when printed on different printers, when photocopied and faxed.
   iii) When changing the font size on an existing control, the overall height and width of the control may need to be adjusted (but it won't automatically adjust. One quick way to manually re-size is to double-press on it.

System Maintenance

As with all computer files it is essential to maintain **BACKUP** copies of all important files. Database files can and do get misplaced, damaged and overwritten from time to time.

- Know where your project files are located.
- Make sure your project files are routinely backed up.
- Keep only one master copy of your project file in the ‘Active’ project directory (move all copies and backups to a directory named ‘Backups’ or ‘Superceded’).

1. The **application file** (SRP20App.accdb) can always be re-installed using the setup files provided at the time of purchase, however, if you have customized or added new queries or reports to your application, these will not be included in the standard set-up files.
   a. Make a backup of the application any time customization is done.
   b. Maintain a ‘Vault’ database in your Earnest Central Files folder to store copies of any custom objects you have created. This will keep them organized, make them available to others, and make it possible to restore them to a new copy of the application file.
2. **A project data file** (like ‘myprojectABC.accdb’) is created for each new project.
   a. Project files should always be located on a server that has a routine back-up.
   b. Restoring a back-up file isn't always easy, so familiarize yourself with the procedure:
      i) Know how to contact the network administrator;
      ii) Understand the backup schedule;
      iii) Learn what the procedure and turnaround time for restoring a file;
   c. When in doubt, or if you have chosen to store your project files on your local (c:) drive, you must make your own backup of any active project files on a routine basis. Save it to either to a separate network drive, a CD or a flash drive.
3. **Compact** and **Repair** your Project data file periodically. This will keep the file size and performance optimal.
   a. If you have made design changes to the Application file (APP), or if you notice that it seems sluggish or has grown in size considerably since it was installed, then you should Repair and Compact the APP file.
      1. In the Access menu select select ‘**Database Tools’** and press ‘**Repair and Compact**’.



2. In earlier versions of Access: From the top Menu Bar select 'Tools';'Database Utilities'; ' Compact and Repair'.

b. Your Project database file may be set to automatically 'Compact and Repair' each time it is closed. This setting can be changed by opening the file directly in Access (not through SRP) and then changing the setting in 'Access Options'.

end of section I.

Section 2 Essentials for End Users

Basics

Space requirements programming is a pre-design activity; it does not involve determining a layout or establishing a design direction for a project. What it does involve is the investigation and documentation of all qualitative and qualitative information pertenent to the project, so that the planning and design activities can proceed.

Database Application

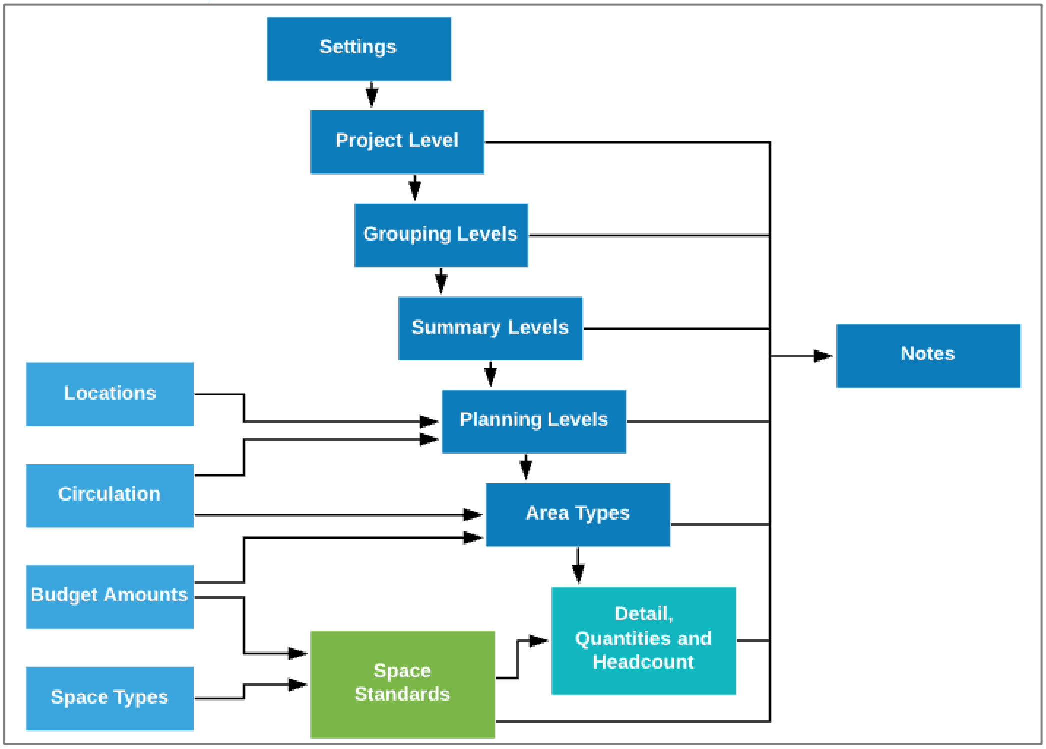
Earnest SRP is a database application, designed to store, manage, and report space requirements information, herein referred to as **data**. The '**quanitative data**' is primarily numeric (staff and space quantities, unit values), the '**qualitative data**' is primarily text (designations, codes, descriptions, notes, comments), and also includes most yes/no data (check boxes). Here is some basic database terminology:

1. **Data** is organized into **the project database file**.
    a. A **database table** contains a collection of records. There are a number related tables in each Earnest SRP project database.
    b. A **database record** is a complete set of fields (also referred to as 'rows') in the database table.
    c. A **field** contains individual pieces of information. A field is also referred to as a 'column', and is similar to a 'cell' in a spreadsheet.
2. A **database file** contains a collection of objects, including tables, queries, forms, reports and modules.
    a. A **query** is an object that pulls information from various tables and assemble it for display in a form or report. An Access query can either be a request for data results from the database or for action on the data, or for both.
    b. A **form** is an object used for editing data, also referred to as a Screen or Editor.
    c. A **report** is an object used to display data in a specific layout, also referred to as 'output' or a 'document'.
    d. A **module** contains **VBA code** that instructs the behavior of forms and reports.

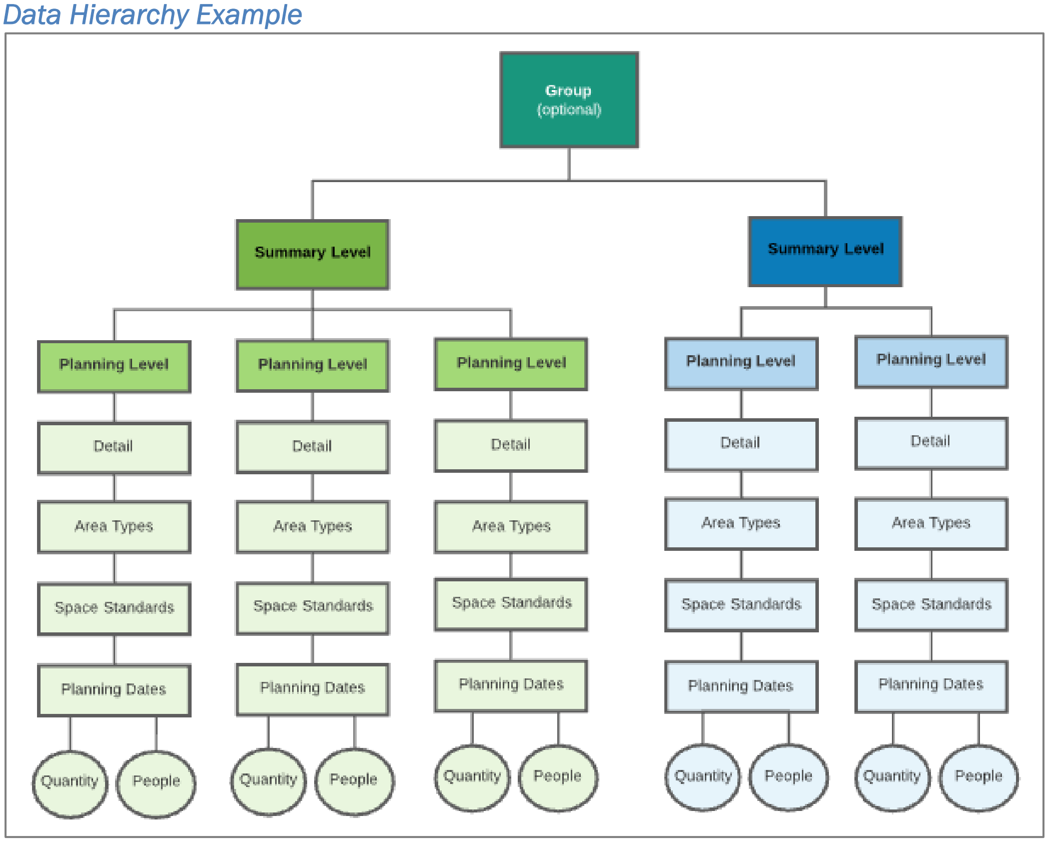
Reports vs Editors

1. In **SRP**, **data is input** by the user through '**Editors'** (aka Screens or Forms).
    a. In Editors you can filter and sort data freely in both '**Form View**' and '**Datasheet View**'. The sorting and filtering done in forms does not affect how the data will be displayed in Reports.
    b. Users should not attempt to print from Editors.
2. In **SRP**, **data is output through Reports** (Microsoft Access® Reports).
    a. In (most) Reports you can filter data using the '**Report Filter**', a pop-up screen that is displayed when the Report is opened.
    b. You cannot do any data editing in a Report.

Data Relationships



Data Hierarchy Example



Projects
Earnest SRP manages information **one Project at a time**. A project in SRP can be defined by the user in various ways. One project might be a single facility with a unique set of requrements. Another project might be a variation or alternate scenario of the previous. Another project may be identified as a 'Template' or 'Sample' Project, and be used to store space standards that might be applicable to similar projects. Each SRP project is stored in a separate file, and cannot be easily split up or merged.

Summary and Planning Levels
The organizational structure you establish for the purpose of quantifying, summarizing and reporting.

Planning Dates
SRP manages data for up to four '**Planning Dates'**. For each Planning Date, **SRP** manages separate quantities for spaces and people. Area calculations (based on the Area of the Space Standard multiplied by Quantity of spaces) are generated for each of the four Planning Dates. In the 'Settings editor' you set the lables for the planning dates, and set which of them are shown or hidden. Planning Dates often identify different milestones (such as 'Move-in'; 'Phase II'; Phase III'), or as scenarios for projections (such as ''5% Growth; 10% Growth'), or as specific years.

Area Types
Area Types play a key role in organizing the detail information, calculations and reporting. A simple project might have two or three Area Types, like 'Workplaces', 'Support Areas' and 'Files and Equipment'. Area types might also be defined as 'High wall areas' and 'Open plan areas'.

Space Standards
Space Standards are the building blocks used by the system to identify and define various spaces, and to calculate ***Area***.

Circulation
The circulation factors you set for your project can represent a considerable percentage of your final area calculations. You can set up to three, cumulative circulation factors for your project.
Circulation factors are known by many names, and used in various ways, so **SRP** provides lots of flexibility. The naming, formatting, display options and the actual multipliers can be set or changed at any point in the project.

Interview and Program Notes
A crucial component of space requirements programming is to thoroughly document the information disseminated in interviews, surveys, meetings, work sessions and charettes. Earnest **SRP** provides structure for these notes and accommodates an unlimited amount of them.

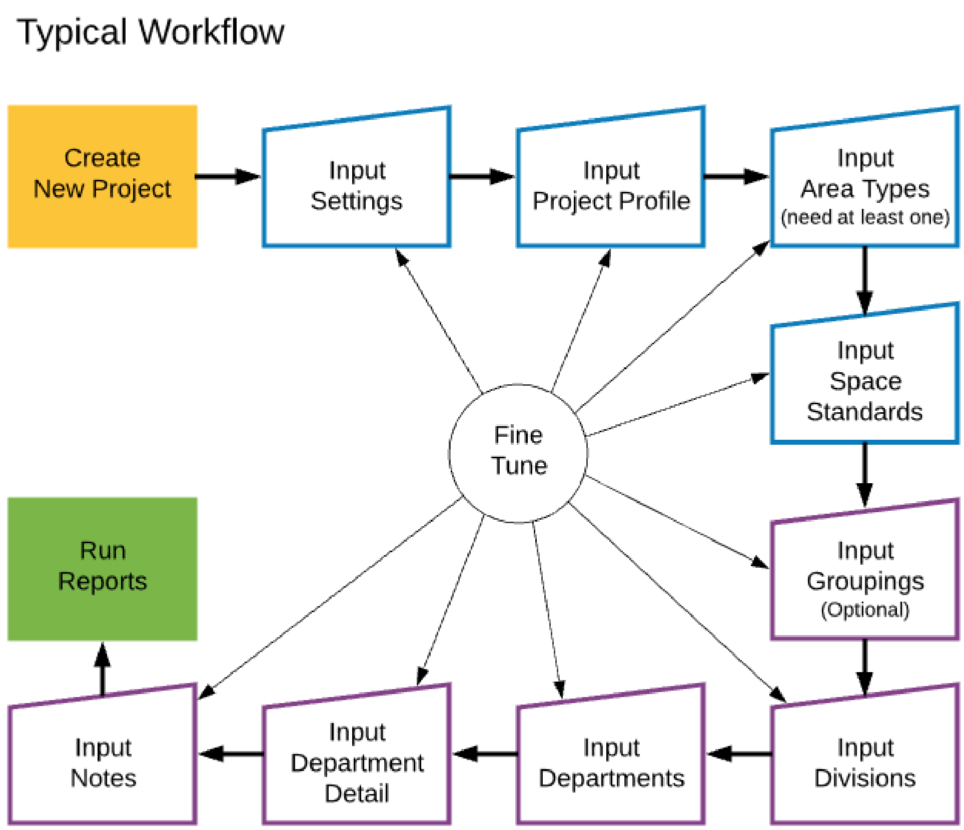
Workflow

SRP is designed to allow multiple people on the team to input, edit and run reports, and do this in any order. The system does not impose a step by step linear process to follow, so that you can be as flexible and responsive as the project demands.

Initial data input should establish:

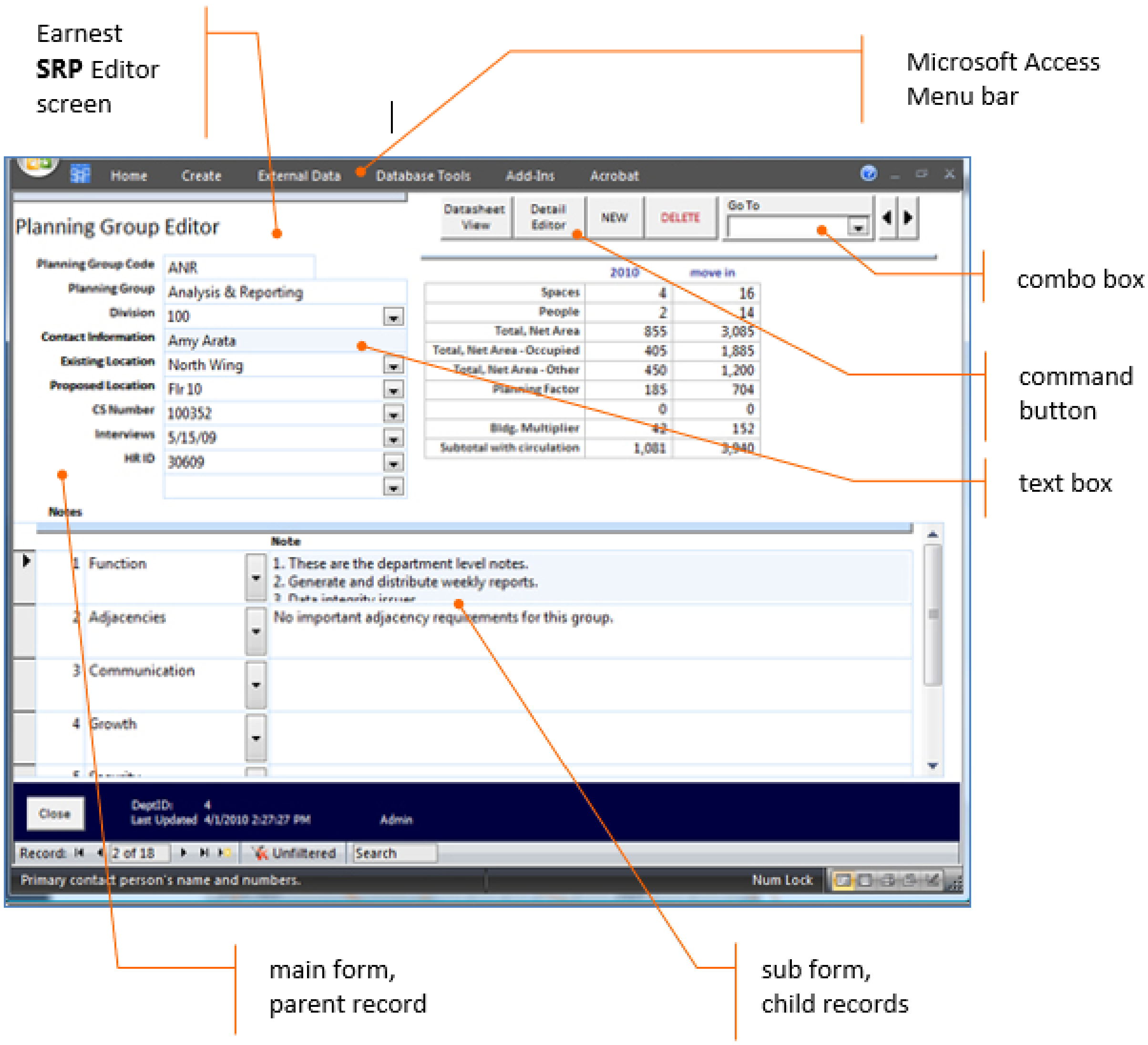
1. Settings
2. Project Profile
3. Area Types (at least one, usually not more than 5-6)
4. Space Standards (at least a few to start)
5. Divisions (one or two to start)
6. Departments (a few to start)

Any of these can be fine-tuned or changed as your work progresses.
See the section '**Getting Started**' for more on this subject.



Using the Editors

The editors in Earnest **SRP** are the tools designed for the end-user to input, change or delete data in the database.
Editors are richly featured Microsoft Access® forms, sometimes also referred to as 'Screens'.
All functionality and data editing in Earnest SRP is accessed through the Main Screen, Editors, and dialog or 'pop-up' screens.
When you open Earnest SRP, the Main Screen is opened in a Microsoft® ACCESS window. You can open almost all Earnest SRP editors directly from buttons on the Main Screen.



Records

Earnest **SRP** editors display either one record at a time, or multiple records at a time.

1. When editing data in a record, that record is saved automatically when your curser moves from it to another record and/or when the screen is closed.
2. In a multi-record editor, each record appears as a row, and the status of that record is indicated on the record selector at the left side of the row.
3. Records that are not active have a solid grey box, with no image displayed.

4. When a record is active, a solid right arrow is displayed
5. When a record is in edit mode, a pencil is displayed
6. An asterisk (*) indicates the row where a new record can be added.
7. The record navigation controls indicate the number of records that exist, and can be used to move from one record to the next by pressing the arrow buttons, or typing in a number in the white space and pressing the [**Enter**] key.
8. If the records have been filtered, the word 'Filtered' will appear next to the number of records.
9. Use the minimize and maximize buttons at the top right of the screen to adjust the size of the screen. Note that the Microsoft® Access window has a set of these, and so does each SRP editor.
10. Use the scroll bars to move up and down the screen, and to see additional records in a multi-record editor. Note that the Microsoft® ACCESS window has a set of these, and so does each SRP editor. Additional scroll bars may also occur when there is a sub-form set into the editor. Scroll bars will only appear in conditions when the form can be sized or in a multi-record editor when there are records not currently visible.

Command buttons and tool tips

Command buttons are found on all **SRP** editor screens - these are controls that launch other screens, or activate an automated routine.

1. The 'Tool Tip' for any Command button is displayed when you place your cursor over the button.
2. To activate the command, place your cursor over the button and single-press.

Tab controls

Tab controls are found on several **SRP** editor screens – these control record filtering and which controls are shown or hidden.

1. Press on one of the tabs to display which records to show according to the category described on the tab label.

Combo boxes

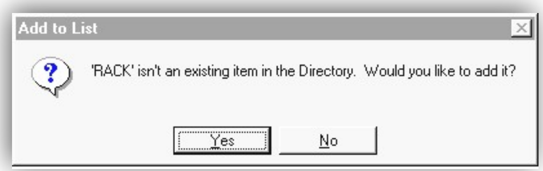
Combo boxes are found in most **SRP** editor screens - these are controls that provide a drop-down list to select values from.

1. In most cases, the combo box list displays unique values found in the current field for your project. In other cases, the combo box list contains values from the 'Items Library'.
2. The list in the combo box is sorted by the [**SortClass**], if any, and the [**Code**], in A-Z order.
3. To select a value, press on the arrow located at the right of the control, or type a value directly into the control.
4. As values are input, the combo box will attempt to find the value in the list and automatically fill in the remaining characters.
5. To remove a value from a combo box control, highlight the complete value and press the [**Delete**] key on the keyboard.
6. There are some combo boxes that are set to accept only values from the list. Most combo boxes have the 'Add to List' feature.

'Add-to-List' feature (combo boxes on editors)

1. If a value typed into a combo box is 'Not in List', a message appears that it is a new value, and the opportunity to add it is offered.
2. If the new value should be added, press the [**Yes**] button. If not, press [**No**].
3. If the value you entered requires additional information, an 'Add to List' dialog box will be displayed to add the additional information.

4. In the 'Add to List' dialog screen, typically the 'Description' is required, and all other fields are optional.
5. After the value has been added to the list, it is available in future instances.



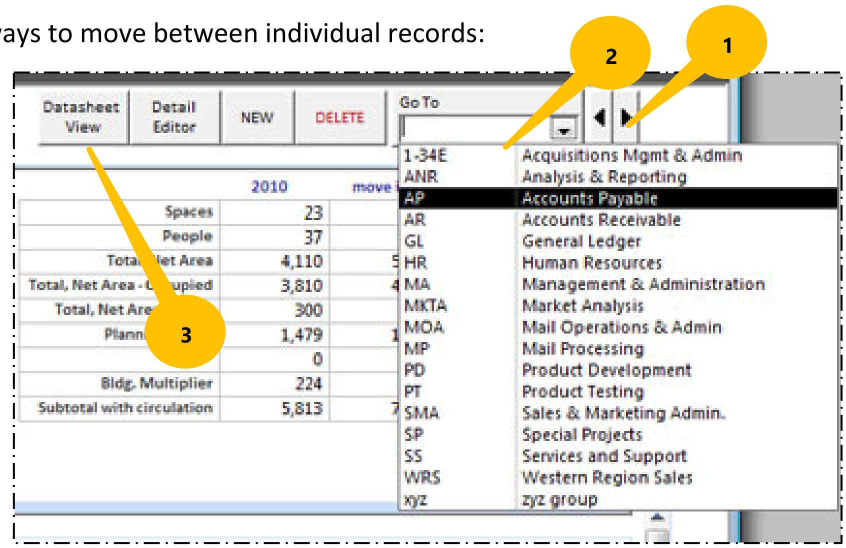
Time Stamp

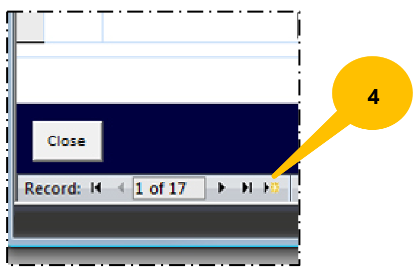
1. The **Time Stamp** is labeled 'Last Update', and is located at the bottom left on most editors, followed by the **User Stamp**. These are not editable by the user.
2. When a record is added or modified in any of the primary tables, the 'Time Stamp' and User Stamp are updated automatically, with the **current date and time, and the current user name**.

Moving between records

In the editor, there are several ways to move between individual records:

1. Use the 'Previous' and 'Next' buttons at the top of the editors
2. Select the record from the GoTo combo box.
3. Or press the datasheet view button.
4. Use the record navigation buttons at the bottom of the screen.
5. Datasheet View Use the record navigators at the bottom of the screen.

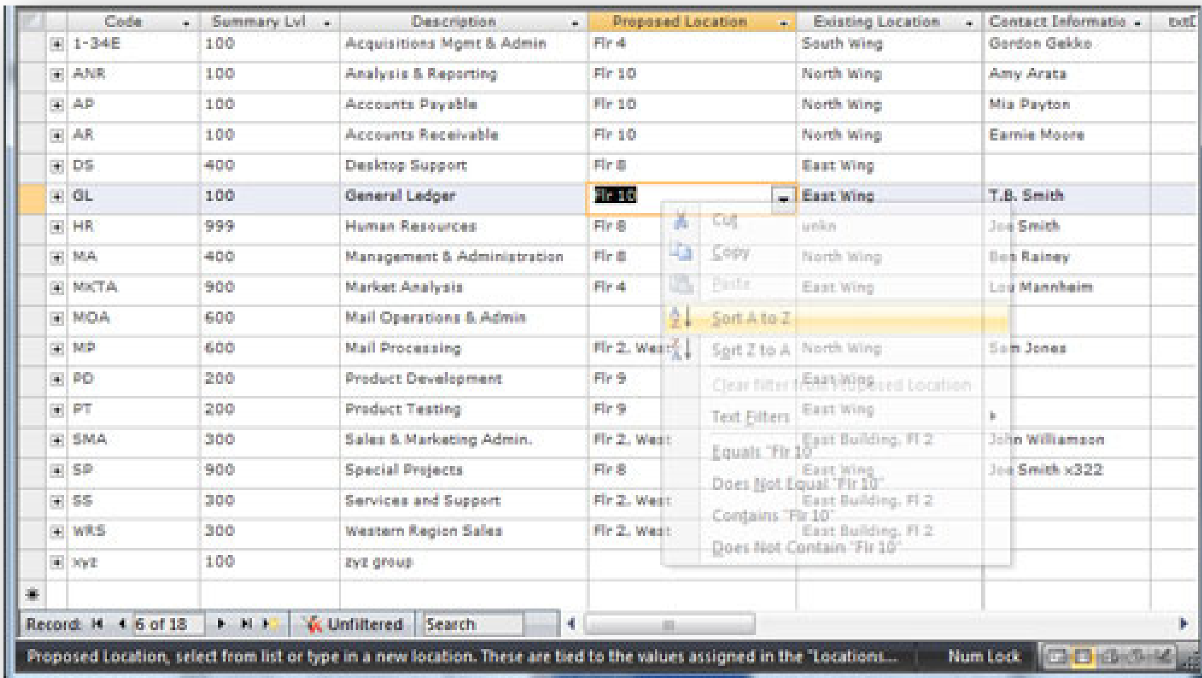




Datasheet View

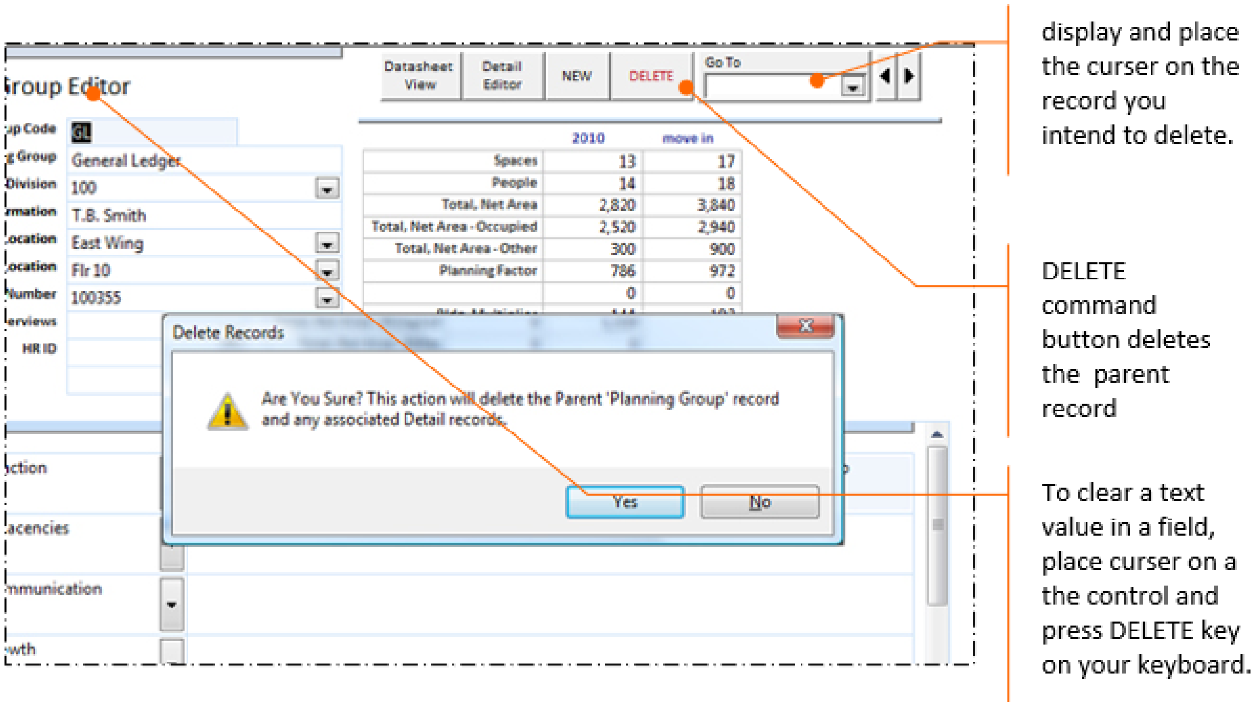
In datasheet view, the form displays records a tabular (table) view. You can edit, add or delete records in this view just as you do in Form view.

1. You can resize the columns or rows to see more data.
2. You can drag columns right or left using the column headers.
3. Right-press on a value, or at the column header to sort or filter the records
4. Dbl-press to select one record and return to 'Form View'.



Deleting Data

SRP contains table relationships that in some cases result in 'cascading deletes'. These conditions should be fully understood by the user before deleting any records.



There is a significant difference between deleting **text** (a value in a Field) and deleting a **record** (a full set of fields):

1. To delete a value in a **Field**, highlight the text and press the Delete key, or cut text by pressing Ctrl + X, which will hold the text in the clipboard for pasting into another record or field.
2. To delete an entire **Record**, first make it the 'active' record:
   a. If the screen you are working in shows multiple records, the record selector (the gray column at the farleft side of the screen) displays an arrow indicating the active record.
      i) Once you have the correct record active, press the Delete command button.
   b. If the screen shows only one record, the record that is displayed is the active record.
   c. If there is a **sub-form** on the editor, it is important to make sure you have the right record selected (either the Parent record or a Child record) and active before you proceed.
3. Once the record is active, press the delete key on your keyboard, or right press the mouse and select 'Delete Record'.
4. The **Delete command button** will always delete the Parent record.
5. Deleting records will in some cases also delete any 'related' records (this is called a '**Cascading Delete**'). This action ensures there are no orphaned records that would fail to report or calculate properly. There will be warning messages when this is the case. Deleting any record should be done only after careful consideration.
6. First consider how the deletion would affect your overall database; rather than deleting, it might be more appropriate to re-name or change it. For example:
   a. If you delete a record from the Space Standards, all instances where the standard was assigned in your project will also be deleted. Consider giving the standard a different [**Code**], [**Description**] or [**Area**] rather than deleting it.

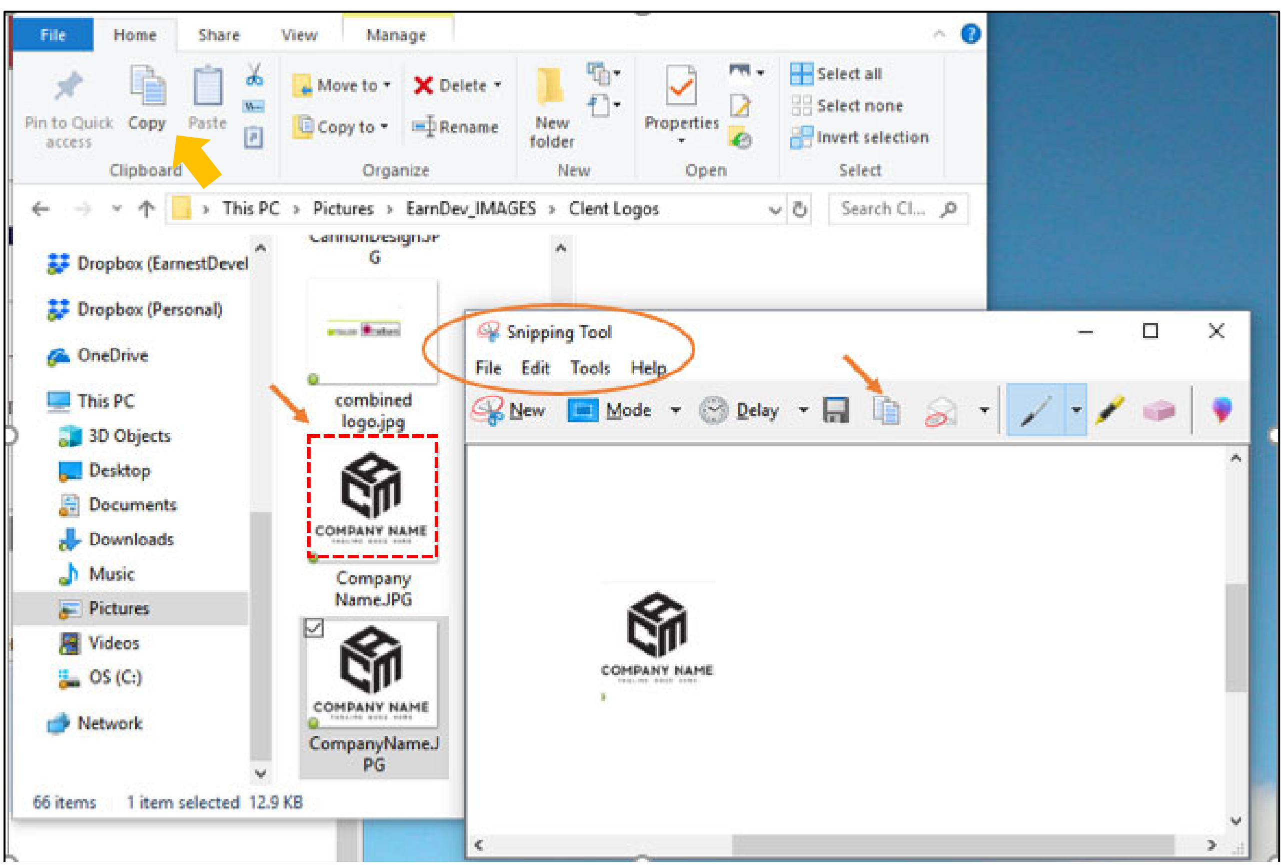
b. If you delete a Department (Planning Group), the detail records assigned under it will also be deleted.
c. If you delete a Division (summary group), the Departments and all detail records under them will be deleted.

Working with Images

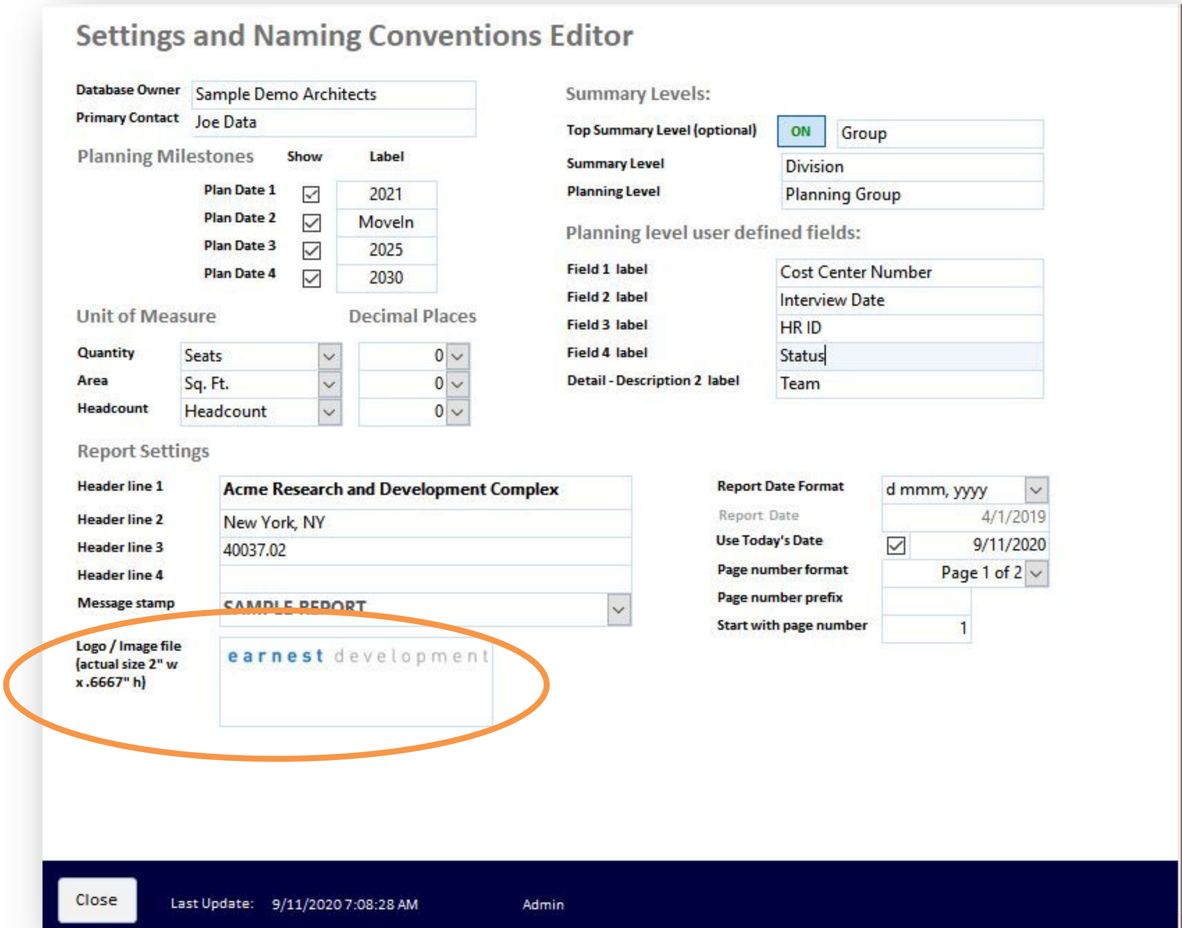
The images you will want to store in your SRP database (the project data file) will include the one to be shown in the report footers (usually a company Logo), and snips of drawings or photos for the Space Standards. The images can be in black and white or color (Images will print out in color only if you use a color printer).

The Windows 'Snipping Tool' is the only method recommended for applying images in Earnest **SRP**, it is very easy to use and will insure the images are the optimal resolution and size.

1. Display the desired image on your screen, either in a Browser or by opening it in image viewer software. It should be zoomed down to a size similar to the box you will be pasting to.
2. Open the **Windows 'Snipping Tool'**, and drag your curser around the area you want to capture to create a 'Snip';
3. Open SRP screen '**Settings**' (for report footers) or screen '**Space Standards Detail**' (for Space Standards).
4. In 'Snipping Tool' toolbar, press the 'COPY' button;



5. In the Earnest SRP ‘Settings’ screen, place your curser on the Image box and PASTE the image into the field.



Keyboard tips

1. Use the arrow keys and tab key to move around the form.
2. When the cursor is on the desired control, type in the text.
3. To accept, press the enter key. This will also move the cursor to the next field.
4. Use the Esc key to undo a new entry or record.
5. To insert the current date press CTRL+SEMICOLON (;)
6. To insert the current time press CTRL+COLON (:)
7. To insert the value from the same field in the previous record press CTRL+APOSTROPHE (')
8. To add a new record press CTRL+PLUS SIGN (+)
9. To delete the current record press CTRL+MINUS SIGN (-)
10. To save changes to the current record press SHIFT+ENTER
11. To switch between the values in a check box or option button press SPACEBAR
12. To insert a new line in a text box press CTRL+ENTER
13. To copy a selection of text, select it with the cursor and press CTRL+C
14. To paste a selection of text, select the destination with the cursor and press CTRL+V
15. Mouse: Point the cursor at the desired control and press to anchor the cursor.
16. Copying text is accomplished in a variety of ways, much like other Windows applications. In addition to the method described above using the keyboard you can also use the mouse:
    a. Highlight the source text; right press the mouse and select Copy;
    b. Move the cursor to the destination; right press the mouse and select Paste.

Getting Started

Preparation

The order in which you enter data in **SRP** is relatively unimportant. It is important that you be organized and consistent in the way you enter data. You will want to have a few things prepared prior to beginning data input.

Project documents and reference materials at hand

Collect as many of the documents, drawings and notes you can to make your work session productive. Rough-out an initial set of Space Standards, Area types, Planning Groups and Summary Levels up front to refer to, knowing that these can always be adjusted through the course of the project.

Allow sufficient time to get up to speed

While we have tried to make **SRP** a truly user-friendly product, there are sometimes features that aren't obvious and results that are unexpected, especially for the first time or infrequent user. Meet those deadlines by making a habit of periodically stepping back to preview reports, and by allowing time to experiment with using some of the special features built into SRP to help you be more productive.

A strategy for organizing Planning Groups and summary levels

Your client's 'organizational' or 'reporting' structure is typically much too layered and complex for the purposes of a space requirements program. In **SRP** you work with just 2 to 3 summary levels:

1. Space standards and people counts are assigned to 'Departments' (base, 'Planning Group level').
2. Departments are assigned up to 'Divisions' ('summary Level').
3. (*Optional*) Divisions are assigned up to 'Groups' (top,' grouping level').
4. Each of the three levels can be named as appropriate to your project (ie. 'Business Unit', 'Team', 'Branch' etc.) so there is a lot of flexibility in how you organize your project.
5. The coding system you use determines how data is ordered and subtotaled in reports. You can use any combination of numbers, letters and special characters, which reports use to grouped and sort alphabetically A-Z.

A coding system for Space Standards

You can use any combination of characters, but each code must be unique, and follow a pattern that is logical, compatible with your other project documents, and not so complex that it becomes cumbersome to use. The codes you start out the project with can be changed at any time, in fact one of the advantages of using SRP is that this type of change, while it may affect numerous records, is accomplished by making a single change in one place.

Opening the Earnest SRP application

When the **SRP** Application is opened, the 'Main Screen' will be displayed. There are several ways to open the application, choose the one most convenient for you:

1. Double-press on the **SRP** *desktop shortcut* that was created as part of your installation of **SRP.**

Or from Windows Explorer:

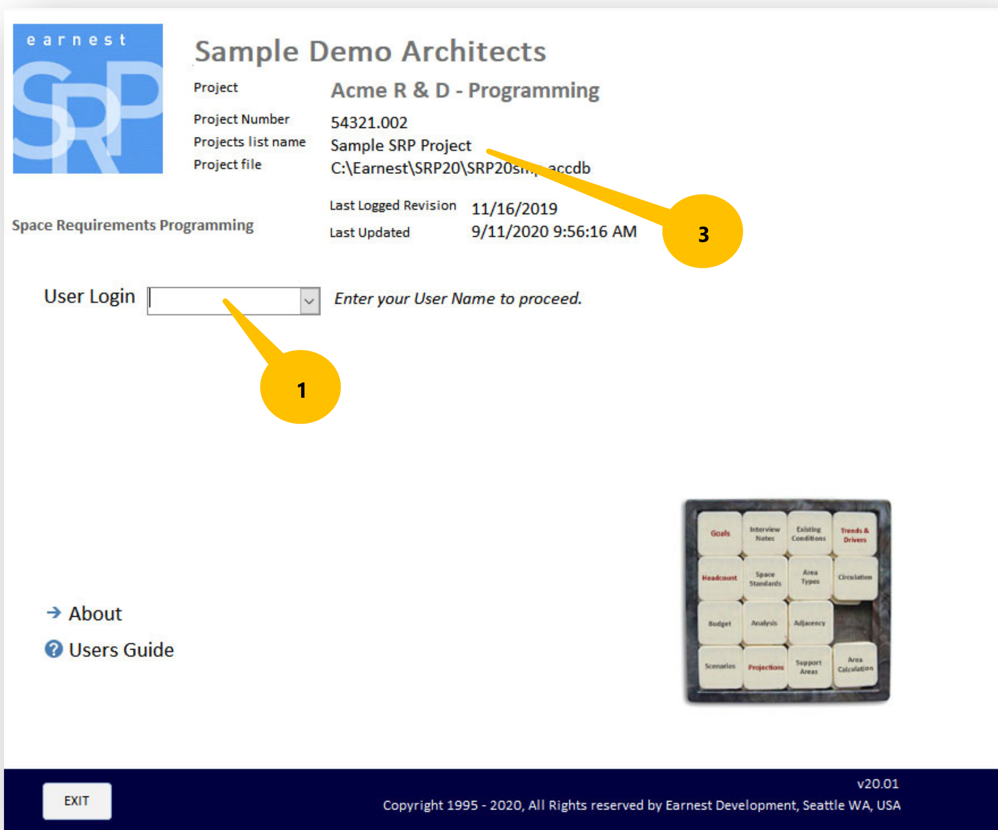
1. Find the directory that contains the **SRP** application file (usually c:\earnest\SRP11),
2. Double press on the file '**SRP11App.accdb**'.

Or from the Windows Start Button:

1. Select 'Program Files'; **Microsoft Access**,
2. Select 'Open an Existing Database'; select '**SRP11App.accdb**'.

The Main Screen

The Main Screen is displayed when the SRP application is launched, and shoud remain open in the background throughout the session.

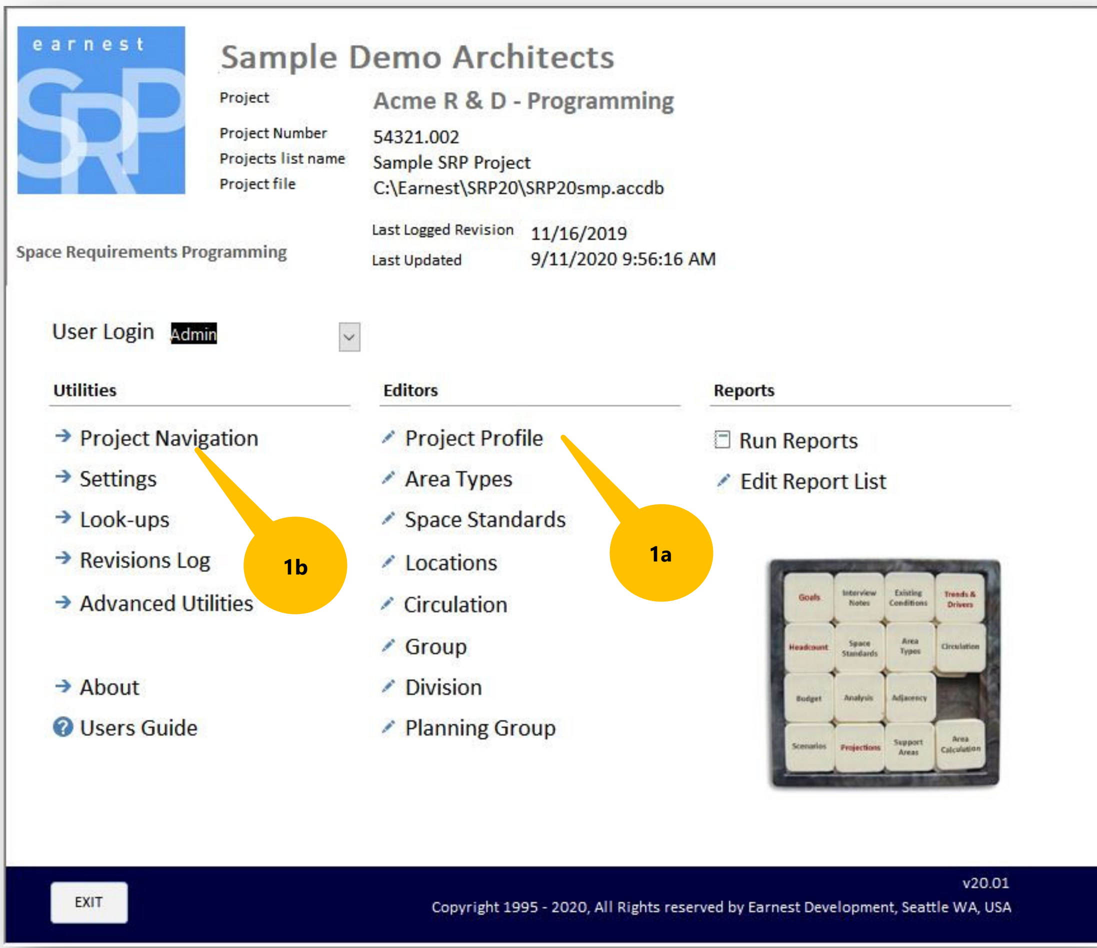


1. The 'Main Screen' is used to LogIn, view project information, and navigate to all other **SRP** screens.
2. When the **SRP** application is first opened, the project that was last open is re-attached automatically.
3. The project information displayed on this screen is for the **Project** that is currently active.
4. If the initial project file has been moved or renamed since it was last opened, the user will be prompted to browse to the new location of the file.

User Name

To begin working, a value must be entered in [**User Name**]. Login values are usually short codes, typically the person's initials.

1. The [**User Name**] is not a security feature. If the value that is typed in is not already in the lookup list, the user is prompted for more information, and then can proceed.
2. The [**User Name**] is used in tracking updates to the project data. The current date and user is updated on the record whenever data is input or modified. This information is displayed as 'Last Updated' at the bottom left corner of most editor screens.
3. Once the [**User Name**] is added, the **Main screen** is fully enabled.



Header section

1. Located in the top section of the **Main Screen**, the information about the current project is read-only here.
   a. The [**Project**], [**Location**] and [**Project Number**] can be edited in the **Project Profile** editor.

b. The **[Projects list name**] is edited in the **Project Navigation** screen.
c. The [**Project file location**] is the location of the back-end project data file.
d. The [**Last Logged Revision**] is the most recent date found in the **Revisions Log**.
e. The [**Last Updated**] is the most recent timestamp found in the project data (the last time a record was edited).

Utilities section
(bottom section, left)
1. Press the [**Project Navigation**] button to move between projects, or create a new project.
2. Press the [**Settings**] button to view or edit the project settings.
3. Press the [**Lookups**] button to view or edit lookup values and adjust the sort order of choices that appear in combo boxes.
4. Press the [**Revisions Log**] button to view or edit information about updates or revisions to the data, dates when documents are issued, and other project milestones.
5. Press the [**Advanced Utilities**] button to open the **Advanced Utilities** screen.
6. Press the [**About**] button for information about **Earnest Development**, **SRP** and the version you are running.
7. Press the [**User's Guide**] button to view the **Earnest SRP User's Guide** (this document).

Editors section
(bottom section, middle)
Buttons in this section launch the screens that allow you to create, view, or edit your project data.

Reporting section
(bottom section, right)
Buttons in this section launch the screens that allow you to view and print reports and edit some of the report settings.

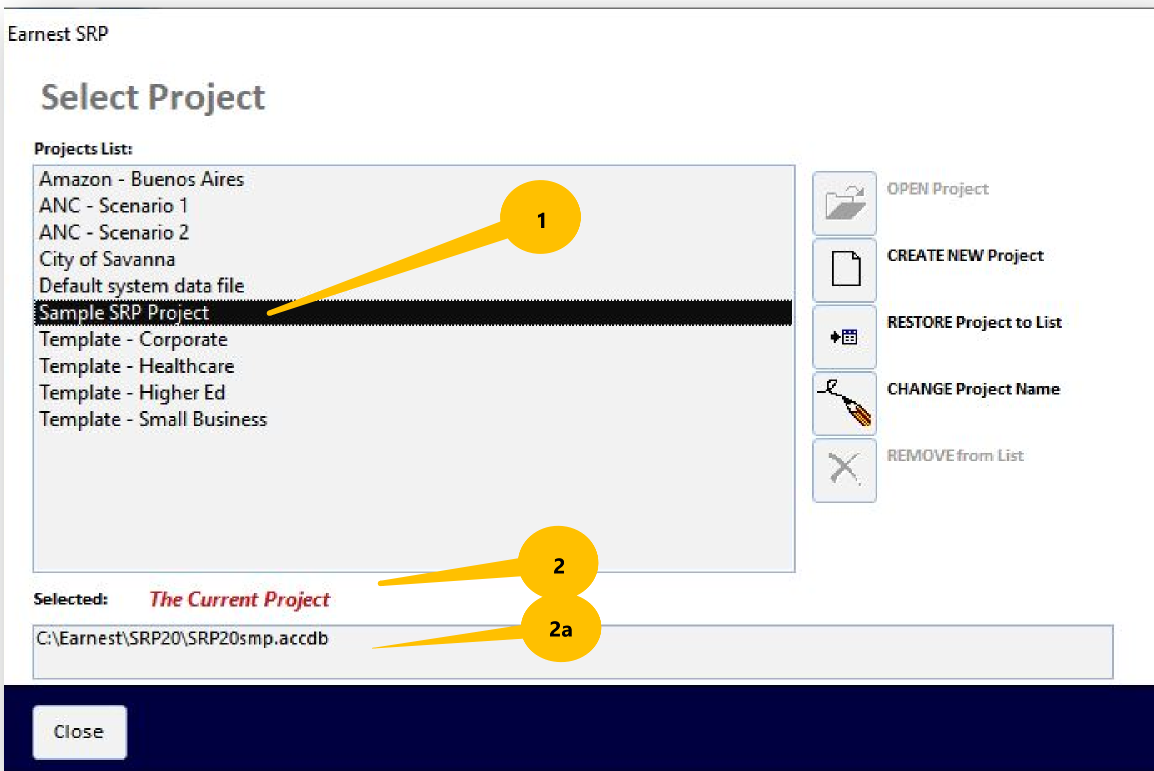
Version number
(bottom right corner)
The application version and release number.
1. All users in your organization should be using the same version and release number.
2. Always provide the version and release number when contacting Earnest Development for support services.

Project Navigation

Create new projects, move to different projects or edit your projects list.

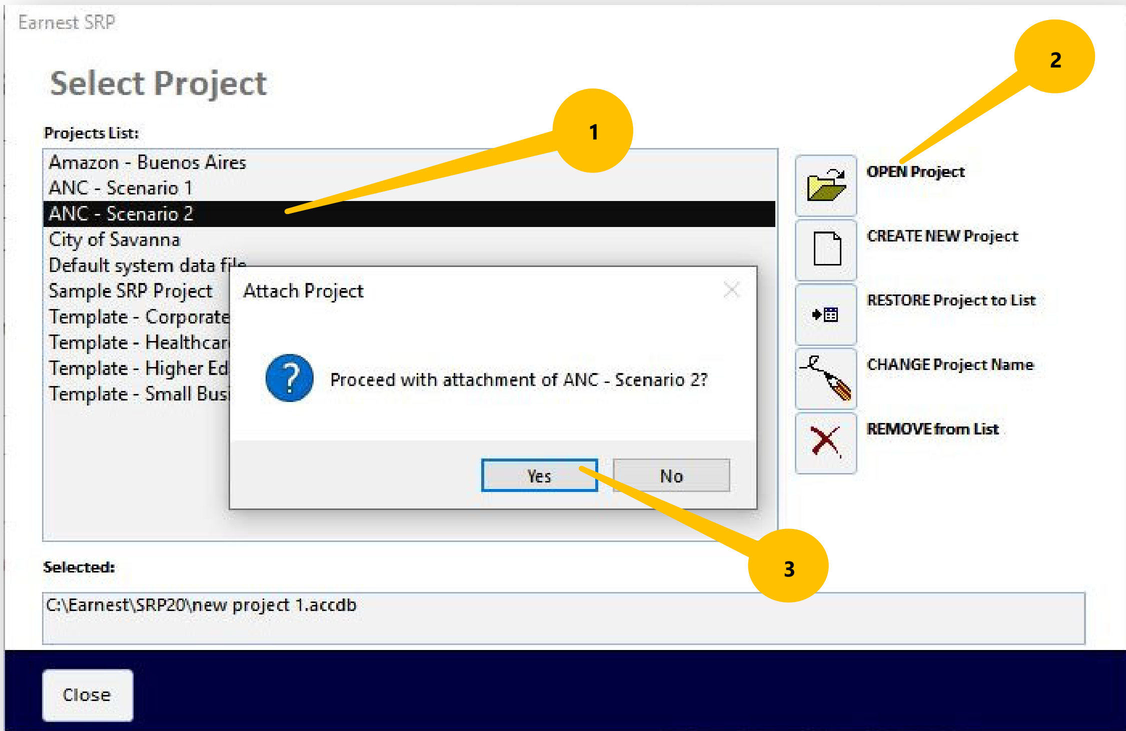
Select Project screen

From the Main Screen, in the Project section, press the [Project Navigation] button.



1. **The Projects List** is a list of all projects that you can move between, work on and generate reports from.
    a. In a typical installation of **SRP**, a Project Navigation file (SRP11PROJ.accdb) is installed on each user's machine, therefore the Projects List displayed is unique for each user.
    b. A project will initially be listed only in the 'Projects List' belonging to the user that created it.
    c. In a multi-user networked environment, users can add projects created by others (when stored on a shared server drive) by 'Restoring' the project
2. **'Selected' and 'Current' indicators** are non-editable fields on the bottom of the 'Project Navigation' screen**:**
    a. When you first open the 'Project Navigation' screen, the current project file path & name are displayed as 'Selected' at the bottom of screen, and the 'Current Project' message displayed.
    b. When you highlight a different project in the list, the path & file name for the highlighted project is displayed, and the 'Current Project' message is no longer displayed.

Open Project



When you Open a Project, an automated routine is launched. The links to the project data you are currently attached to are removed, and the project you have selected in the Project List is linked.

1. In the **Project Navigation** screen, highlight the desired project in the 'Projects List'.
2. Press the [**Open Project**] button (or dbl-press on the item in the list box)
3. A confirmation message will be displayed, press the [**YES]** button to proceed, or [**NO**] to cancel.
4. A message will be displayed when the project attachment is complete.
5. Moving between projects usually takes just a second or two, depending on your PC and/or network performance. If you experience an unusually long delay (more than a 10 seconds) it may be caused by a problem with your network connection, network performance, the server and/or the specific folder you are trying to access.
   a. To cancel out of the action press the [Break] key on your keyboard.
   b. To test for network-related issues, try to create and save a simple Word or Excel document to the exact same location. If this fails your network administrator will be able to resolve the problem.

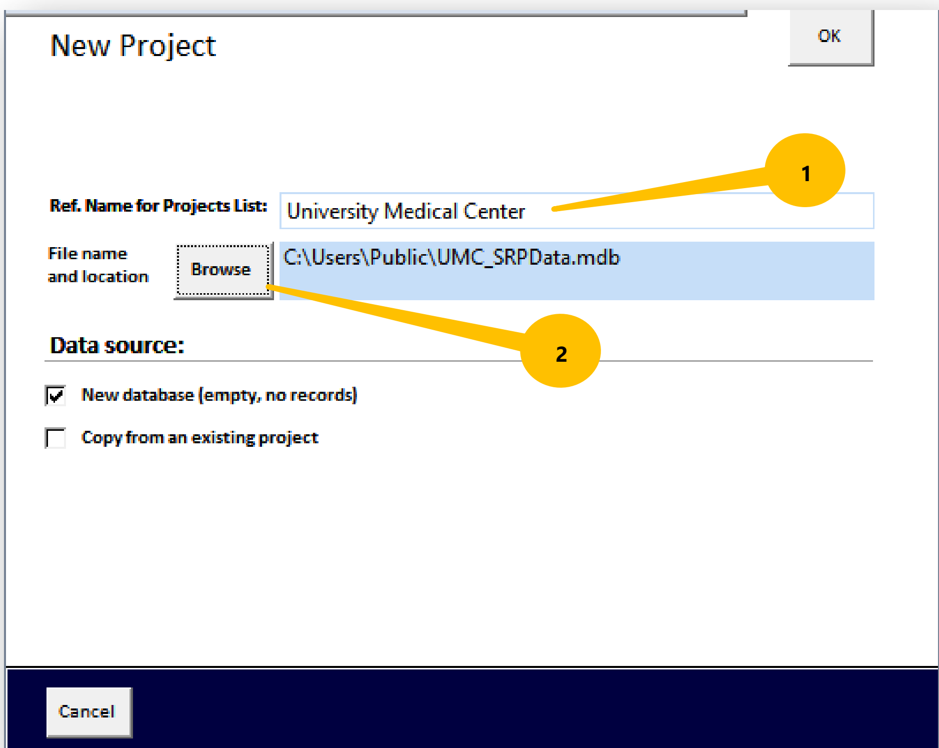
Remove from List

When the list of projects becomes crowded with project names you no longer want to see you can selectively remove them from the Project List. When you remove a project from the List the actual file is not deleted, and can be added back to the Projects List (see 'RESTORE Existing Project')

1. You cannot remove a project while it is open. To remove the 'Current Project', you must first move to (Open) a different project.
2. In the 'Project Navigation' screen, highlight the desired project in the 'Projects List'.
3. Press the [**Remove From List**] button.
4. A confirmation message will be displayed, press the [**YES]** button to proceed, or[**NO**] to cancel.

Create New Project

In the Select Project screen press the [**Create New Project**] button

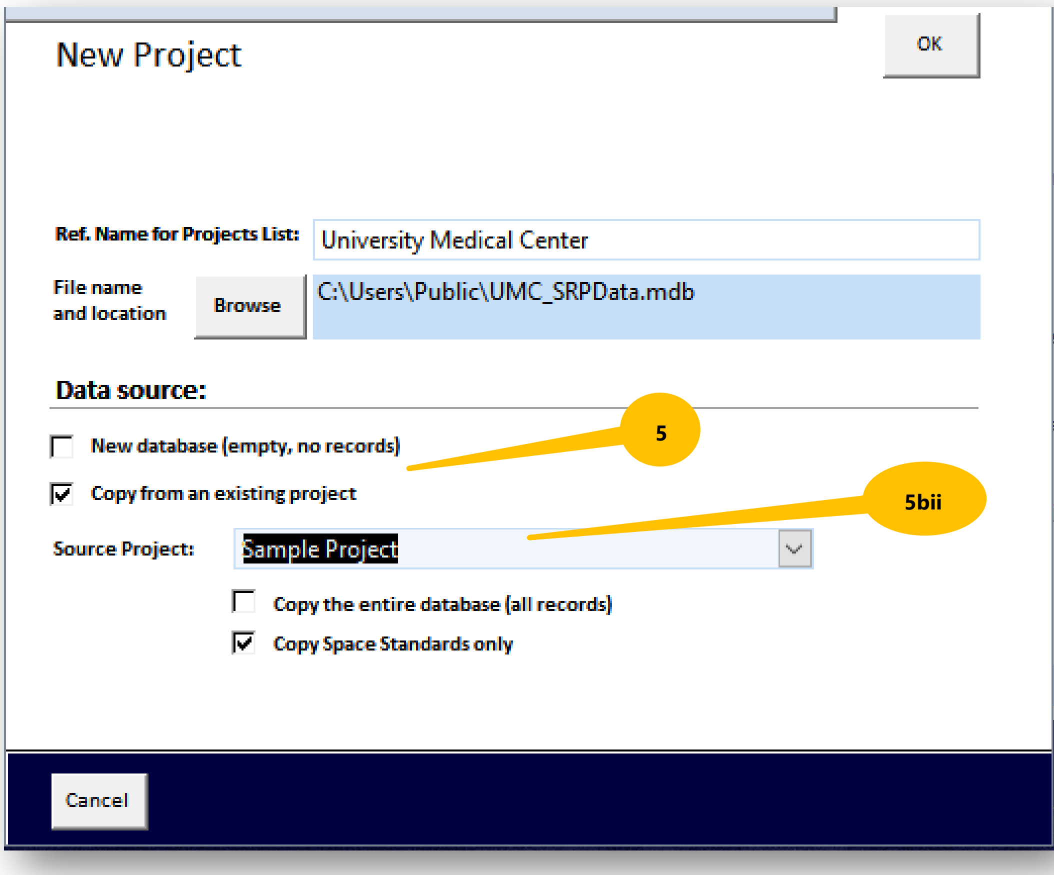


New Project screen

1. In the New Project screen for [**Name for the Projects List**], enter a simple reference name and press the **Enter** or **Tab** key.
2. For [**File name and path]** press the [**Browse**] button
3. In the [**Save File**] (Browser) window, find and select the directory you wish to save the new project file

   a. In most cases the file should be saved to your Project directory on a shared server, so that it is being routinely backed up, and so that it can be accessed from other machines or by other users (according to network user permissions).

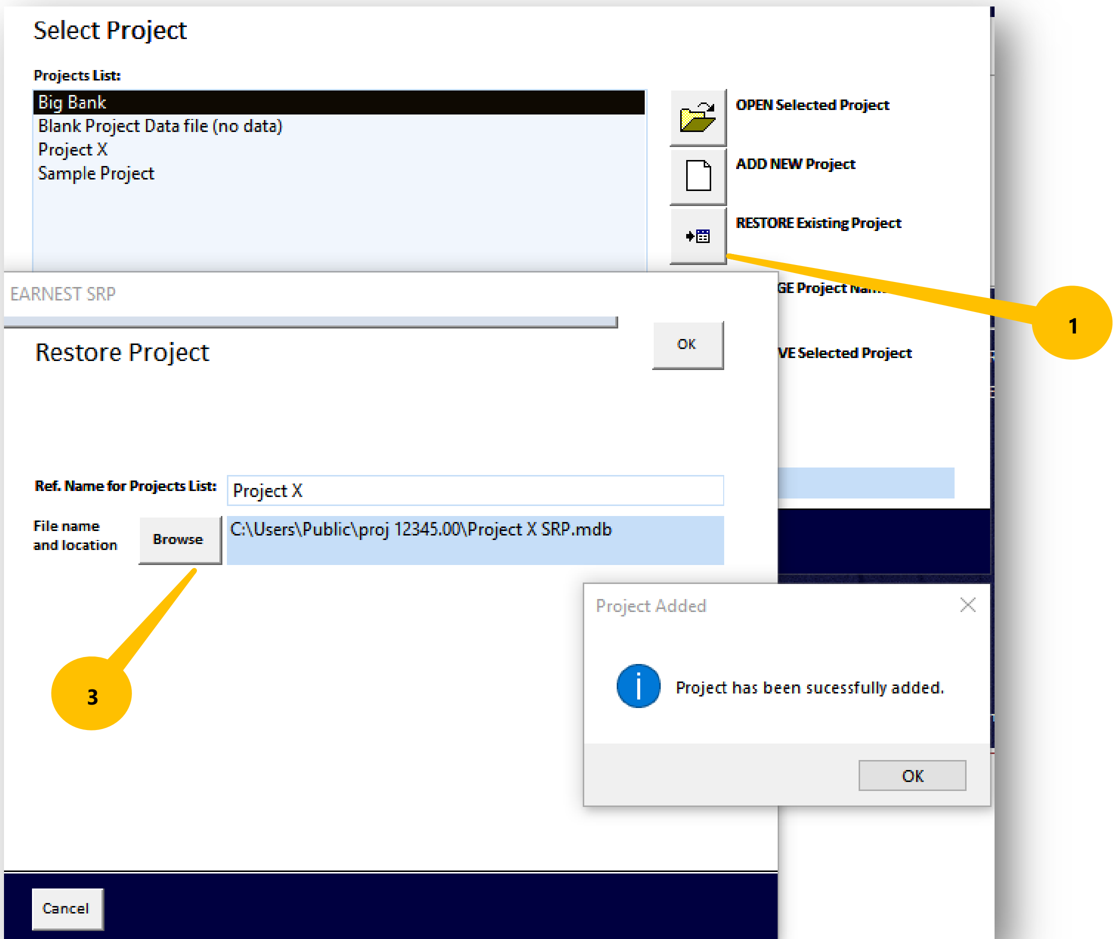
4. Enter a name for the filePress the [**SAVE**] button. The Browser screen will close and return you to the New Project screen.



5. Data Source
   a. Choose **'New Database'** to create an empty (shell) file for your new project, with only essential system data included.
   b. Choose '**Copy**' to create a project using some or all of the data from an existing **SRP** project or template file.
      i) Check the box [**Copy from an existing project**]
      ii) Select the [**Source Project**] you wish to copy from
      iii) Check the option box that applies:
         (1) 'Copy the Entire database'
         (2) 'Copy Space Standards only'
   c. Press the [**OK**] button. A message will be displayed when the action is complete, and the name of the new project will be added to the Projects List.
   d. When you are finished with adding new projects, close the '**New Project** screen and [**OPEN**] the new project you want to work on.

Restore Existing Project

From the 'Main' screen, press the 'Project Navigation' button.



Restore Project screen

This allows you to add an existing **SRP** project or template file to your 'Projects List'. Once it is in the Projects List you can open it or copy data from it when creating a new project.

1. In the **Project Navigation** screen, PRESS the [**RESTORE Existing Project]** button.
2. Enter a [**Project Name**] (this is the name that will be displayed in the Project List on the 'Project Navigation' screen).
3. For [**File name and path]** PRESS the [**Browse**] button
    a. In the [**Locate File**] window, browse to and select the file you wish to restore.
4. Press the [**OK**] button.
5. The project is now added to the **Project List**.

Moving a project file to a different location

Once a project has been created, the directory path and file name are stored in **SRP** so that you can easily navigate to it (see 'OPEN Selected Project').
If you need to move the project file to a new location, this is accomplished using **Windows Explorer**. In the SRP application, an existing link to the old location will interfere with establishing a link to the new location, so it is important to follow these steps:

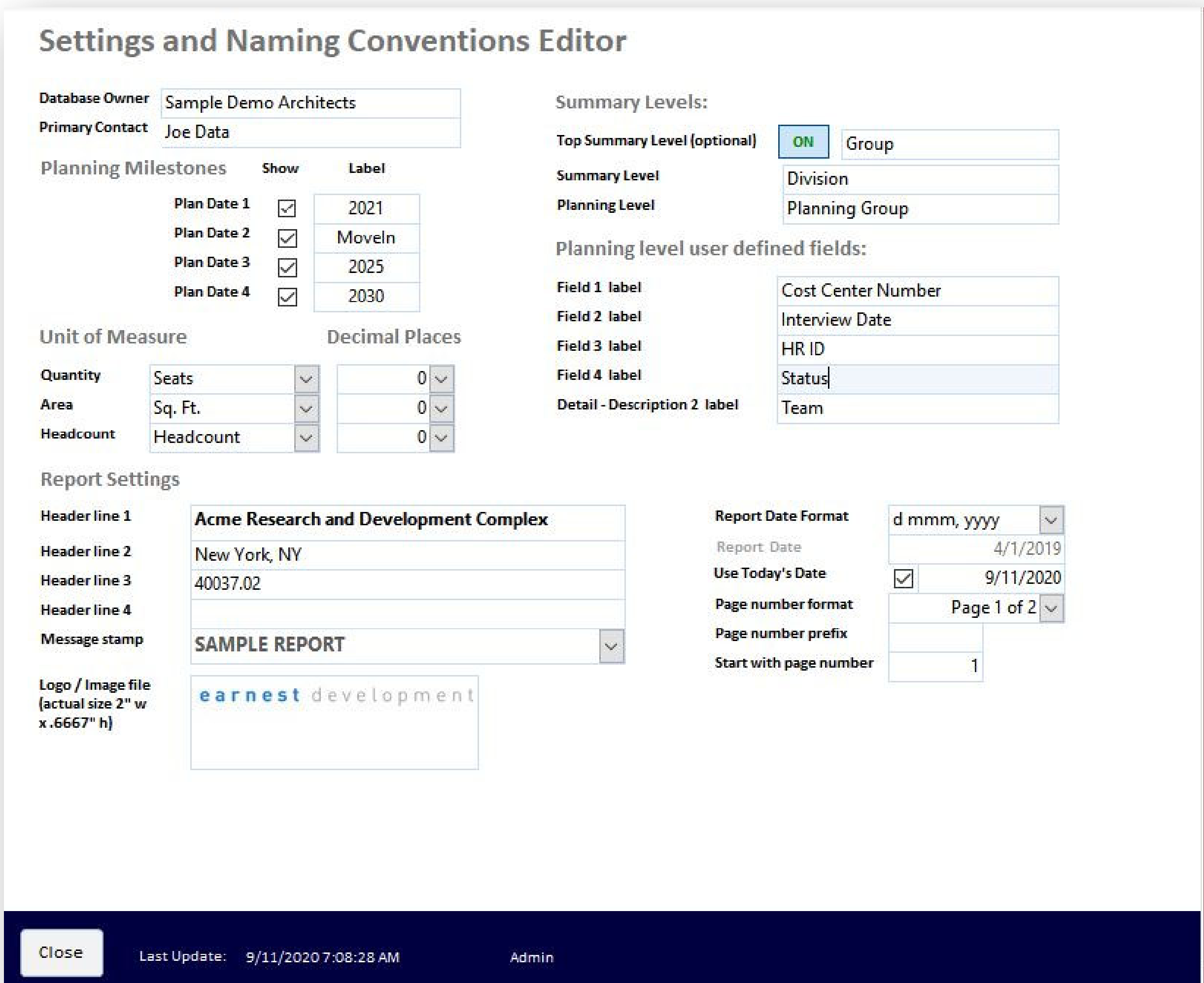
1. Confirm that the location you intend to move the file to is accessible to the appropriate people, and that permissions are set to 'Read/Write'.
2. In the **SRP** 'Project Navigation' screen,
   a. Open the '**Sample Project**' (freeing up the project that you wish to move)
   b. Select the project you intend to move, and press the [**Remove**] button to it clear it from your '**Projects List'**.
3. **In Windows Explorer**, move the project file to the new location.
4. 'Restore' the project (bring it back into your '**Projects List'**), by pressing the [**Restore**] button, giving it a name, and browsing to the new location.

Project Data Editors

Settings and Naming Conventions editor

From the **Main screen**, in the '**Utilities'** section, press the [**Settings**] button.

In this editor you establish overall settings and naming conventions for your project and the recurring data elements in your reports.



1. When a new project is created many of these fields will have default values, and others will be blank.
2. These control much about how the screens and reports in **SRP** appear, how some fields are labeled, formatted, and shown or hidden.
3. Settings and naming conventions can be changed at any time to adjust how an editor or report displays your project data.

Database Owner

is the name of the company that maintains the program database. This value is displayed at the top of the Main Screen.

Primary Contact
is the name of the person that maintains the program data.

Planning Milestones
also called 'Planning Dates' The database stores up to four sets of quantities which are typically shown as columns that can be named and turned on or off to suit the project and reporting needs

1. 'Show' checkbox: check if the planning date is to show on editors and reports or un-check if it is to be hidden.
2. 'Label' textbox: assign an appropriate value to describe the planning date - it can be descriptive like 'Move-In' or a year like '2023'.

Unit of measure
There are three units of measure managed by the database. For each, specify how you want the unit of measure described, and the number of decimal places to be displayed. Select from one of values in the combo box, or type in a new value (the combo list values are edited in the Lookup Lists editor).

1. Quantity: is the count of individual rooms or spaces.
2. Area: is the calculated area - like 'Sq. Ft'. or 'm2'.
3. Headcount: is the count of individual 'people' or 'heads'

Summary Levels
1. Top Summary Level
    a. On/OFF button sets the optional top summary level ON or OFF.
    b. If the Grouping Level is ON, assign a value to describe it. 'Groupings' is the default name.
2. Summary Level: assign a value to describe the summary level. 'Divisions' is the default name.
3. Planning Level: assign a value to describe the base planning level. 'Departments' is the default name.

Planning Level User Defined fields
1. These labels are titles for user-defined fields. The user defined fields can be used for any data that isn't otherwise handled by the standard fields.
    a. If not needed, leave the values blank.
2. The first four user defined fields will be shown in the upper section of the 'Department' (Planning Group) editor, and in the top section of many of the Detail reports.
    a. As in the example shown, the user defined fields can be used for data such as 'Cost Center', 'Interview Date', 'HR ID', 'Existing Sq. Ft.', etc.
3. The detail level label applies to, and further describes, individual positions.
    a. In the example shown, this might be used for data such as 'Name', ''Team' Grade Level', etc.

Report Date

a. Select from several date formats provided.
b. Check the box to use today's current date.
c. Un-check the box to enter a specific report date.

Page Numbering

a. Select from several number formats provided
b. A page number prefix can be set, like a section name or number.
c. Page numbering can begin with a value other than 1.

Report Footer Logo

Insert a company logo or other image file to be displayed in the reports using the **Windows Snipping Tool**. See '**Working with Images'** for more on this topic.

Report Headers

a. Up to four lines can be displayed in report headers.
b. The top line is emphasized in bold as shown.
c. To exclude one or more of the lines, leave those fields blank.

Message Stamp

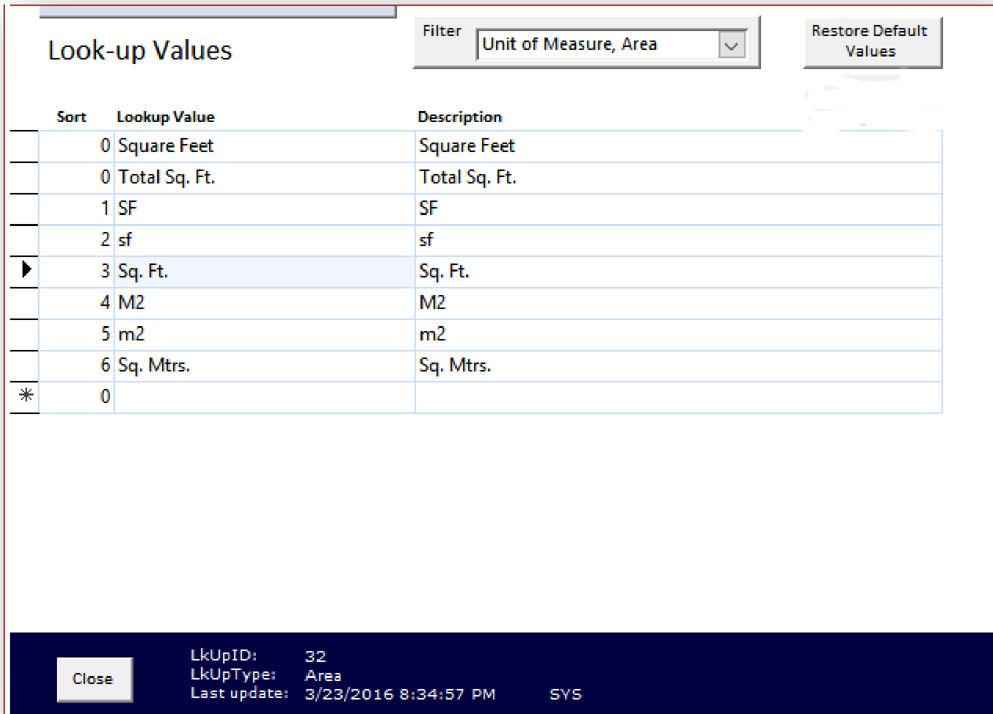
a. Select from several message stamps provided, such as 'DRAFT', 'PRELIMINARY', 'APPROVED BY'.
b. If the message you wish to display is not already in the list, type in the new value and when prompted, confirm 'Yes' and it will be added.

3. Messages provided in the list can be added, changed or removed in the 'Lookups Editor'.

c. Leave this blank if you don't wish to show a footer.

Look-up Values editor

From the **Main Screen**, ‘Project’ section, press the [Lookups] button.



Many of the editors in **Earnest SRP** have **combo boxes** with pull down lists which the user can choose from or can add to on the fly. When lists grow too long or contain values that are misspelled or otherwise inappropriate, this editor allows you modify the lists.

1. When a new project is first set up, lookups can be added, deleted or edited freely.
2. If a project is well underway, editing the lookups can cause data errors.
    a. Change the [Description], but not the [Lookup Value] (this is the value that may have been stored in other tables)
    b. Don’t delete lookup records that may have already been assigned.
    c. Follow up by opening records that may have been affected by the changed lookup record, as they too may need to be updated.

How to modify look-ups

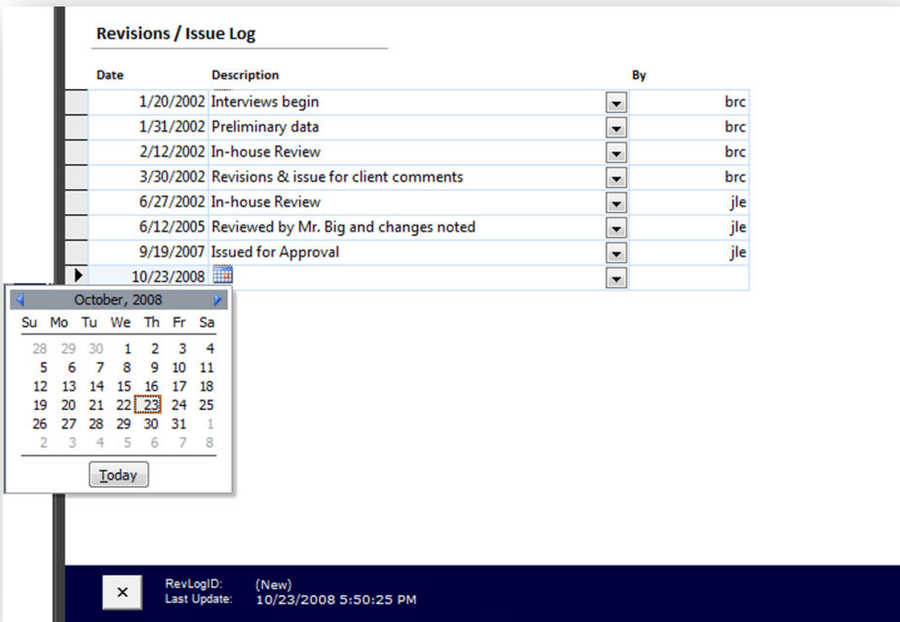
1. Lookup records include three editable fields:
    a. **Sort** (number) determines the order in which values are displayed in lists.
    b. **Lookup Value** (up to 20 characters, usually a simple abbreviation, and the value that is actually stored in various tables).
    c. **Description** (the longer value that is usually displayed on forms and reports).
2. To see the category of lookup values you want to modify, select the **Filter** (top section of the editor).
3. To add a new record, scroll to the bottom of the list (where you see an asterisk [*] in the record selector) and input values in all three fields.

4. To delete the lookup from all lists, select the record (press the record selector on the left) and press your Delete key.

Revisions / Issue Log editor

From the **Main screen**, 'Utilities' section, press the [Revisions / Issue Log] button.

In this editor you can create records of significant milestones, revisions, progress notes, submittals and

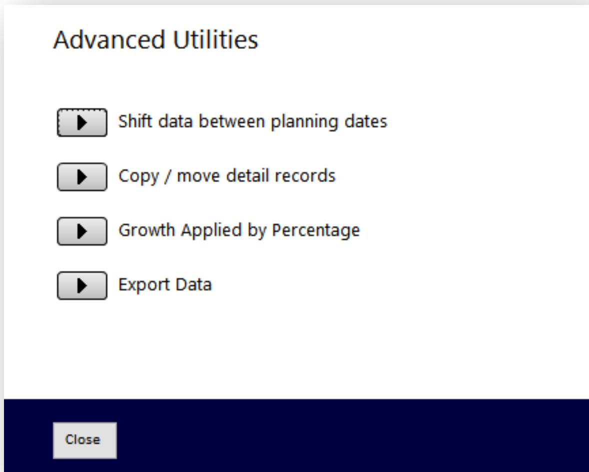


issue dates.

How to add a record to the Revisions/Issue Log

1. Scroll to the bottom of the list (where you see an asterisk [*] in the record selector) to add a new record.
2. Select or type in a description.
3. Type in the intitials of the contact person
4. This information is reported in the standard **SRP** report 'Profile'.

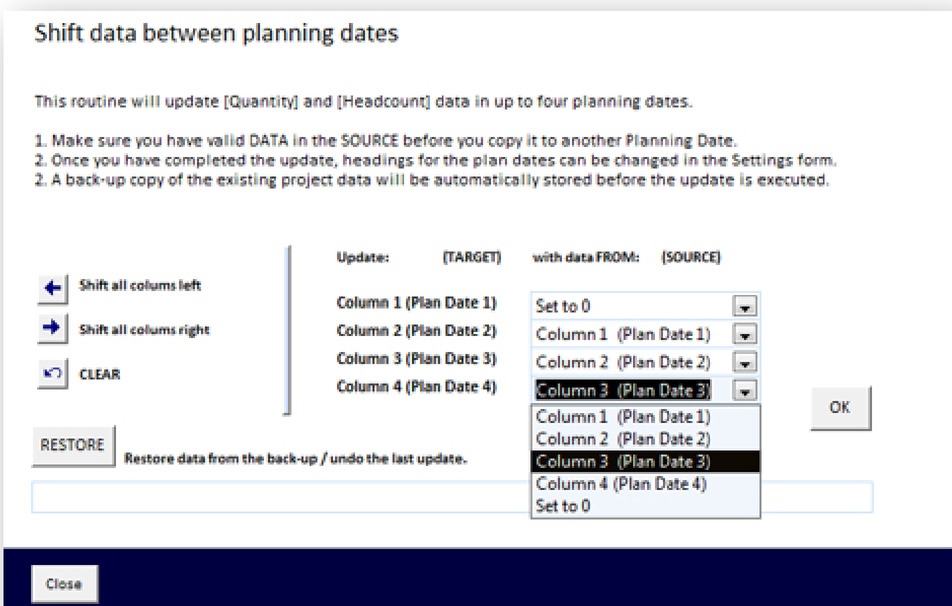
Advanced Utilities screen



From the **Main Screen**, 'Utilities' section, press the [Advanced Utilities] button
From the Advanced Utilities screen, you can manipulate large chunks of data using automated routines, to either shift data between planning dates, or copy or move detail records from one Planning Group to another.

Shift Data Between Planning Dates

From the **Advanced Utilities screen**, press the [Copy/move detail records] button.

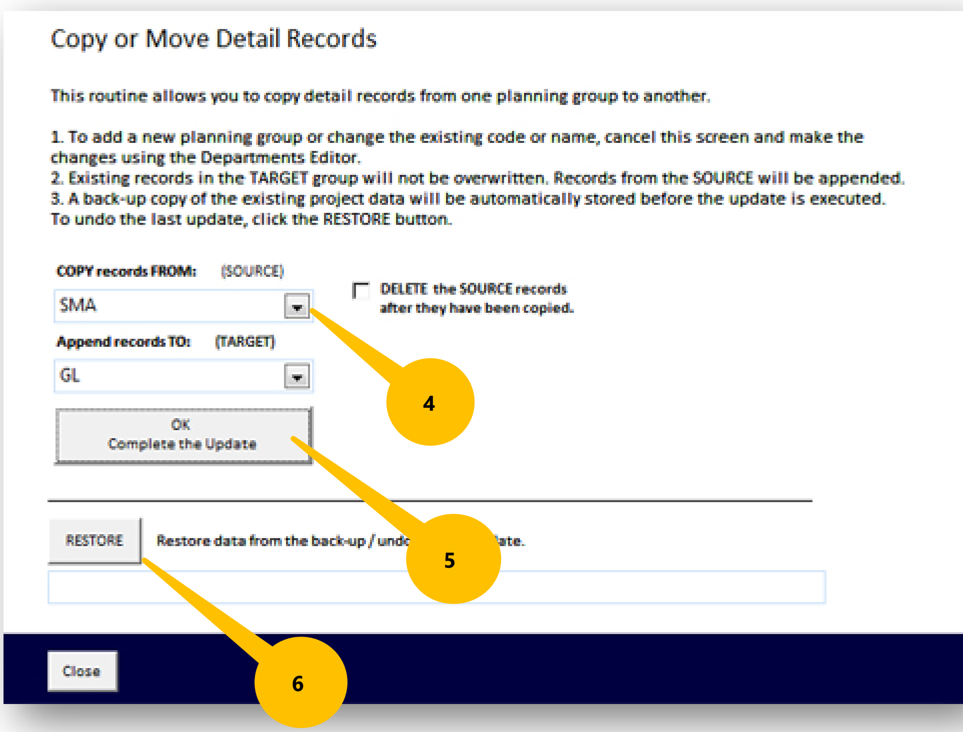


1. Shifting data is way to modify the [Quantity] and [Headcount] values quickly and thoroughly, by copying from one or more plan date to another.
2. From the Advanced Utilities screen, press the [Shift data between planning dates] button.
3. On the left side of the screen, there are buttons that automatically set values for two common scenarios: [Shift all columns left] and [Shift all columns right].
   a. For instance, if data in the first planning date is no longer needed, and you would like to add data for a new plan date at the end, you would press the [Shift all columns left] button. The combo boxes on the right side of the screen will be set accordingly in preparation for the automated routine.
   b. Choosing [Shift all colums Right] updates the combo boxes for moving data from the 3rd plan date to the 4th, from the 2nd to the 3rd; and the 1st to the 2nd.
4. On the right side of the screen there is a combo box for each of the four planning dates, providing a way to manually select how the columns are to be updated.
5. To complete the update, press the 'OK' button.
6. A backup-copy of the existing project data will be automatically stored before the update is executed. To undo the update, press the [Restore] button
7. Once you have completed the update, go to the **Settings editor** to adjust headings for the plan dates accordingly.

Copy or Move Detail Records

From the **Advanced Utilities screen**, press the [Copy/move detail records] button.

1. This routine automatically copies or moves an entire set of detail records from one Planning Group to another.



2. Records from the 'Source' group will be appended to the 'Target'. Existing records in the 'Target' group will not be overwritten.
3. Choose a Planning Group for the 'Source', which contains the data to be copied.

4. Choose a Planning Group for the ‘Target’, which will receive the appended records.
    a. If you want the records in the ‘Source’ to remain (i.e. ‘Copy’), leave the check box [DELETE the SOURCE records] unchecked.
    b. If you want the Source records deleted (i.e. ‘Move’), check the check box [DELETE the SOURCE records].
5. To complete the update, press the [OK] button.
6. A backup-copy of the existing project data will be automatically stored before the update is executed. To undo the update, press the [Restore] button.

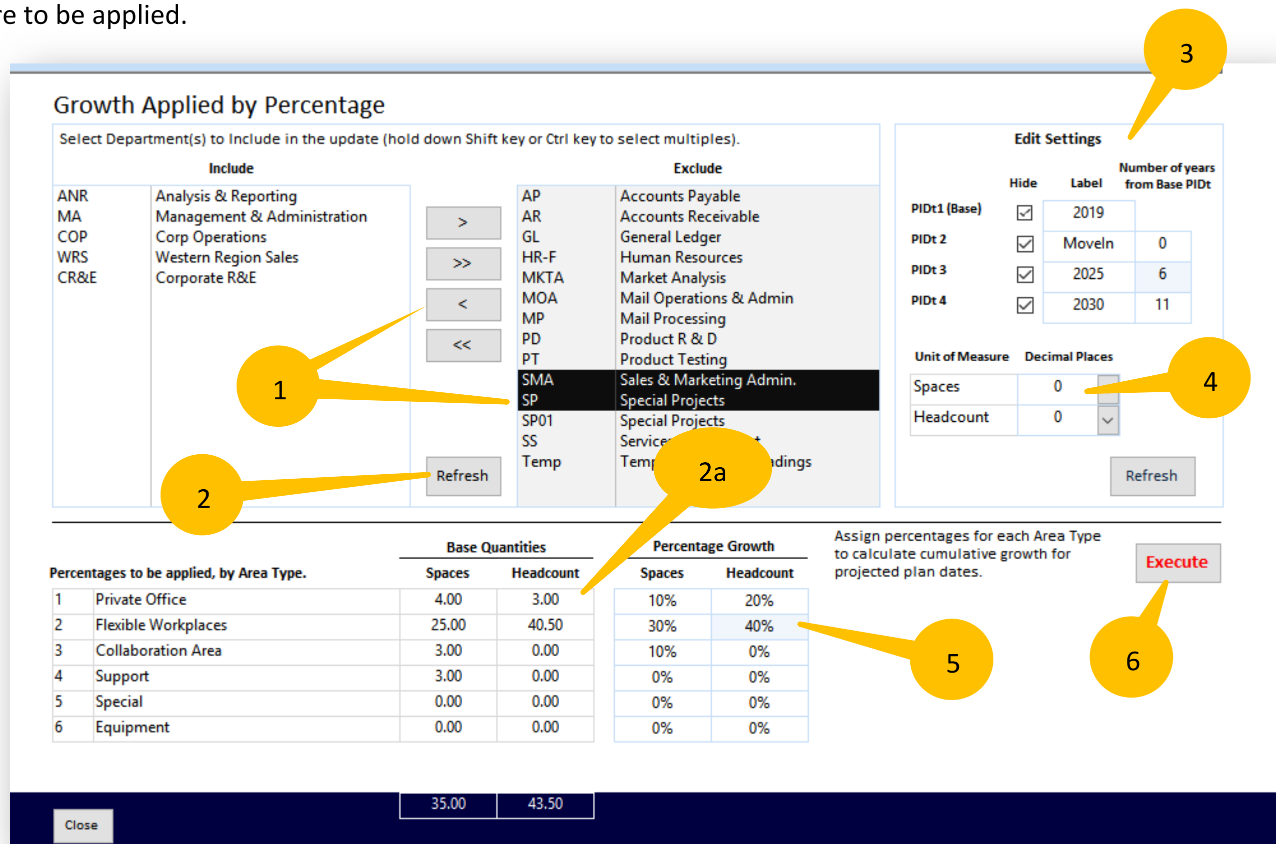
Growth Applied by Percentage

(This section applies to update v190130 and later)

From the **Advanced Utilities screen**, press the [Growth Applied by Percentage] button.

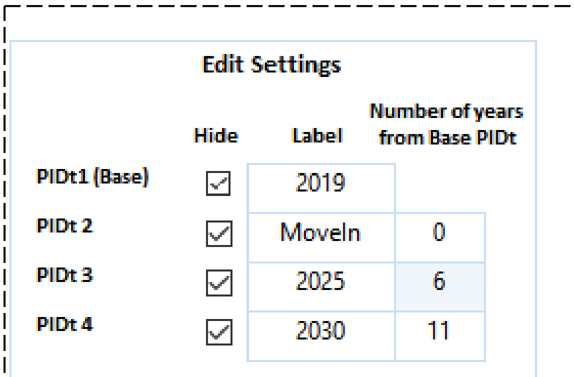
This tool is used to execute an automatic update of quantities for **Projected Planning Dates** with percentages calculated by year, compounded annually. PlDt1 quantities are the '**Base Quantities**' which must have been entered prior to using this tool.

You can select which **Departments** are to be included, specify how many **Years** are to be calculated between Plan Dates, set how many **Decimal places** are to be displayed, and specify the **Percentages** that are to be applied.



1. In the list boxes, select the Department(s) you want to Include or Exclude in the update.
    a. Hold down the Shift key or the Ctrl key to select multiples with your mouse.
       Press the [>] or [<] button to add/remove selected departments.
    b. To select 'All', press the [>>] or [<<] button.
2. Press the [Refresh] button to save your selections and re-calculate the 'Base Quantities' filtered on the departments included.
    a. 'Base Quantities' are the sum of Spaces and Headcount for the departments that have been 'Included', by Area Type. Totals are shown in the footer section.

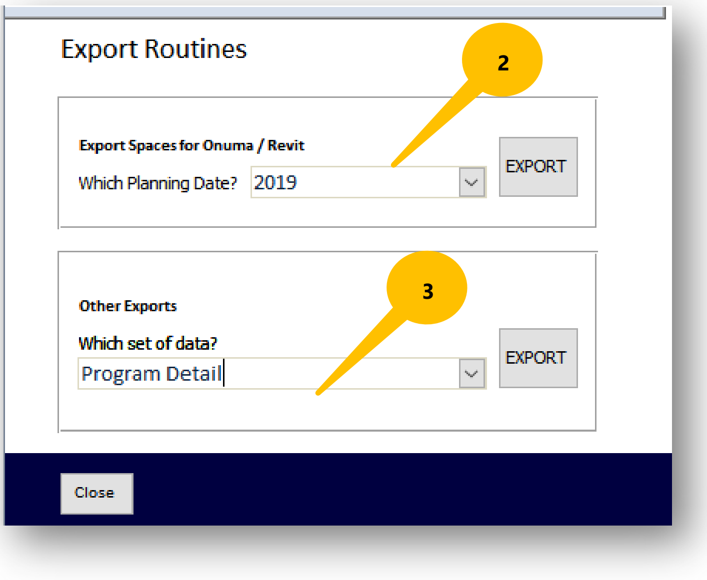
3. Settings
    a. If desired, edit the labels for each plan date.
    b. If desired, hide or show one or more of the PlanDates (does not impact calculations).
    c. If desired, edit the number of years from Base PlDt. for each of PlDt2, PlDt3 and PlDt4. In the example shown below:
        i. for the PlDt2 (‘MoveIn’), the value for ‘Number of years’ is set to 0. This will result in no growth for that Plan Date.
        ii. for the PlDt3 (‘2025’), the value for ‘Number of years’ is set to 6. This will result in a calculation of the Percentages applied to the PlDt1 Quantities six times.
        iii. for the PlDt4 (‘2030’), the value for ‘Number of years’ is set to 11. This will result in a calculation of the Percentages applied to the PlDt1 Quantities eleven times.

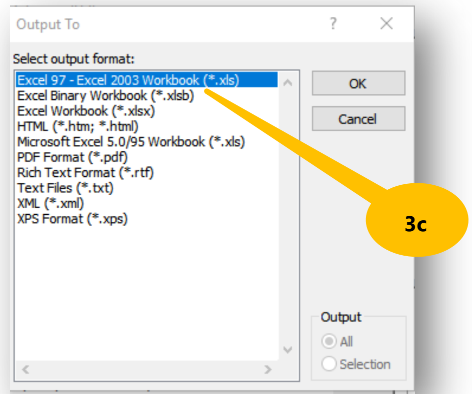


4. If desired, edit the decimal places to be shown for the Space and Headcount Quantities.
5. Enter the Percentage Growth (per Year, compounded) for each Area Type,
    a. Percentages can be different for Spaces and Headcounts.
    b. Entering 0 will result in no growth.
6. Press the [Execute] button to run the update.
    a. The update should take less than a second, a confirmation message will be displayed when complete.

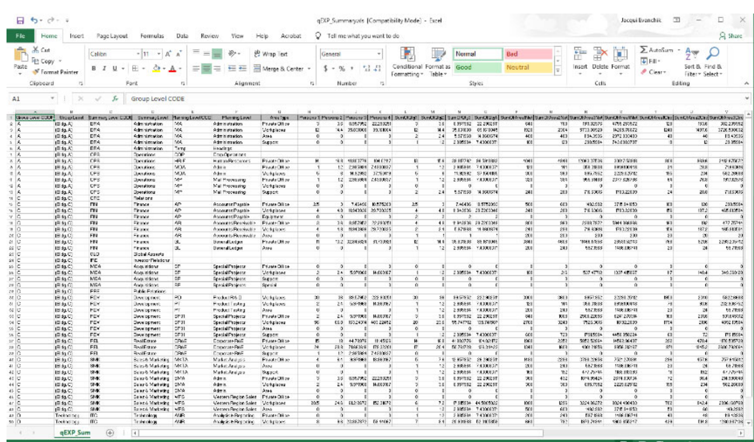
Export Data

From the **Advanced Utilities screen**, press the [Export Data] button to open the Export Routines screen.





1. This allows you to export selected sets of data to an external file. You can select any file type listed in the 'Output To' screen
2. To Export for the purpose of migrating data to an external system such as Revit or Onuma,
    a. Select a planning date
    b. Press the Export button
    c. Select the output file format
    d. Browse to the destination folder you want to Save the file to



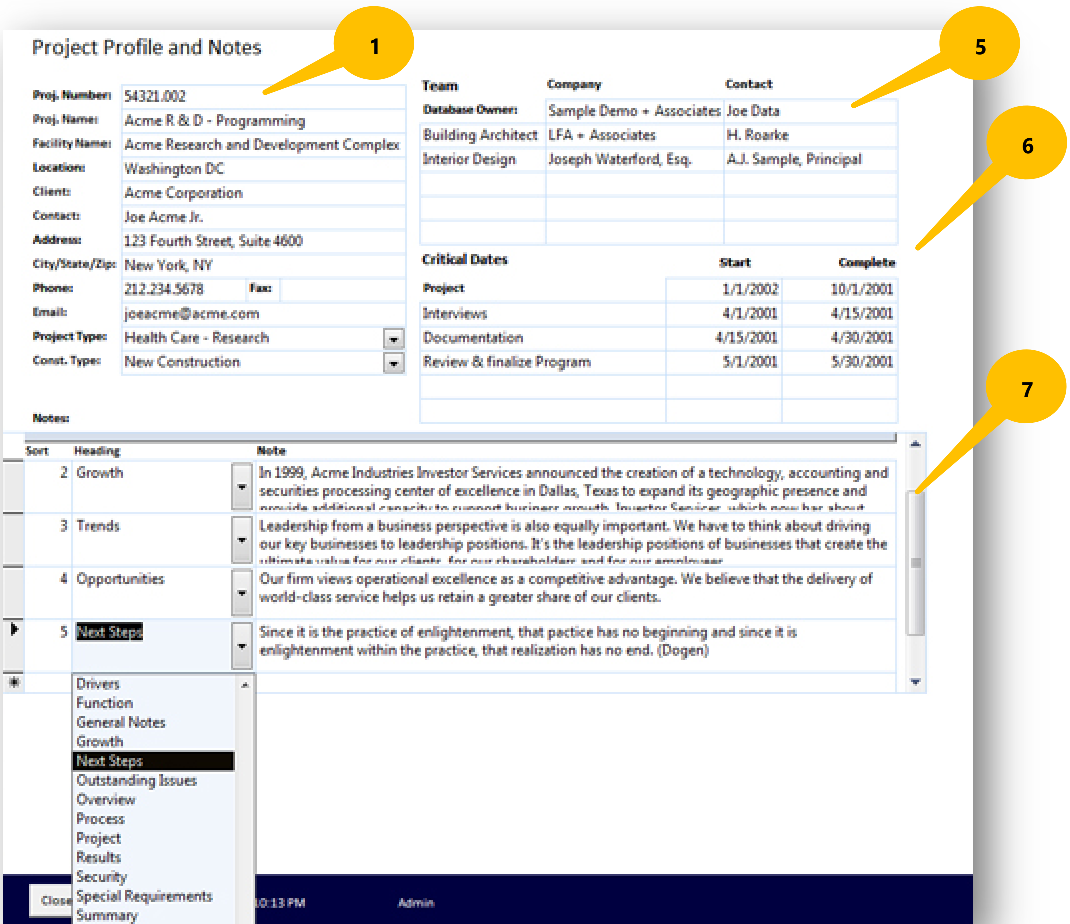
3. Other Export (to an Alternate File Format):
    a. Select the dataset you wish to Export
    b. Press the Export button
    c. Select the output file format.
    d. Browse to the destination folder you want to Save the file to.
    e. The exported data will be displayed in the specified file format.

Project Data Editors

Project Profile

From the ‘Main Screen’, Editors section, press the ‘Project Information’ button to open the Project Profile and Notes editor.

1. **Project Name**, **Project Number** and **Database Owner** appear on the Main screen and should be filled in for all projects. Other information is not required, and may be filled in or changed at any time.



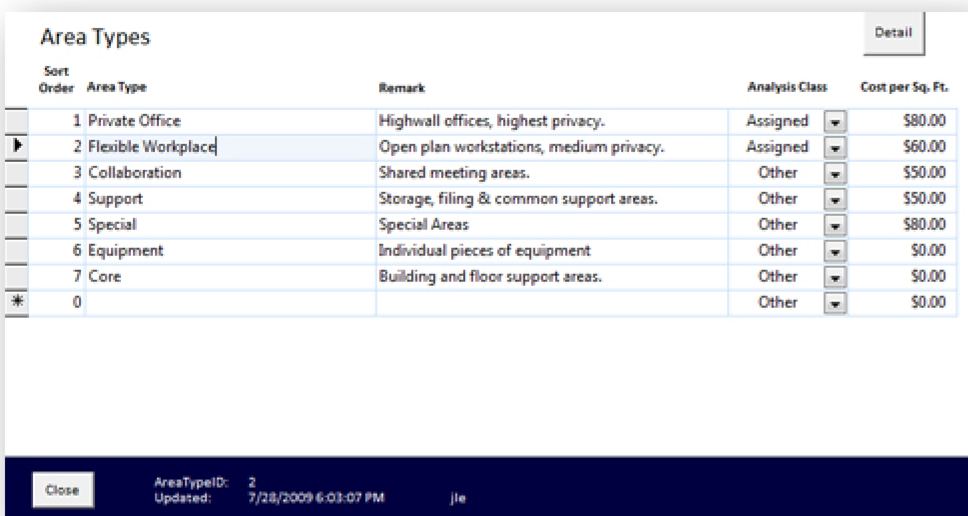
2. [Project], [Facility] and [Client] fields
   a. Type in information about the project and company for whom the program is being prepared.
3. Select a [Project Type] from the list or type in a new value to launch the ‘add-to-list’ routine.
4. Select a [Construction Type] from the list or type in a new value to launch the ‘add-to-list’ routine.
5. **Team**
   a. The [Database Owner] is typically the firm or company who is responsible for creating and managing the database.
   b. For other team members, type in the [Role], [Company] and [Contact] names.

6. **Critical Dates**
   a. Type in the [Description] and [Start] and [Complete] dates.
7. The **Notes** sub form accommodates unlimited notes, each with a [heading]and [sort] number.
   a. Select a [Heading] from the combo box list or type in a new value to launch the ‘add to list’ routine. To edit the list of heading values, use the **Lookups editor**.
   b. The [Sort] number determines the order in which notes are listed in reports.
   c. The content of the [Note] is unlimited.
   d. Use the [Enter] key for a line feed within a single note.
   e. To view a lengthy note, double press to open the Zoom Box’.

Area Types

From the **Main Screen**, ‘Editors’ section, press the [Project Information] button to open the Area Types editor.

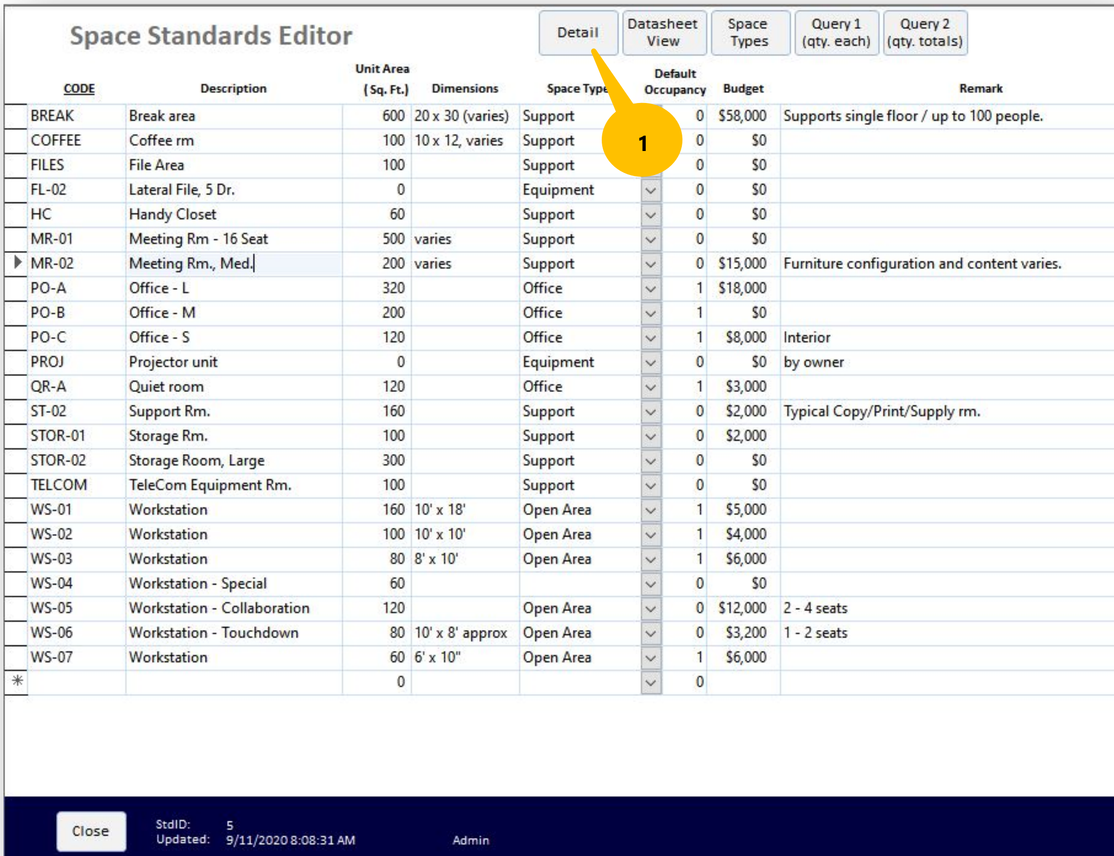
1. Area Types serve to organize the spaces assigned to each Planning Group and used to identify sections with sub-totals on Program Detail reports.



2. Every project must have at least one ‘Area Type’, and for most projects, 3 or 4 Area types is sufficient.
3. [Sort Order] determines the order Area Types are shown in pull-down lists and reports.
4. [Area Type] description (required field).
5. The [Analysis Class] determines whether Quantities are included in certain calculations, usually so to distinguish between support spaces (‘Other’) and spaces where people are positioned (‘Assigned’).
6. Each Area Type can be assigned a cost per sf/m2 for calculating area-based budgets, and a circulation factor can be set in the **Circulation editor**.
7. [Occupied] indicates whether the Area Type typically has occupants (persons) permanently assigned to the spaces. Select Yes or No.
8. [Cost per SF] value is used by the system in calculating of area-based budgets (unit of measure ‘SF’ is set in the Settings editor.

Space Standards

From the **Main screen**, ‘Editors’ section, press the [Departments] button.



CODE	Description	Unit Area (Sq. Ft.)	Dimensions	Space Type	Default Occupancy	Budget	Remark
BREAK	Break area	600	20 x 30 (varies)	Support	0	$58,000	Supports single floor / up to 100 people.
COFFEE	Coffee rm	100	10 x 12, varies	Support	0	$0	
FILES	File Area	100		Support	0	$0	
FL-02	Lateral File, 5 Dr.	0		Equipment	0	$0	
HC	Handy Closet	60		Support	0	$0	
MR-01	Meeting Rm - 16 Seat	500	varies	Support	0	$0	
MR-02	Meeting Rm., Med.	200	varies	Support	0	$15,000	Furniture configuration and content varies.
PO-A	Office - L	320		Office	1	$18,000	
PO-B	Office - M	200		Office	1	$0	
PO-C	Office - S	120		Office	1	$8,000	Interior
PROJ	Projector unit	0		Equipment	0	$0	by owner
QR-A	Quiet room	120		Office	1	$3,000	
ST-02	Support Rm.	160		Support	0	$2,000	Typical Copy/Print/Supply rm.
STOR-01	Storage Rm.	100		Support	0	$2,000	
STOR-02	Storage Room, Large	300		Support	0	$0	
TELCOM	TeleCom Equipment Rm.	100		Support	0	$0	
WS-01	Workstation	160	10' x 18'	Open Area	1	$5,000	
WS-02	Workstation	100	10' x 10'	Open Area	1	$4,000	
WS-03	Workstation	80	8' x 10'	Open Area	1	$6,000	
WS-04	Workstation - Special	60			0	$0	
WS-05	Workstation - Collaboration	120		Open Area	0	$12,000	2 - 4 seats
WS-06	Workstation - Touchdown	80	10' x 8' approx	Open Area	0	$3,200	1 - 2 seats
WS-07	Workstation	60	6' x 10"	Open Area	1	$6,000	
		0			0		

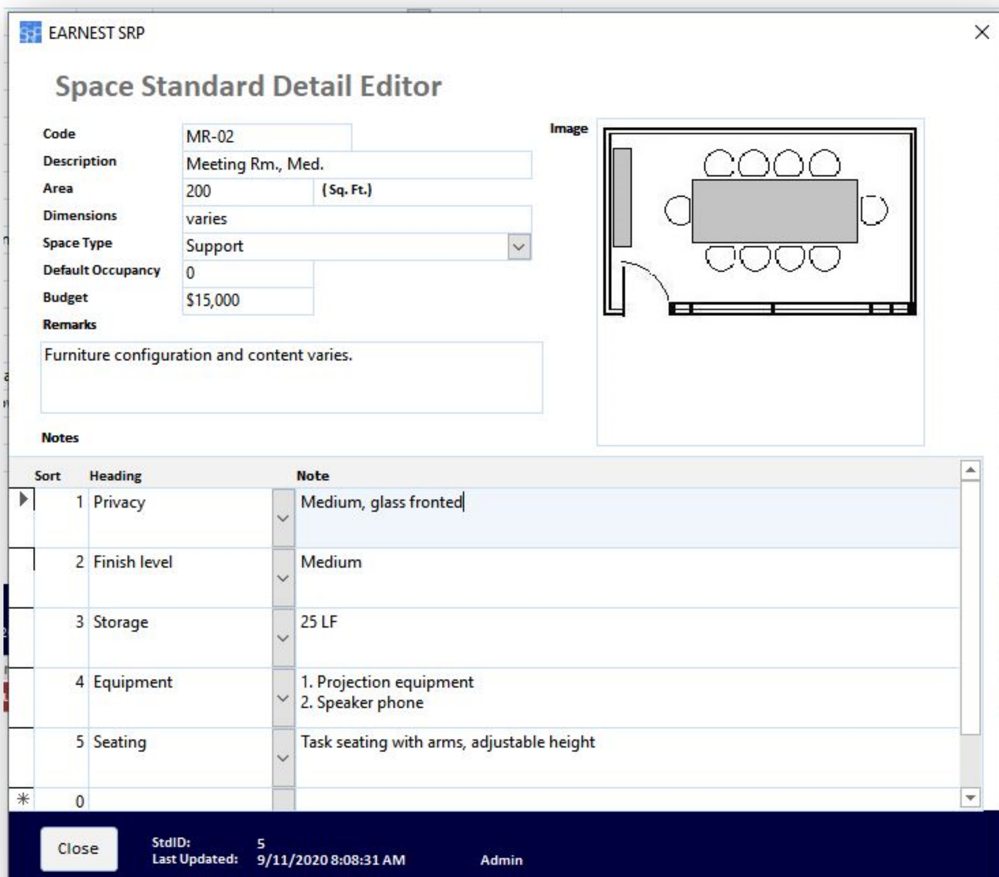
Space Standards are the building blocks used by the system to calculate **Area Projections** for each **Planning Date**. Space Standards are assigned to Planning Groups in the **Department Detail editor**.

1. In this screen, for each Space Standard record there are eight fields that can be edited. (go to the Space Standard Detail for more fields)
    a. [**CODE**] is the unique identifier for each space standard.The **CODE** can be a maximum of 20 characters. The CODE determines the sort order for space standards in most lists and reports.
    b. [**Description**] for each space standard should be generic, concise and unique.
    c. [**Area**] is the amount of space assigned to each Space Standard. Is used by the system to multiply on [**Quantity**] to calculate Area requirements for each planning date.
    d. [**Dimensions**] field can be used to note the footprint, module count, or other size-related description for each Space Standard.
        i. This is a text field, and is not used to calculate Area.
    e. [**Space Type**] is an optional filtering / sorting category.
        i. Select from the list or type in a new value, max 20 characters.
    f. To edit the Space Type list, press the [Space Type] button at the top of the screen.

   g. [**Default Occupancy**] is the number of persons that typically occupy each of the Space Standards.
   h. [**Budget**] is the unit cost used by the system to calculate instance-based budgets.
   i. [**Remarks**] field is for in-house type remarks, not typically shown on reports.
2. Press the [**Datasheet View**] button to view the data in datasheet view.
3. Press the [Detail] button to display the Space Standard Detail screen.
4. The [**Query 1**] and [**Query 2**] buttons launch a quick view of calculated totals for Space Standards, ordered by [Code].

Space Standard Detail

From the **Space Standards screen**, press the [**Detail**] button to open the Space Standard Detail editor.

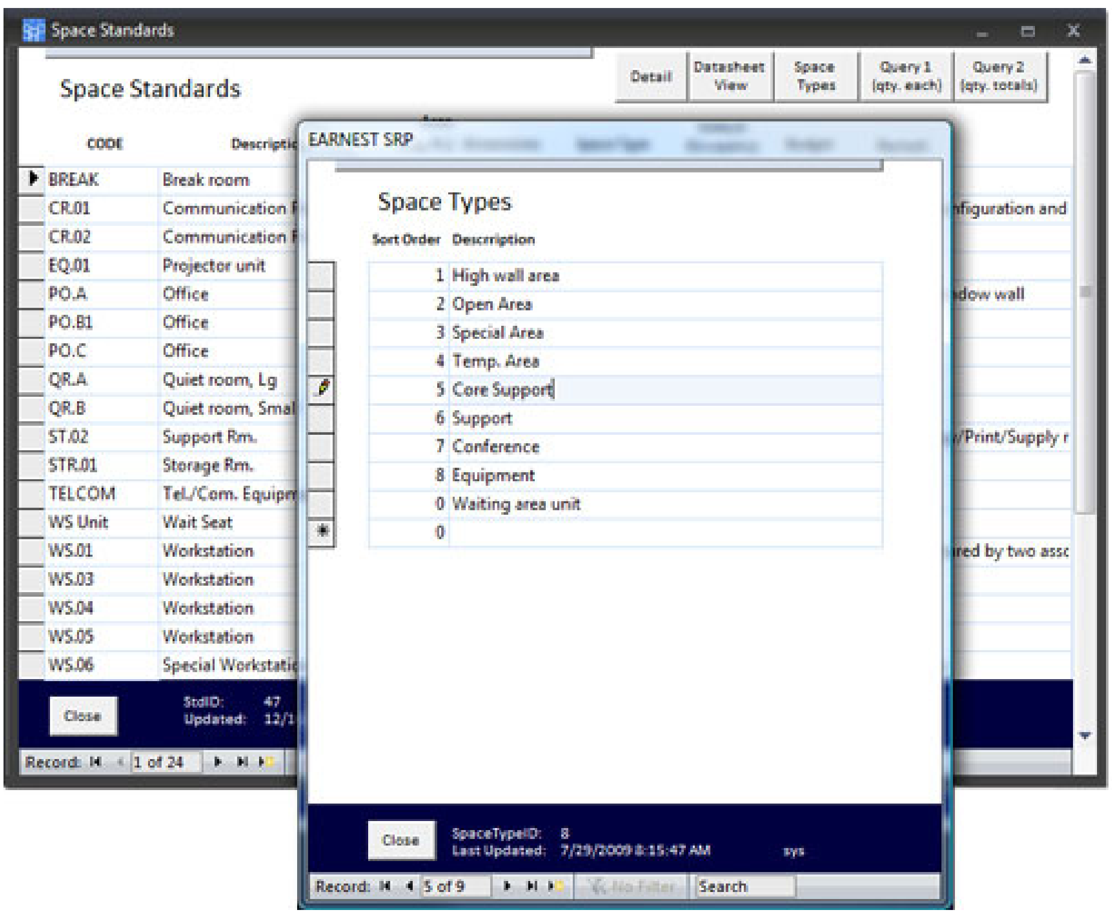


1. This editor displays one Space Standard record at a time, and provides the same fields as the **Space Standards editor** plus additional fields for an [Image file] and multiple [Notes] records.
2. The [Image] file can be a photo, drawing or sketch
   a. Use the **Windows Snipping Tool** to capture and paste images to this field. See '**Working with Images'**.

3. The **Notes** sub form (bottom section) accommodates unlimited notes, each with a [heading] and [sort] number.
    a. Select a [Heading] from the combo box list or type in a new value to launch the 'add to list' routine. To edit the list of heading values, use the **Lookups editor**.
    b. The [Sort] number determines the order in which notes are listed in reports.
    c. The content of the [Note] is unlimited.
    d. Use the [Enter] key for a line feed within a single note.
    e. To view a lengthy note, double press to open the 'Zoom Box'.

Space Types

From the **Space Standards screen**, press the [Space Types] button to open the Space Types editor.

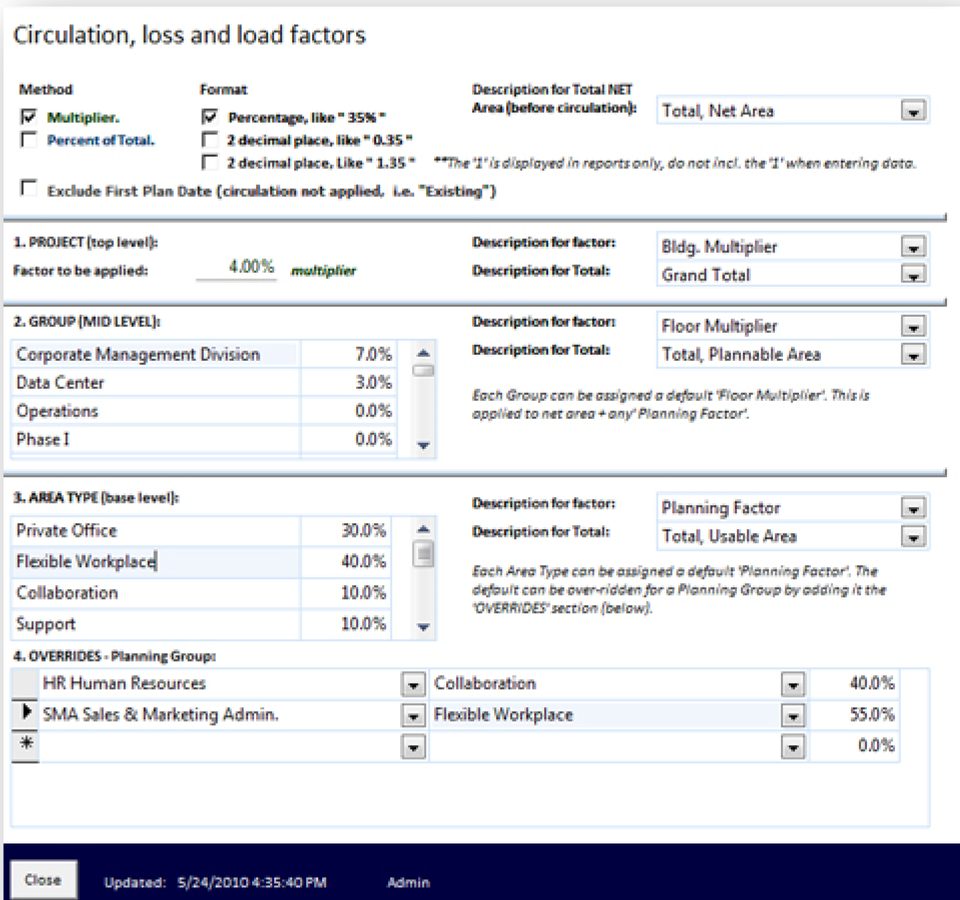


1. Space Types are optional filtering / sorting categories for the Space Standards.
2. Space Types are assigned to Space Standards the **Space Standards** editor.
3. [Sort Order] determines the order Area Types are shown in pull-down lists and reports.

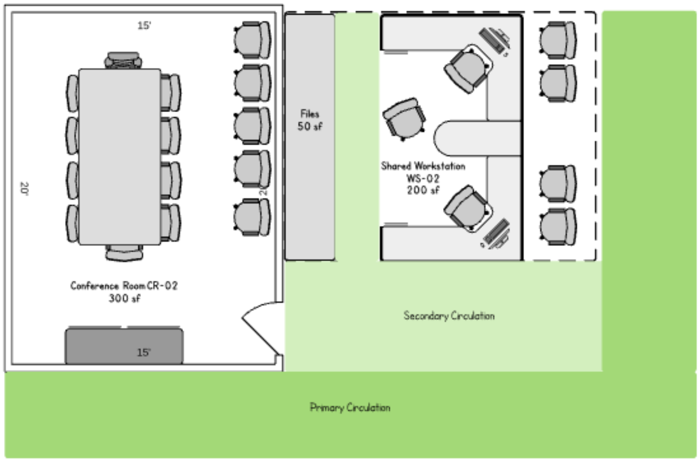
Circulation, loss and load factors

From the **Main Screen**, 'Editors' section, press the [Circulation] button to open the Circulation, loss and load factors editor.

The circulation factors you set for your project can have a considerable impact on your final Area projections.



1. Circulation factors can be assigned in up to 4 ways: at the **Project level,** the optional **Groupings level**, the **Area Types level** and as an **Override** to specific Area Types for specific Departments.
2. Circulation factors are known by many names, and used in various ways, so **SRP** provides a lot of flexibility. The naming, formatting, display options and the actual multipliers can be set or changed at any point in the project.
3. The calculation of circulation area is cumulative. The following diagram shows how Circulation is typically setup and calculated in **SRP**:



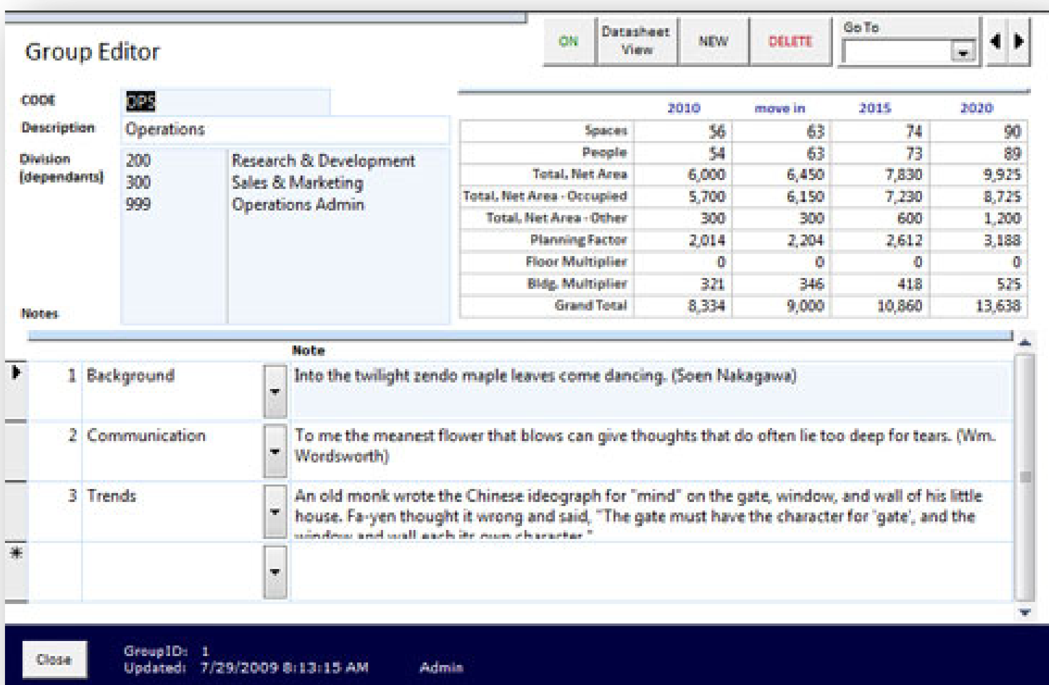
Space Standard	Qty	Sq.Ft.
CR-02	1	300
Files	1	50
WS-02	1	200
Total Net SF		550
Secondary Circulation	35%	192.50
Total Usable SF		742.50
Primary Circulation	15%	111.38
Total Gross SF		853.88
Load Factor	1.57%	12.81
Total Rentable SF		866.69

4. Method:
   a. Set the option to display 'Multiplier' or 'Percent of Total'.
   b. The system calculates circulation by building UP from the **Net Area**, thereby it always uses a 'multiplier'. If you wish, you can choose instead to display the 'Percent of Total' in the editor and reports.
   c. In the example above, the multiplier is being displayed, with secondary circulation at [35%] If the setting is changed to 'Percent of Total', the secondary circulation would be displayed in the editor and reports as [25.9%].
   d. If in the 'Percent of Total' mode, you type in [35%], the 'multiplier' used by the system will be automatically calculated and updated to [53.8%].
5. Format
   a. You can set the format of circulation factor to display in the editor and reports as a percentage '35%' or as a number with two decimal places '.35'. This has no impact on the calculation of area.
6. **Project Level circulation** is the top level, and is applied against the total Net Area + any Secondary and Primary circulation area.
   a. This top level might be used for a 'useable to rentable' factor, or it might be used to apply an 'average planning factor'.
   b. The [Name] for this level of circulation is user-defined, the default, as shown in the example above is 'Planning Factor'.
7. **Grouping level circulation** is the 2nd level down, and is applied to the Net Area + any Secondary circulation.
   a. This level might be used to adjust for planning conditions in different buildings or areas in a building.
   b. Grouping level is an optional summary level, and can set ON or OFF in the Settings editor.
   c. When set to OFF, any circulation factors assigned at this level are ignored in calculations.
   d. The [Name] for this level of circulation is user-defined, the default is 'Primary Circulation'.
   e. Each group can have a different circulation factor.
   f. When the factor is set to [0], there is no circulation area generated.
8. **Area Type level circulation** is the lowest level, and is applied to the Net Area.
   a. This level might be used to account for aisle space or undefined open space within the Department.
   b. The [Name] for this level of circulation is user-defined, the default is 'Secondary Circulation'.
   c. Each Area Type can have a different circulation factor.

   d. When the factor is set to [0], there is no circulation area generated.
9. **Override** allows you to make exceptions for specific Area Types in specific Departments.
   a. This is useful when one department might have atypical layout requirements or higher traffic volume.
   b. Select a [Department], the [Area Type], and type in the override factor.
   c. The name for this level of circulation is the [Name] you set at the Area Type level, in this example, ‘Secondary Circulation’.
10. When you close the Circulation editor, the new settings will be saved, and all calculations in editors and reports will automatically reflect the new settings.

Groups

From the **Main screen**, in the ‘Editors’ section, press the [**Group**] button to open the **Group editor**.
1. An unlimited number of Groups can be established. Each Group can be assigned to multiple summary units (‘Divisions’).



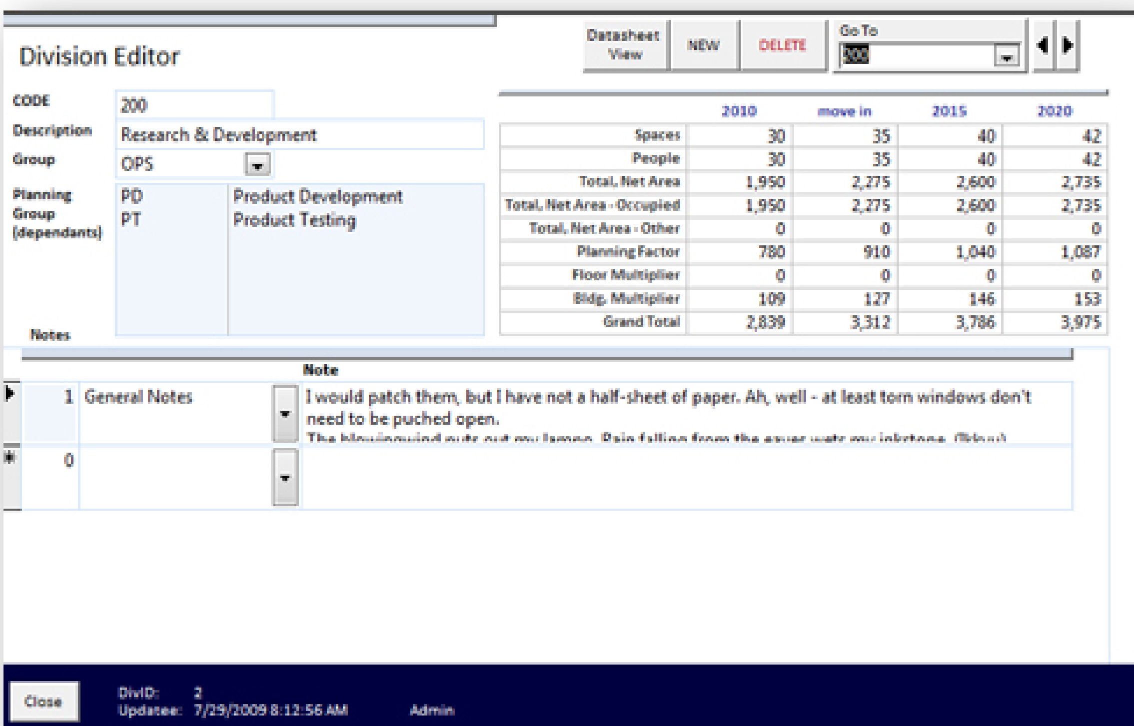
   a. The title for this level is user-defined in the **Settings editor**, the default title is ‘Group’.
2. This is an optional, top summary level.
   a. For small or uncomplicated projects this level can be turned off.
   b. Turning off this level does not discard any data that may have been entered, the level will only be ignored in reporting.
3. Press the [On]/[Off] button to enable or disable this level, in this screen, or in the **Settings editor**.
4. Press the ‘Datasheet View’ button to switch from form view (single record) to Datasheet view (mulltiple records).

5. Fields for each record are:
    a. [**CODE**] is the unique identifier, and determines the sort order in lists and reports. This is a required field, allowing a maximum of 20 characters.
    b. [**Description**] is the full name for the 'Grouping'. This is a required field, allowing a maximum of 255 characters.
6. The **Notes** sub form (lower section) accommodates unlimited notes, specific to each Group. Each note record has a [heading] and [sort] number.
    a. Select a [**Heading**] from the combo box list or type in a new value to launch the 'add to list' routine. To edit the list of heading values and their sort numbers, use the **Lookups editor**.
    b. The [**Sort**] number determines the order in which notes are listed in reports. You can accept the default, or update for this instance. The [Note] field is a memo field, allowing unlimited content.
        i) Use the [**Enter**] key for a line feed within a single note.
        ii) To view a lengthy note, double press to open the Zoom Box.

Divisions

From the **Main screen**, in the 'Editors' section, press the [**Division**] button to open the **Division editor**.

1. The title for this level is user-defined in the **Settings** editor - the default title is 'Division'.



2. An unlimited number of summary levels can be created.
3. Each '**Division'** can have multiple Planning Groups ('Departments') assigned to it.

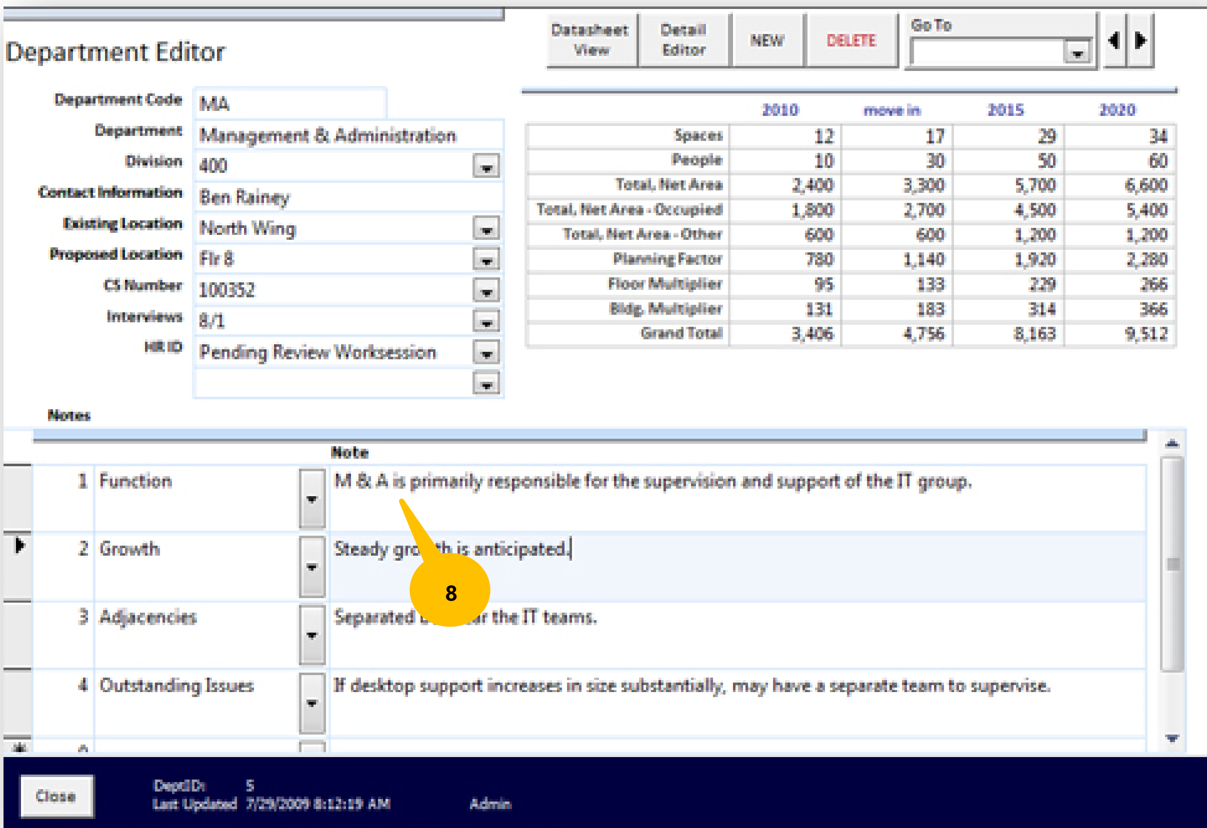
4. At the top of the screen, press the [**Datasheet View**] button to switch from Form View (single record) to Datasheet View (multiple records).
5. Fields for each record are:
   a. [**CODE**] is the unique identifier, and determines the sort order in lists and reports. Maximum of 20 characters. This is a required field.
   b. [**Description**] is the full name for the ‘Division’. This is a required field.
   c. [**Group**] is the assignment of this ‘Division’ to a top summary level (‘Group’). Select from the list or type in a new Group CODE.
6. Totals section consists of read-only fields that display the current totals for the ‘Division’.
   a. [**Persons**] Total number of persons (headcount) for each of the planning dates.
   b. [**Total Programmed Area**] Total programmed area (incl. all circulation) for each of the planning dates.
   c. [**NET Area**] Total programmed NET area (NO circulation) for each of the planning dates.
   d. [**NET Area - Occupied**] NET Area (NO circulation) in Area Types defined as ‘Occupied’, for each of the planning dates. In this [**NET Area - Other**] NET Area (NO circulation) in Area Types defined as NOT ‘Occupied’, for each of the planning dates.
   e. [**Planning Allowance**] Area calculated for project level circulation, for each of the planning dates. Defined in the ‘Circulation’ editor.
   f. [**Primary Circulation**] Area calculated for ‘Groupings’ level circulation, for each of the planning dates. Defined in the ‘Circulation’ editor.
   g. [**Secondary Circulation**] Area calculated for ‘Area Type’ level circulation, for each of the planning dates. Defined in the ‘Circulation’ editor.
7. The **Notes** sub form (lower section) accommodates unlimited notes, specific to each Division. Each note record has a [heading] and [sort] number.
   a. Select a [**Heading**] from the combo box list or type in a new value to launch the ‘add to list’ routine. To edit the list of heading values and their sort numbers, use the **Lookups editor**.
   b. The [**Sort**] number determines the order in which notes are listed in reports. You can accept the default, or update for this instance.
   c. The [**Note**] field is a memo field, allowing unlimited content.
      i) Use the [**Enter**] key for a line feed within a single note.
      ii) To view a lengthy note, double press to open the Zoom Box.

Departments

From the **Main screen**, in the ‘Editors’ section, press the [**Departments**] button to open the **Department editor**.

1. The title for this level is user-defined in the **Settings editor** - the default title is ‘Department’.
2. An unlimited number of ‘Departments’ (planning levels) can be created.
3. Each ‘Department’ can be assigned multiple **Detail** records and **Note** records.

4. Press the [**Datasheet View**] button to switch from form view (single record) to Datasheet view (mulltiple records).
5. Fields for each record are:
   a. [**CODE**] is the unique identifier, and determines the sort order in lists and reports. Maximum of 20 characters. This is a required field.

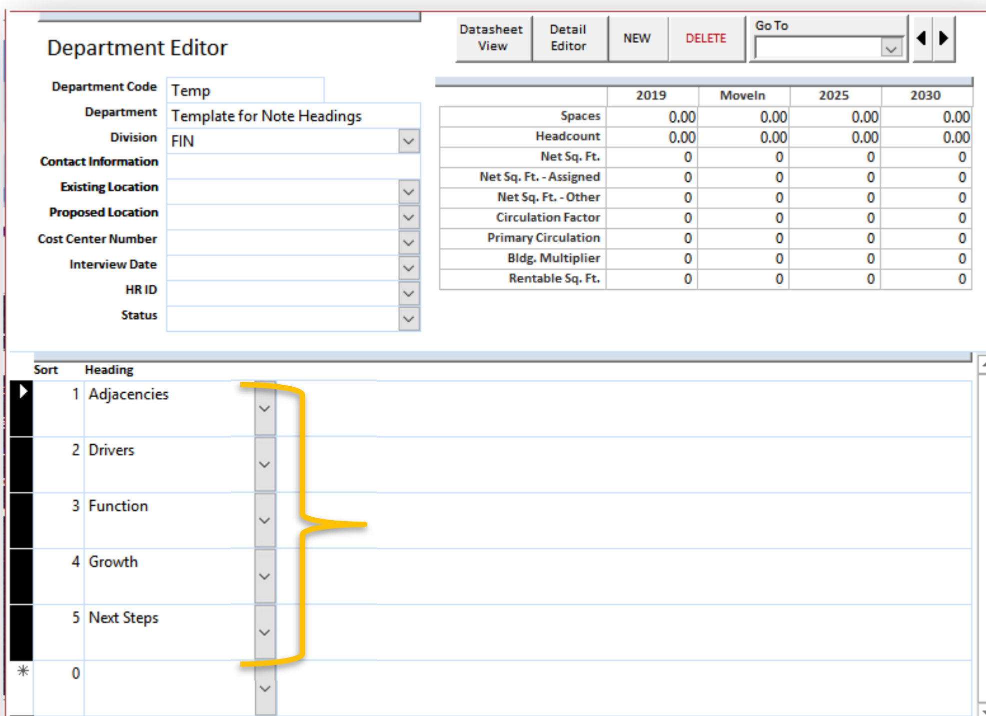


   b. [**Description**] is the full name for the 'Department'. This is a required field.
   c. [**Division**] is the assignment of this 'Department' to a summary level ('Division'). Select from the list or type in a new Division CODE.
6. **Totals section** consists of read-only fields that display the current totals for the 'Department'.
   a. [**Persons**] is Total number of persons (headcount) for each of the planning dates.
   b. [**Total Programmed Area**] Total programmed area (incl. all circulation) for each of the planning dates.
   c. [**NET Area**] Total programmed NET area (NO circulation) for each of the planning dates.
   d. [**NET Area - Occupied**] NET Area (NO circulation) in Area Types marked as 'Occupied', for each of the planning dates.
   e. [**NET Area - Other**] NET Area (NO circulation) in Area Types defined as NOT 'Occupied', for each of the planning dates.
   f. [**Planning Allowance**] Area calculated for project level circulation, for each of the planning dates. Defined in the 'Circulation' editor.
   g. [**Primary Circulation**] Area calculated for 'Groupings' level circulation, for each of the planning dates. Defined in the 'Circulation' editor.

   h. [**Secondary Circulation**] Area calculated for 'Area Type' level circulation, for each of the planning dates. Defined in the 'Circulation' editor.
7. The **Notes** sub form (lower section) accommodates unlimited notes, specific to each Department. Each note record has a [**Heading**] and [**Sort**] number.
   a. Select a [**Heading**] from the combo box list or type in a new value to launch the 'add to list' routine.
   b. To edit the list of heading values and their sort numbers, use the **Lookups editor**.
   c. The [**Sort**] number determines the order in which notes are listed in reports. You can accept the default, or update for this instance.
   d. The [**Note**] field is a memo field, allowing unlimited content.
      i) Use the [**Enter**] key for a line feed within a single note.
      ii) To view a lengthy note, double press to open the Zoom Box.

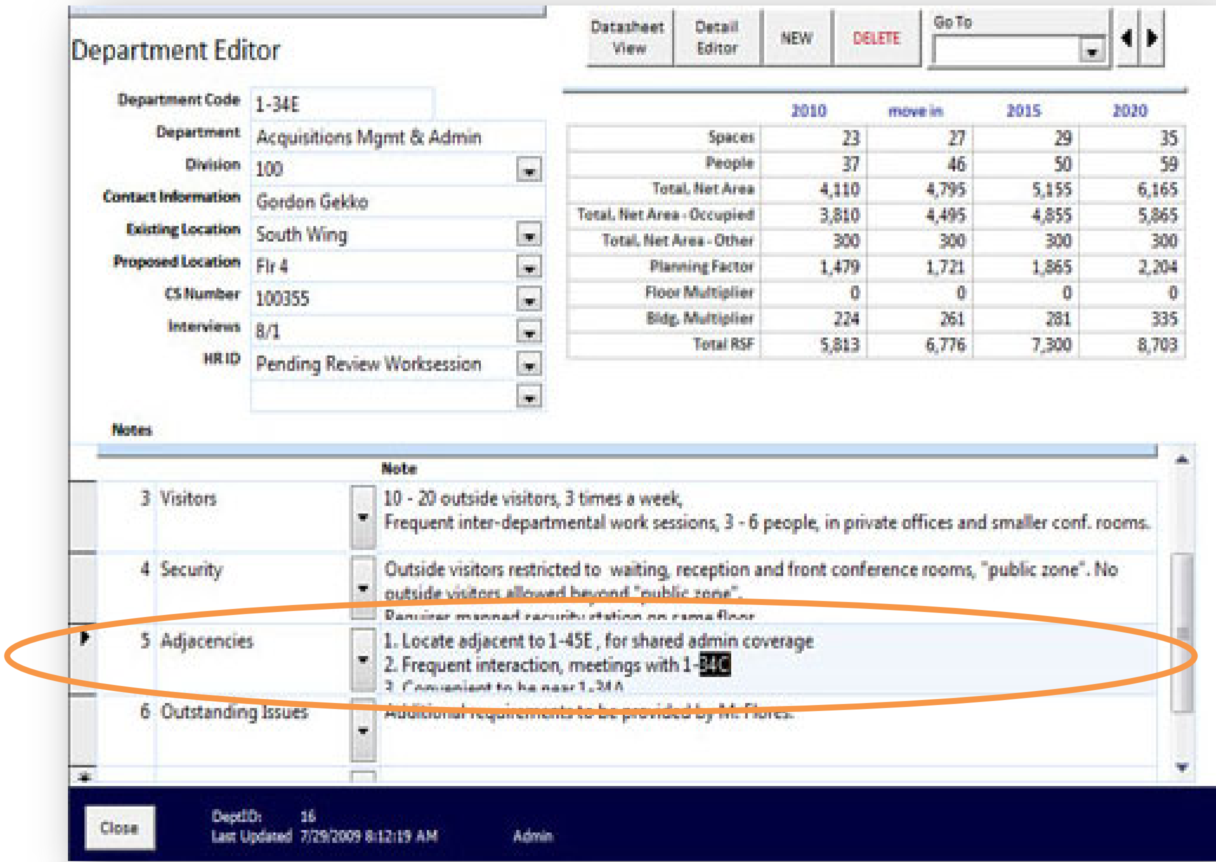
Tip: If you want to repeat the same notes or note headings in multiple Departments, set up a 'template' in one department and copy/paste into the others:

1. Select the record(s) you want to copy; press Ctrl + C;
2. Move to the next department and select the first row in the notes section;
3. Press Ctrl + V to paste.

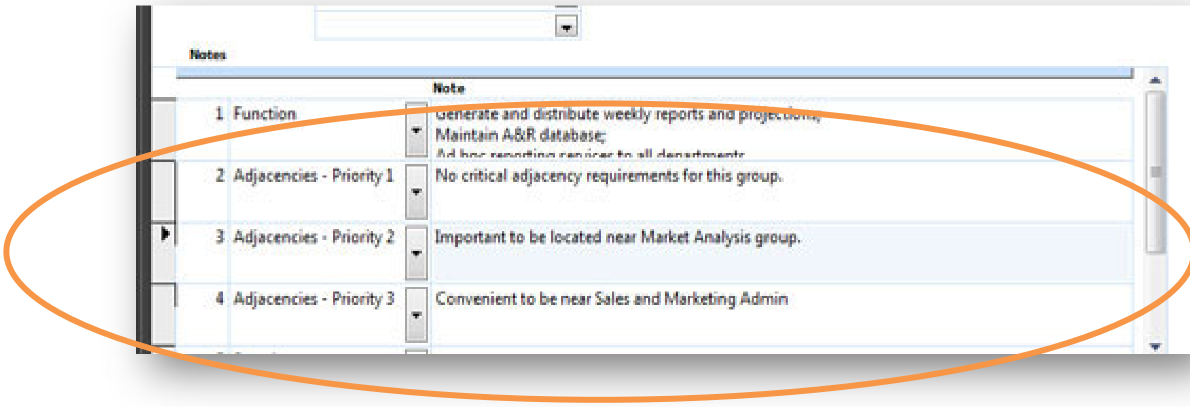


Adjacencies information

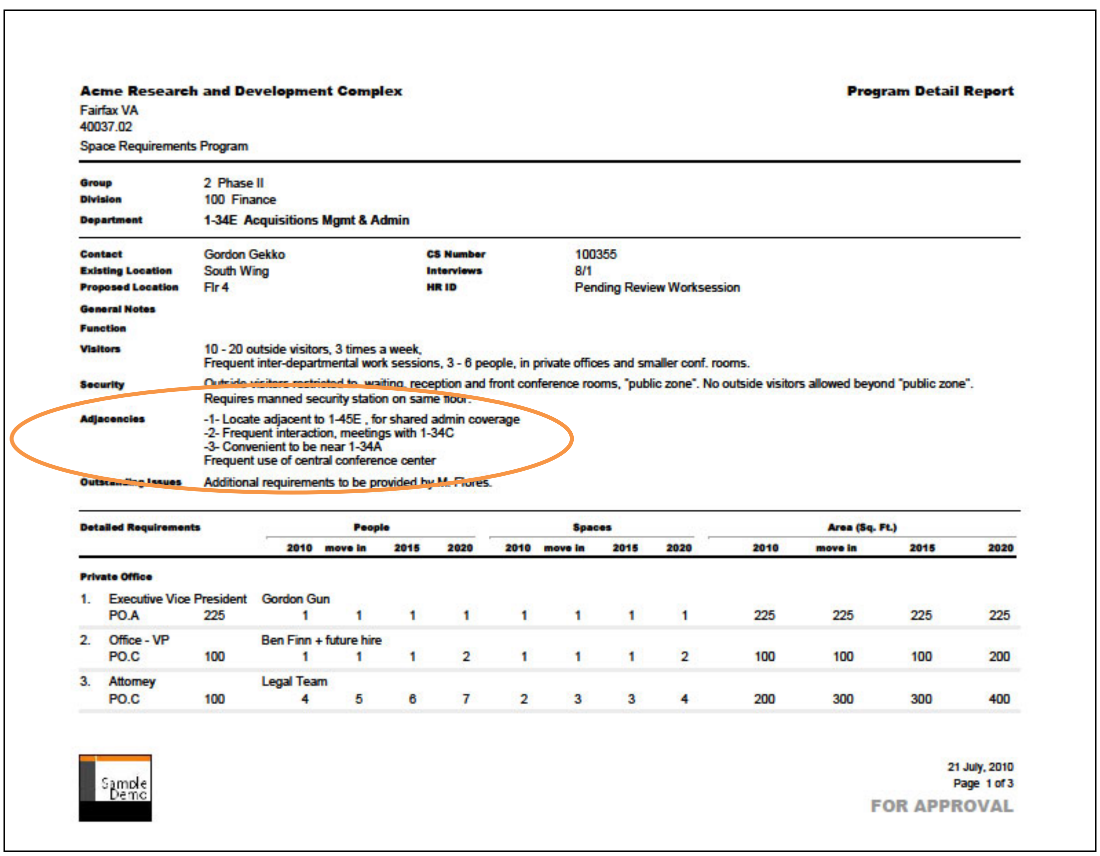
In Earnest **SRP**, **Adjacencies information** is carried in the Notes section of each Department, allowing for a great deal of flexibility for the user to control the ranking method, the amount of detail desired, and ultimately how the information is reported. At its simplest, Adjacencies information It can be input as a single record:



To add more sorting and filtering capabilities, data can be input as individual records using standardized headings for the purpose of ranking, as shown in figure 2. The number in the [Sort] field determines where the data falls within the other Notes.



Adjacencies information is displayed in every standard Department Detail report that includes the Note section, as shown in figure 3.



Acme Research and Development Complex — **Program Detail Report**

Fairfax VA
40037.02
Space Requirements Program

Group	2 Phase II
Division	100 Finance
Department	1-34E Acquisitions Mgmt & Admin

Contact	Gordon Gekko	**CS Number**	100355
Existing Location	South Wing	**Interviews**	8/1
Proposed Location	Flr 4	**HR ID**	Pending Review Worksession

General Notes

Function

Visitors 10 - 20 outside visitors, 3 times a week.
Frequent inter-departmental work sessions, 3 - 6 people, in private offices and smaller conf. rooms.

Security Outside visitors restricted to waiting, reception and front conference rooms, "public zone". No outside visitors allowed beyond "public zone".
Requires manned security station on same floor.

Adjacencies -1- Locate adjacent to 1-45E , for shared admin coverage
-2- Frequent interaction, meetings with 1-34C
-3- Convenient to be near 1-34A
Frequent use of central conference center

Outstanding Issues Additional requirements to be provided by M. Flores.

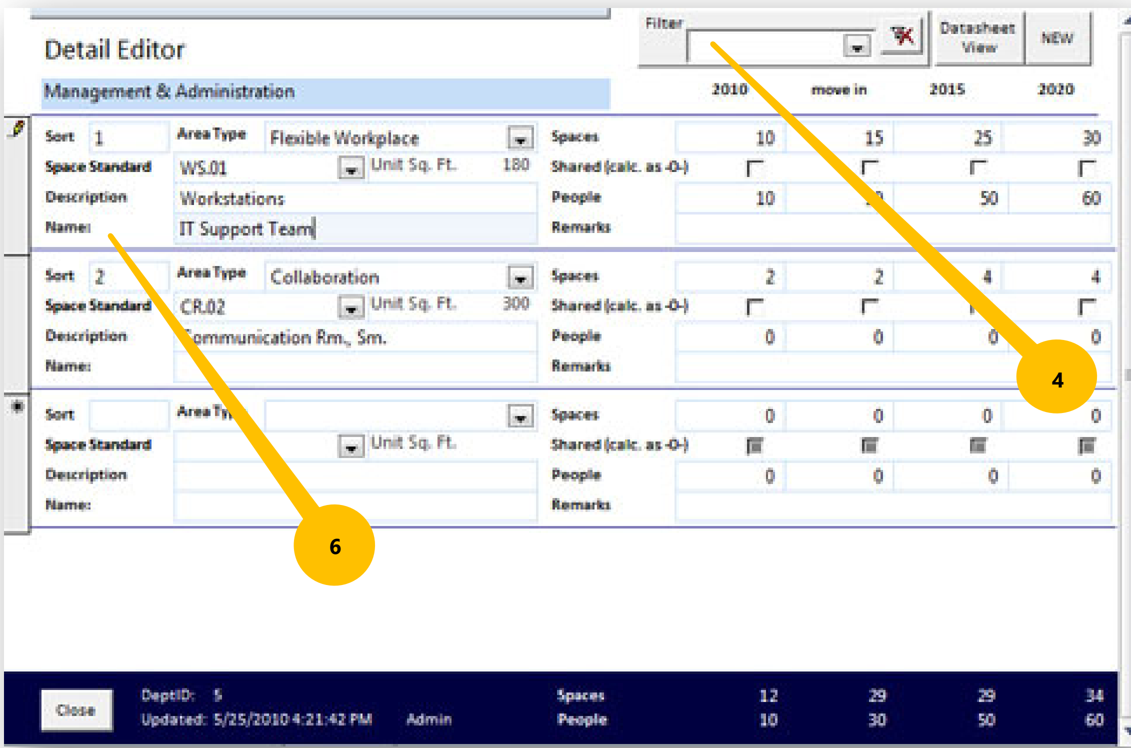
Detailed Requirements					**People**				**Spaces**				**Area (Sq. Ft.)**			
					2010	**move in**	**2015**	**2020**	**2010**	**move in**	**2015**	**2020**	**2010**	**move in**	**2015**	**2020**
Private Office																
1.	Executive Vice President			Gordon Gun												
	PO.A	225			1	1	1	1	1	1	1	1	225	225	225	225
2.	Office - VP			Ben Finn + future hire												
	PO.C	100			1	1	1	2	1	1	1	2	100	100	100	200
3.	Attorney			Legal Team												
	PO.C	100			4	5	6	7	2	3	3	4	200	300	300	400

Sample Demo

21 July, 2010
Page 1 of 3
FOR APPROVAL

Department Detail

From the **Main screen**, in the 'Editors' section, press the [Departments] button,
from the **Departments editor**, select the Department record, and then press the [Detail] button.
The Detail editor displays the **Detail** records for one 'Department' at a time.



1. To generate **Area calculations** and most reports, you must have detail records.
   a. Each record must have an [**Area Type**], [**Space Standard**] and values in the [**Qty. Spaces**] fields in one or more of the 4 planning date columns.
   b. Data is saved when your curser is moved from one record to the next.
2. An unlimited number of Detail records can be added for each Department.
3. The number of planning dates shown is set in the **Settings editor**.
4. [**Filter**] allows you to view records for a single Area Type at a time. A command button at the right of [**Filter**] will clear the filter to show 'All'.
5. [**Sort**] is the order in which the Detail records will be displayed in reports. This field will populate automatically when you add a new record, or you can type in a number. Typically, the numbering sequence begins with 1 for each of the Area Types.
6. [**Area Type**] is a required field, and determines which section the entry will occur in the Program Detail Report.
7. [**Space Standard**] is a required field if you want to generate Area calculations for any of the 3 planning dates. If you have a Space Standard already, one can be selected from the pull down list, which is organized by the Space Standard CODE. You can type in a new CODE to add a new Space Standard on the fly.

8. [**Sq.Ft.**] for 'Existing' is a value you type in for each existing space or position for each entry. Net Area calculations will multiply this by the [Qty. Spaces] to arrive at Net Area.
9. [**Description**] is the position or description of the space. You can leave this blank, and when a Space Standard is selected, the description will be automatically filled in as a default description.
10. [**Name**] is a user-defined field, the label (and therefore the usage) of the field is set in the **Settings editor**. It might be used to identify a name of an individual, a grade level or the name of a team.
11. [**Spaces**]
    a. The label for the field is set in the **Settings editor**.
    b. Enter the quantity of spaces or positions for each entry .
        i) When you type in a value, it is repeated for each of the planning dates to the right, which can then each be in turn, overwritten with other values. Always work from left to right.
12. [**Persons**]
    a. The label for the field is set in the **Settings editor**.
    b. Enter the number of persons in that position or type of space for each entry. When you type in a value, it is repeated for each of the planning dates to the right, which can then each in turn be overwritten with other values.
13. [**Shared**] allows you to 'zero-out' the area calculation, and is used in cases where you want to describe a space and assign a standard, but because it is listed elsewhere in the program for another department who 'shares' the space, you don't want to duplicate quantities or Area calculations.
14. [**Remarks**] is a memo field, allowing an unlimited amount of text. You can number your remarks, and press the Enter key to add a line feed. To see a larger editing frame, double-press on the field to launch the 'zoom box'.
15. **Datasheet View** is an alternate and sometimes more expedient way to view and edit Detail records.
    a. Press the [**Data Sheet View**] command button the view of the records to a tabular layout, with records as rows with the fields spread out horizontally.

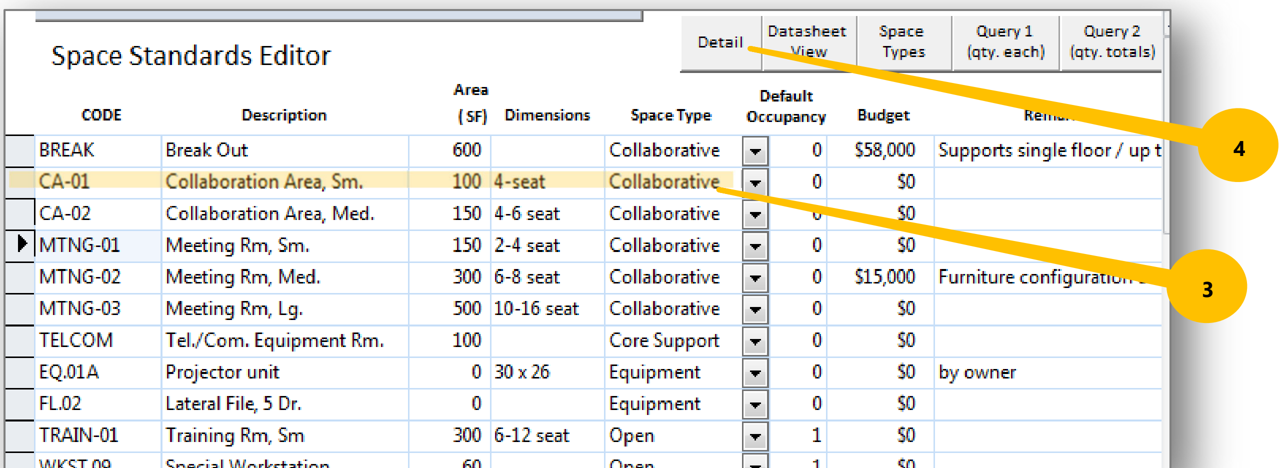
cboDeptID	Area Type	Description	Sort	SpaceName2	Space Standard	Qt
AR Accounts Receivable	Private Office	Office	2	test	PO.A	
AR Accounts Receivable	Flexible Workplace	Office	2		PO.A	
AR Accounts Receivable	Private Office	Office	3		PO.A	
AR Accounts Receivable	Collaboration	Communication Area	4		CR.02	
GL General Ledger	Private Office	Jr. Analyst	1		PO.B1	
GL General Ledger	Private Office	Office	2		PO.B1	
GL General Ledger	Collaboration	Communication Rm., S	3		CR.02	
HR Human Resources	Private Office	Director's Office	1	Mr. Jones	PO.A	
HR Human Resources	Private Office	Manager Office	2		PO.B1	
MA Management & Administration	Flexible Workplace	Workstations	1	IT Support Team	WS.01	
MA Management & Administration	Collaboration	Communication Rm., S	2		CR.02	
MKTA Market Analysis	Private Office	Vice President	1	New Hires	PO.A	
MKTA Market Analysis	Private Office	Vice President	1	Carl Fox	PO.B1	
MKTA Market Analysis	Private Office	Executive Assistant	2	Natalie	PO.B1	
MKTA Market Analysis	Private Office	Vice President	2	Richard Cheney	PO.A	
MKTA Market Analysis	Collaboration	Communication Rm., Lg	3		CR.01	
MKTA Market Analysis	Support	Support Rm.	4		ST.02	
MP Mail Processing	Private Office	Office	1	Mr. Big	PO.A	
MP Mail Processing	Private Office	Office	2	TEAM X (Joe, Fred and James	PO.B1	
MP Mail Processing	Private Office	Office	3		PO.C	
MP Mail Processing	Flexible Workplace	Workstation	4	Admin Team	WS.06	
MP Mail Processing	Support	Quiet room, Lg	5		QR.A	
MP Mail Processing	Special	Communication Rm., Lg	6		CR.01	
PD Product Development	Flexible Workplace	Designers	1		WS-02	
PT Product Testing	Private Office	Workstation	1		WS.04	

b. In Datasheet View you can edit records (just as you do in Form View), adjust the size and position of the fields (columns) filter and sort records on any field, and re-assign records to other departments.
c. To return to 'Form View', clear any filters that may have been applied, then double-press on the [**Description**] field in one of the records.

Conference and Meeting Spaces

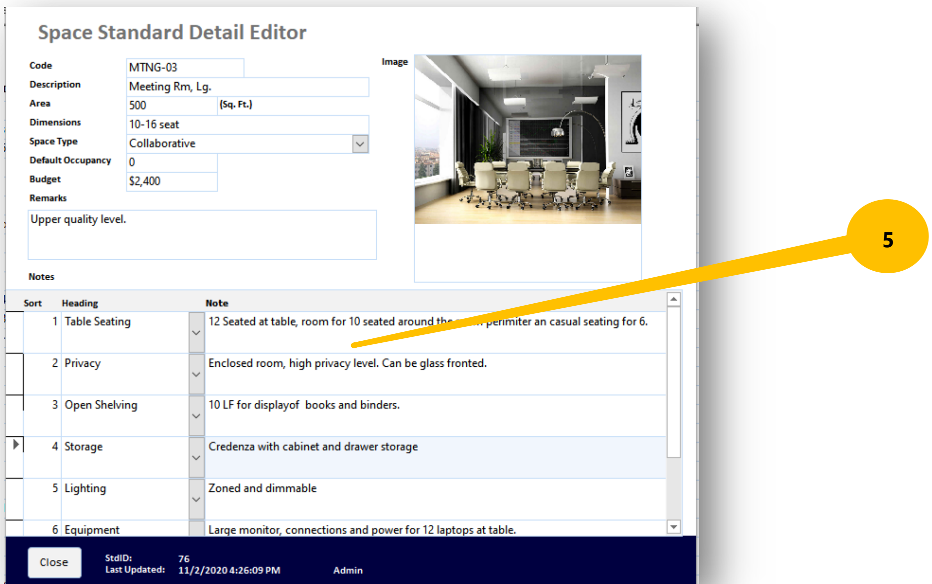
Earnest SRP provides lots of flexibility to accommodate different approaches to assigning conference and meeting spaces.

1. Start in the **Space Standards editor** and create a few generic space standards of different types and sizes. You can always add or modify the space standards as your work progresses.
2. Use the same '**Space Type**' (such as *collaborative* or *meeting*) for these, so that they will be reported together in the same section.
3. Try to keep the number of Space Standards to a minimum. The more generic the better for analyzing space utilization. The Space Standard can be differentiated and described in more detail when it is assigned.

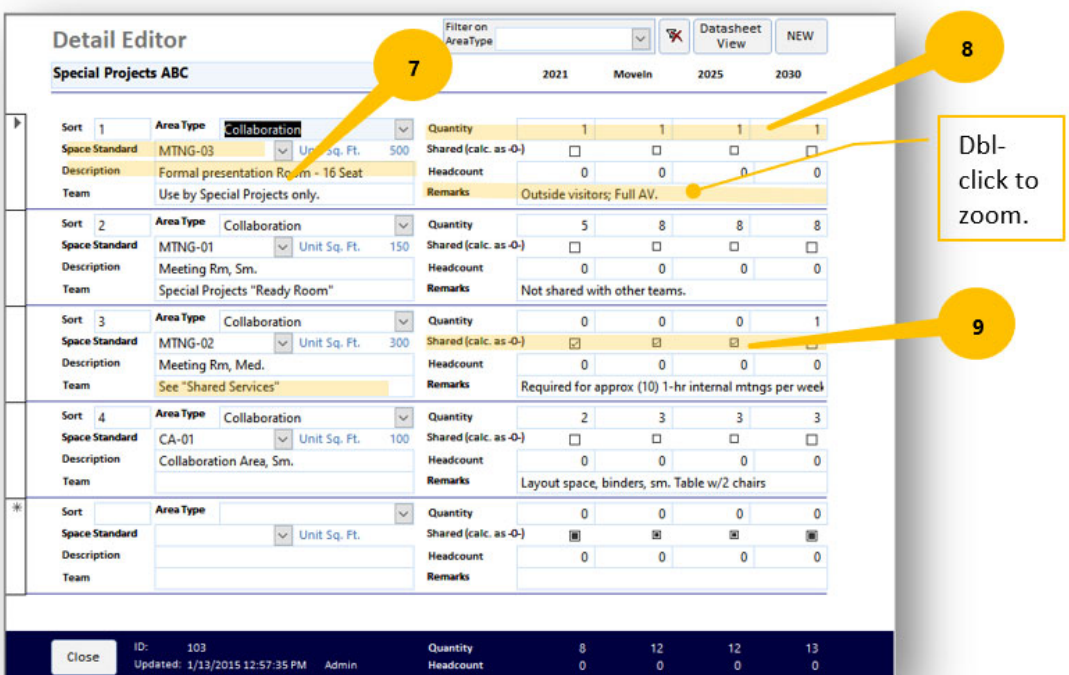


CODE	Description	Area (SF)	Dimensions	Space Type	Default Occupancy	Budget	Rem
BREAK	Break Out	600		Collaborative	0	$58,000	Supports single floor / up t
CA-01	Collaboration Area, Sm.	100	4-seat	Collaborative	0	$0	
CA-02	Collaboration Area, Med.	150	4-6 seat	Collaborative	0	$0	
MTNG-01	Meeting Rm, Sm.	150	2-4 seat	Collaborative	0	$0	
MTNG-02	Meeting Rm, Med.	300	6-8 seat	Collaborative	0	$15,000	Furniture configuration
MTNG-03	Meeting Rm, Lg.	500	10-16 seat	Collaborative	0	$0	
TELCOM	Tel./Com. Equipment Rm.	100		Core Support	0	$0	
EQ.01A	Projector unit	0	30 x 26	Equipment	0	$0	by owner
FL.02	Lateral File, 5 Dr.	0		Equipment	0	$0	
TRAIN-01	Training Rm, Sm	300	6-12 seat	Open	1	$0	
WKST.09	Special Workstation	60		Open	1	$0	

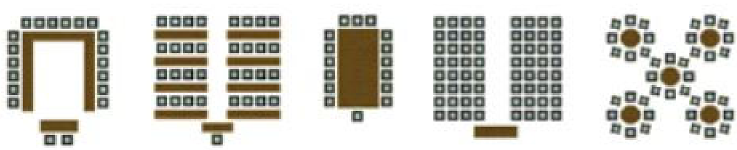
4. Go to the **Space Standard Detail editor** to add an image and any performance specifications.



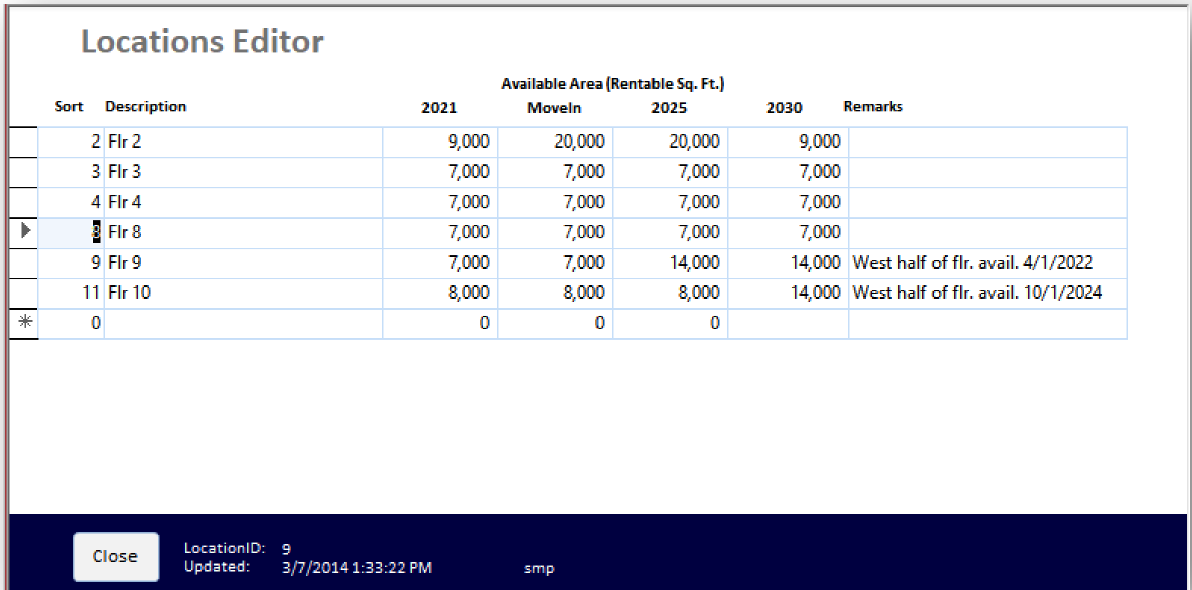
5. Use the **Notes** section to identify performance requirements and usage. Include a **Sort** number and **Heading** for each note. Double-press o the 'Note' field to open the zoom box.
6. Space Standards are assigned in the **Planning Group Detail editor** to various Planning Groups, and/or a Planning Group you create specifically for 'Shared Spaces'.
7. When you assign a **Space Standard**, the default description will be inserted. This can be overwritten with something more descriptive.
8. Don't forget to input the **Quantity** for each plan date (without quantities there will be no area calculation).



9. To share a single space with more than one Planning Group:
    - Assign it to the primary Planning Group,
    - Assign it to each of the other Planning Groups, and check the '**Shared'** check box – this will override the quantity and s.f. (will display as '0') so that it will be counted in calculations only once.
10. You may want to program all or most shared spaces together in a separate Planning Group (i.e. 'Shared Spaces'). This is best when there are few requests for dedicated spaces.
11. There are no magic tricks or rules-of-thumb when it comes to estimating the type, number and mix of conference and meeting rooms and there is no algorithm or automated calculator for this in Earnest SRP:
    - No two organizations are alike in the type or number of meeting spaces needed.
    - Perceived needs are often prejudiced by existing conditions and availability.
    - Planning a new facility is an opportunity to adjust meeting habits and space allocation.
12. Some of the considerations for the 'right' number and mix of conference and meeting spaces:
    - Casual vs formal spaces.
    - Board and Executive needs.
    - Presentations, guests and visitors.
    - Staff meetings.
    - Functional flexibility.
    - Ratio of private office to open plan workstations.
    - Floor plate size and shape.
    - Ceiling height
    - Windows / natural light
    - Audio/visual equipment.



Locations



Locations Editor

Sort	Description	2021	MoveIn	2025	2030	Remarks
		Available Area (Rentable Sq. Ft.)				
2	Flr 2	9,000	20,000	20,000	9,000	
3	Flr 3	7,000	7,000	7,000	7,000	
4	Flr 4	7,000	7,000	7,000	7,000	
8	Flr 8	7,000	7,000	7,000	7,000	
9	Flr 9	7,000	7,000	14,000	14,000	West half of flr. avail. 4/1/2022
11	Flr 10	8,000	8,000	8,000	14,000	West half of flr. avail. 10/1/2024
0		0	0	0		

Close

LocationID: 9
Updated: 3/7/2014 1:33:22 PM smp

From the **Main screen**, in the ‘Editors’ section, press the [**Locations**] button to open the Locations editor.

1. **Locations** are used to assign Planning Groups to a **Proposed Location.**
2. **Sort** determines the order in which notes are shown in reports.
3. **Description** is the name or description of the proposed location, which can be very general - like ‘North Tower’, or more specific - like ‘Flr.2, South quadrant’.
4. The **Available Area** field stores the amount of Area that is available for each of the locations for each of the planning dates. For instance, a floor may be only partially available for the first planning date, with the rest of the floor becoming available for the second.

Reporting

To run a Report

1. From the **Main screen**, in the '**Reports'** section, press the [**Reports**] button.
2. In the bottom section of the screen, you can adjust many of the report **Settings**.
3. Select the **Report** you want to run.
4. Press the [**Print Preview**] button at the top right of the screen (or double-press on it in the list).
    a. The **Report Filter** screen (where applicable) will be launched.

Report Settings

The following example showing report fields that user can set in the **Settings editor,** the **Reports screen, Report Filtering screen** and the **Reports editor**.

		Settings editor	**Reports screen**	**Report Filtering Screen**	**Reports editor**
	Report Title				X
	Report list sort order				X
	Report Header lines 1 - 4	X	X		
	Report Stamp	X	X		
	Report date and date format	X	X		
	Report page prefix, start number and format	X	X		
	Logo Image	X			
	Report Note / Filtering Description			X	
	Planning Date labels and show/hide	X	X		

Report Lists

There are two sets of **standard SRP Reports**. The reports with a **Landscape** orientation typically show up to four planning dates. The **Portrait** reports typically show one or two planning dates.

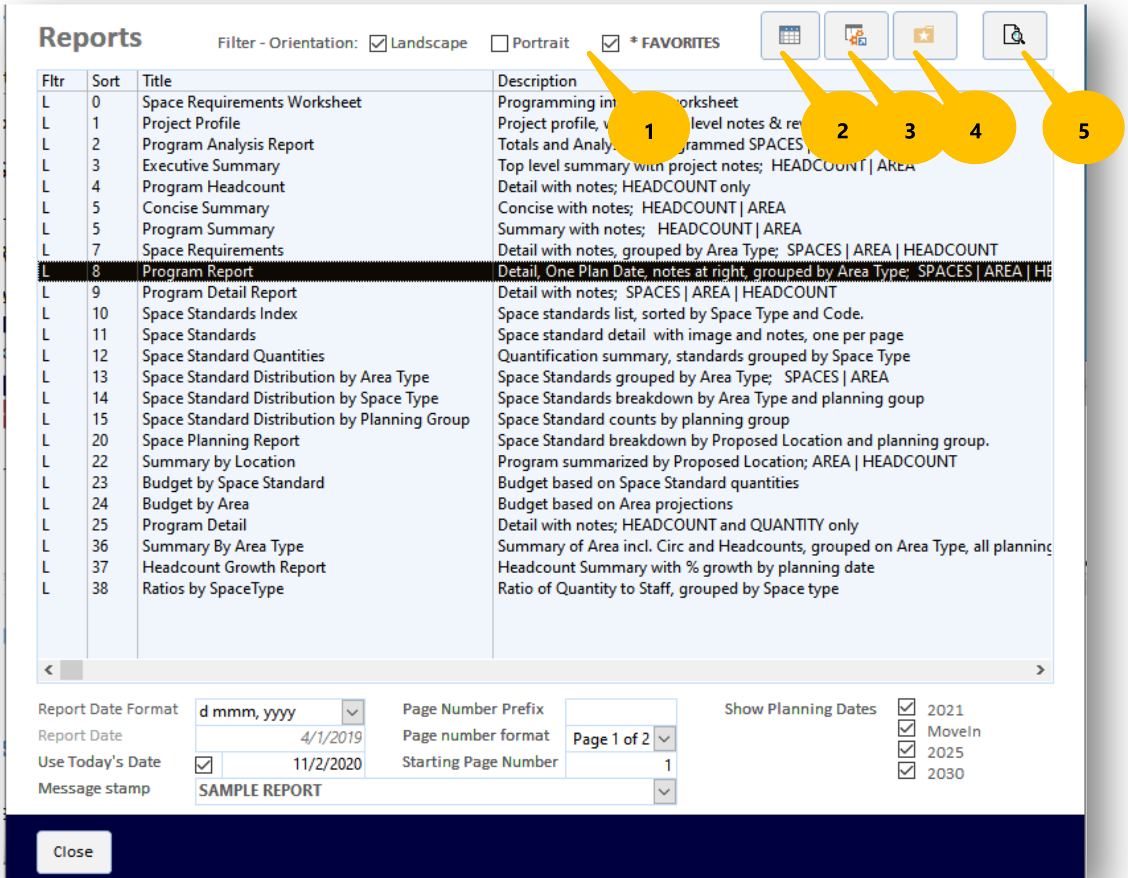
Landscape Layout Reports

Fltr	Sort	Title	Description
L	0	Space Requirements Worksheet	Programming interview worksheet
L	1	Project Profile	Project profile, with project level notes & revisions log
L	2	Program Analysis Report	Totals and Analysis of Programmed SPACES | AREA | HEADCOUNT
L	3	Executive Summary	Top level summary with project notes; HEADCOUNT | AREA
L	3.3	Executive Summary	Top level summary with AREA, Circulation, HEADCOUNT, Area per Person, and
L	4	Program Headcount	Detail with notes; HEADCOUNT only
L	5	Concise Summary	Concise with notes; HEADCOUNT | AREA
L	5	Program Summary	Summary with notes; HEADCOUNT | AREA
L	6	Program Details	Detail with notes; HEADCOUNT | AREA
L	7	Space Requirements	Detail with notes, grouped by Area Type; SPACES | AREA | HEADCOUNT
L	8	Program Report	Detail, One Plan Date, notes at right, grouped by Area Type; SPACES | AREA | HE
L	9	Program Detail Report	Detail with notes; SPACES | AREA | HEADCOUNT
L	10	Space Standards Index	Space standards list, sorted by Space Type and Code.
L	11	Space Standards	Space standard detail with image and notes, one per page
L	12	Space Standard Quantities	Quantification summary, standards grouped by Space Type
L	13	Space Standard Distribution by Area Type	Space Standards grouped by Area Type; SPACES | AREA
L	14	Space Standard Distribution by Space Type	Space Standards breakdown by Area Type and planning goup
L	15	Space Standard Distribution by Planning Group	Space Standard counts by planning group
L	20	Space Planning Report	Space Standard breakdown by Proposed Location and planning group.
L	22	Summary by Location	Program summarized by Proposed Location; AREA | HEADCOUNT
L	23	Budget by Space Standard	Budget based on Space Standard quantities
L	24	Budget by Area	Budget based on Area projections
L	25	Program Detail	Detail with notes; HEADCOUNT and QUANTITY only
L	36	Summary By Area Type	Summary of Area incl. Circ and Headcounts, grouped on Area Type, all planning
L	37	Headcount Growth Report	Headcount Summary with % growth by planning date
L	38	Ratios by SpaceType	Ratio of Quantity to Staff, grouped by Space type

Portrait Layout Reports

Fltr	Sort	Title	Description
P	30	Project Profile	Project profile, with project level notes & revisions log, Portrait
P	31	Program Index	List of planning groups, contacts, primary note fields, Portrait
P	32	Space Standards Index	Space standards list, sorted by Space Type and Code.
P	33	Space Standards	Space Standards detail, with image and notes, one per page
P	40	Program Analysis	Totals; 1st two Plan Dates
P	41	Concise Summary	Concise Summary; 1st two plan dates, HEADCOUNT | AREA
P	41.3	Concise Summary	Concise Summary; 1st three plan dates, HEADCOUNT | AREA
P	42	Program Summary	Summary; 1st two plan dates, with Notes, Area Type, HEADCOUNT | AREA
P	43	Program Detail Report	Detail with notes, 1st two Plan Dates, grouped by Area Type; SPACES | AREA | H
P	44	Program Detail Report	Detail with notes, 1st two Plan Dates, grouped by Area Type; SPACES | HEADCO
P	45.3	Program Detail Report	Detail with notes, 1st three Plan Dates, grouped by Area Type; HEADCOUNT |SP.
P	47	Summary by Proposed Location	Program summarized by Proposed Location; 1st two Plan Dates; HEADCOUNT |
P	48	Budget by Space Standard	Budget based on Space Standard quantities; 1 plan date
P	49	Budget by Area	Budget based on Area projections; 1 plan date
P	50	Program Totals	Planning group Totals; 1 plan date; SPACES | HEADCOUNT | AREA
P	51	Program Totals - Assigned Spaces	Planning group Totals; 1 plan date; 'Occupied space' only; SPACES | HEADCOU
P	52	Program Detail Report	Planning group Detail; 1 plan date, grouped by Area Type; SPACES | AREA | HEA
P	53	Headcount Growth Report	Headcount Summary with % growth by planning date
P	60	Adjacencies	Adjacency notes, Summary Level; 1 plan date
P	61	Adjacencies	Adjacency notes, Lowest Level; 1 plan date
P	62	Ratios by SpaceType	Ratio of Quantity to Staff, grouped by Space type

Reports screen



Top Section

1. Select the check boxes for **Report Orientation** ([**Landscape**] or [**Portrait**]), and whether to view all Reports or just the [**Favorites]**.
2. Press the [**Reports Matrix**] button to see the specific characteristics of each report.
3. Press the [**Settings**] button to display the **Settings editor**.
4. Press the [**Reports List editor**] button, to display the **Reports List editor**, where you can select or deselect **Favorites**, change **Report Titles** and the **Sort** order for the Reports List.
5. Press the [**Print Preview**] button to run the Report selected in the **Reports List**.

Reports Matrix screen

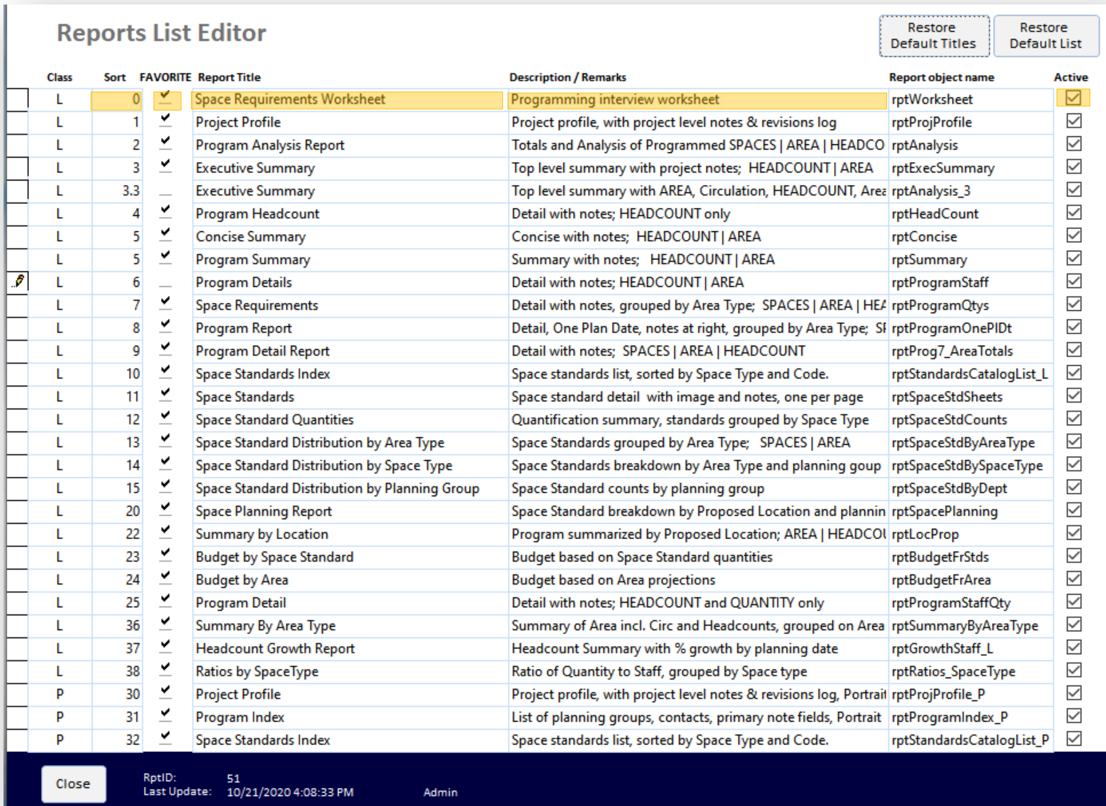
1. This screen displays all the reports available, and the specific characteristics and data points included in each (such as the fixed ID and report name, and whether it includes Staff counts, Notes, etc).
2. This screen is to help you to choose which report(s) suit your needs, and is for reference only (does not permit editing).

frmRptMatrix

RptID	Active	RptName	Favorite	Layout	SortNmb	RptTitle	Granularity	SpaceQty	Area	Headcout	Budget	Notes	Max PlanDates
62	True	rptWorksheet	☑	L	0	Space Requirements Worksheet	Detail	☐	☐	☐	☐	☑	4
52	True	rptProjProfile	☑	L	1	Project Profile	Summary	☐	☐	☐	☐	☑	4
55	True	rptAnalysis	☑	L	2	Program Analysis Report	Summary	☑	☑	☑	☐	☐	4
53	True	rptExecSummary	☑	L	3	Executive Summary	Summary	☐	☑	☑	☐	☑	4
95	True	rptAnalysis_3	☐	L	3.3	Executive Summary	Summary	☑	☑	☑	☐	☑	4
74	True	rptHeadCount	☑	L	4	Program Headcount	Detail	☐	☐	☑	☐	☑	4
73	True	rptConcise	☑	L	5	Concise Summary	Summary	☐	☑	☑	☐	☑	4
63	True	rptSummary	☑	L	5	Program Summary	Summary	☐	☑	☑	☐	☑	4
51	True	rptProgramStaff	☐	L	6	**Program Details**	Detail	☐	☑	☑	☐	☑	4
64	True	rptProgramQtys	☑	L	7	Space Requirements	Detail	☑	☑	☑	☐	☑	4
65	True	rptProgramOnePlDt	☑	L	8	Program Report	Detail	☑	☑	☑	☐	☑	4
75	True	rptProg7_AreaTotals	☑	L	9	Program Detail Report	Detail	☑	☑	☑	☐	☑	4
78	True	rptStandardsCatalogList_L	☑	L	10	Space Standards Index	Detail	☑	☑	☑	☐	☐	
59	True	rptSpaceStdSheets	☑	L	11	Space Standards	Detail	☐	☑	☐	☐	☑	
56	True	rptSpaceStdCounts	☑	L	12	Space Standard Quantities	Detail	☑	☐	☐	☐	☐	4
68	True	rptSpaceStdByAreaType	☑	L	13	Space Standard Distribution by Area Typ	Summary	☑	☑	☐	☐	☐	4
67	True	rptSpaceStdBySpaceType	☑	L	14	Space Standard Distribution by Space Ty	Summary	☑	☑	☐	☐	☐	4
79	True	rptSpaceStdByDept	☑	L	15	Space Standard Distribution by Planning	Summary	☑	☐	☐	☐	☐	4
61	True	rptSpacePlanning	☑	L	20	Space Planning Report	Detail	☑	☑	☐	☐	☐	4
60	True	rptLocProp	☑	L	22	Summary by Location	Summary	☐	☑	☑	☐	☐	4
57	True	rptBudgetFrStds	☑	L	23	Budget by Space Standard	Detail	☑	☐	☐	☑	☐	4
58	True	rptBudgetFrArea	☑	L	24	Budget by Area	Detail	☐	☑	☐	☑	☐	4
86	True	rptProgramStaffQty	☑	L	25	Program Detail	Detail	☑	☐	☑	☐	☑	4
85	True	rptSummaryByAreaType	☑	L	36	Summary By Area Type	Summary	☐	☑	☑	☐	☐	4
104	True	rptGrowthStaff_L	☑	L	37	Headcount Growth Report	Summary	☐	☐	☑	☐	☐	4
106	True	rptRatios_SpaceType	☑	L	38	Ratios by SpaceType	Summary	☑	☐	☐	☐	☐	4
105	True	rptProjProfile_P	☑	P	30	Project Profile	Summary	☐	☐	☐	☐	☑	
82	True	rptProgramIndex_P	☑	P	31	Program Index	Detail	☐	☐	☐	☐	☐	
91	True	rptStandardsCatalogList_P	☑	P	32	Space Standards Index	Detail	☐	☑	☐	☑	☐	
109	True	rptSpaceStdSheets_P	☑	P	33	Space Standards	Detail	☐	☑	☐	☑	☐	
92	True	rptAnalysis_P	☑	P	40	Program Analysis	Summary	☑	☑	☑	☐	☐	2
96	True	rptConcise_P	☑	P	41	Concise Summary	Summary	☐	☑	☑	☐	☐	2
102	True	rptConcise3_P	☑	P	41.3	Concise Summary	Summary	☑	☑	☑	☐	☐	3
88	True	rptSummary_P	☑	P	42	Program Summary	Summary	☐	☑	☑	☐	☑	2
87	True	rptProgramQtys_P	☑	P	43	Program Detail Report	Detail	☑	☑	☑	☐	☑	2
98	True	rptProgramQtys2_P	☑	P	44	Program Detail Report	Detail	☑	☑	☑	☐	☑	2
101	True	rptProgramQtys3_P	☑	P	45.3	Program Detail Report	Detail	☑	☑	☑	☐	☑	3
100	True	rptLocProp_P	☑	P	47	Summary by Proposed Location	Summary	☐	☑	☑	☐	☐	2
93	True	rptBudgetFrStds_P	☑	P	48	Budget by Space Standard	Summary	☑	☐	☐	☑	☐	4
94	True	rptBudgetFrArea_P	☑	P	49	Budget by Area	Summary	☐	☑	☐	☑	☐	1
81	True	rptProgramTotals_P	☑	P	50	Program Totals	Summary	☑	☑	☑	☐	☐	1
84	True	rptProgramTotals_P_OCC1	☑	P	51	Program Totals - Assigned Spaces	Summary	☑	☑	☑	☐	☐	1

Record: 1 of 47 No Filter Search

Reports List editor


Reports List Editor

Restore Default Titles

Restore Default List

Class	Sort	FAVORITE	Report Title	Description / Remarks	Report object name	Active
L	0	✓	Space Requirements Worksheet	Programming interview worksheet	rptWorksheet	☑
L	1	✓	Project Profile	Project profile, with project level notes & revisions log	rptProjProfile	☑
L	2	✓	Program Analysis Report	Totals and Analysis of Programmed SPACES | AREA | HEADCO	rptAnalysis	☑
L	3	✓	Executive Summary	Top level summary with project notes; HEADCOUNT | AREA	rptExecSummary	☑
L	3.3		Executive Summary	Top level summary with AREA, Circulation, HEADCOUNT, Area	rptAnalysis_3	☑
L	4	✓	Program Headcount	Detail with notes; HEADCOUNT only	rptHeadCount	☑
L	5	✓	Concise Summary	Concise with notes; HEADCOUNT | AREA	rptConcise	☑
L	5	✓	Program Summary	Summary with notes; HEADCOUNT | AREA	rptSummary	☑
L	6		Program Details	Detail with notes; HEADCOUNT | AREA	rptProgramStaff	☑
L	7	✓	Space Requirements	Detail with notes, grouped by Area Type; SPACES | AREA | HEA	rptProgramQtys	☑
L	8	✓	Program Report	Detail, One Plan Date, notes at right, grouped by Area Type; SF	rptProgramOnePlDt	☑
L	9	✓	Program Detail Report	Detail with notes; SPACES | AREA | HEADCOUNT	rptProg7_AreaTotals	☑
L	10	✓	Space Standards Index	Space standards list, sorted by Space Type and Code.	rptStandardsCatalogList_L	☑
L	11	✓	Space Standards	Space standard detail with image and notes, one per page	rptSpaceStdSheets	☑
L	12	✓	Space Standard Quantities	Quantification summary, standards grouped by Space Type	rptSpaceStdCounts	☑
L	13	✓	Space Standard Distribution by Area Type	Space Standards grouped by Area Type; SPACES | AREA	rptSpaceStdByAreaType	☑
L	14	✓	Space Standard Distribution by Space Type	Space Standards breakdown by Area Type and planning goup	rptSpaceStdBySpaceType	☑
L	15	✓	Space Standard Distribution by Planning Group	Space Standard counts by planning group	rptSpaceStdByDept	☑
L	20	✓	Space Planning Report	Space Standard breakdown by Proposed Location and plannin	rptSpacePlanning	☑
L	22	✓	Summary by Location	Program summarized by Proposed Location; AREA | HEADCOI	rptLocProp	☑
L	23	✓	Budget by Space Standard	Budget based on Space Standard quantities	rptBudgetFrStds	☑
L	24	✓	Budget by Area	Budget based on Area projections	rptBudgetFrArea	☑
L	25	✓	Program Detail	Detail with notes; HEADCOUNT and QUANTITY only	rptProgramStaffQty	☑
L	36	✓	Summary By Area Type	Summary of Area incl. Circ and Headcounts, grouped on Area	rptSummaryByAreaType	☑
L	37	✓	Headcount Growth Report	Headcount Summary with % growth by planning date	rptGrowthStaff_L	☑
L	38	✓	Ratios by SpaceType	Ratio of Quantity to Staff, grouped by Space type	rptRatios_SpaceType	☑
P	30	✓	Project Profile	Project profile, with project level notes & revisions log, Portrait	rptProjProfile_P	☑
P	31	✓	Program Index	List of planning groups, contacts, primary note fields, Portrait	rptProgramIndex_P	☑
P	32	✓	Space Standards Index	Space standards list, sorted by Space Type and Code.	rptStandardsCatalogList_P	☑

Close

RptID: 51

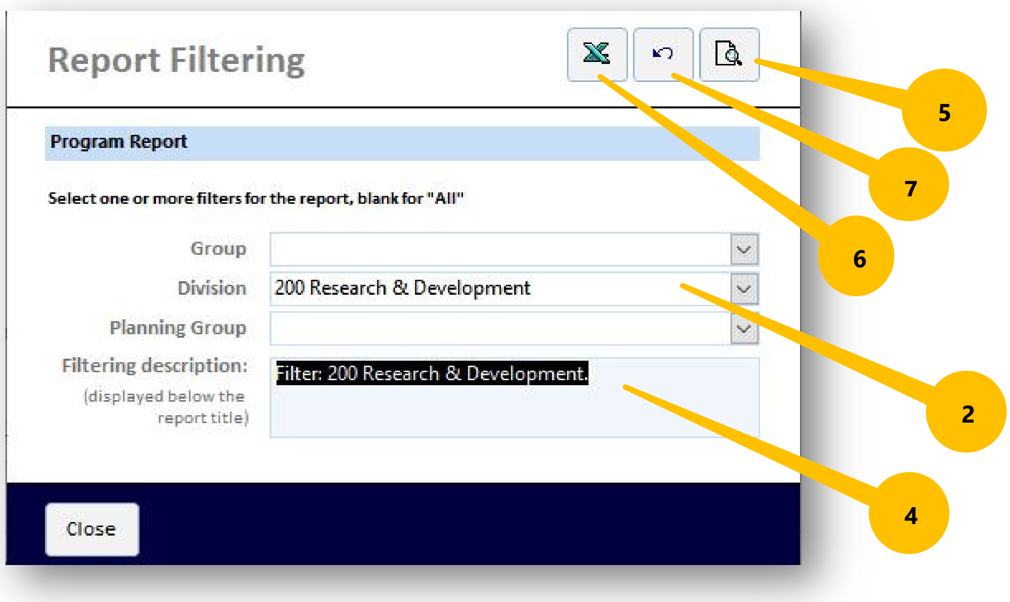
Last Update: 10/21/2020 4:08:33 PM Admin

From the **Main screen**, ‘**Reporting**’ section, press the [**Edit Report List**] button to open the **Reports List editor**.

1. **Class** identifies the report as ‘**L**’ (Landscape) or ‘**P**’ (Portrait).
2. You can change the **Report Title** of a Report.
3. You can change the **Favorite** status of a Report.
   a. When the box is checked, the report will appear in the **Reports List** when the **Filter** is set to ‘**Favorites’**, when un-checked it will be hidden.
4. You can change the **Sort** order for the **Reports List**.
5. You can change the **Description** of a Report.
6. The **Report object name** is fixed (cannot be edited) and it is not displayed on Reports.
7. You can change the **Active** status of a Report.
   a. When the box is checked, the report will appear in the **Reports List**, when un-checked it will be hidden.

Report Filtering screen

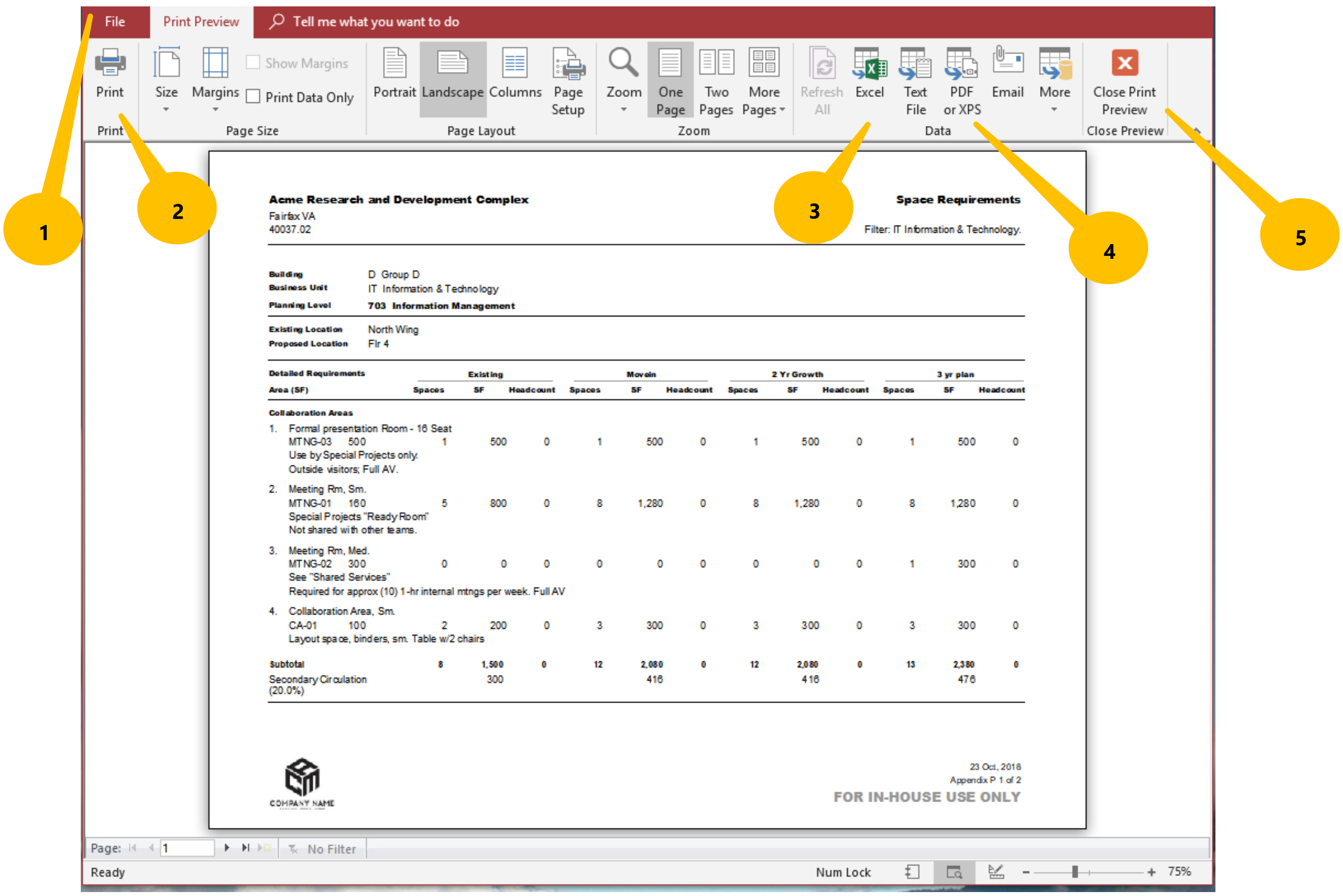
From the **Main screen**, in the 'Reports' section, press the [Reports] button, from the **Reports screen** select the report you want to run and press the [Print Preview] button. If filtering is applicable to the report, the **Report Filtering screen** will be displayed.



1. Most of the Reports in **SRP** can be filtered on a set of criteria selected by the user when the Report is run. The **Report Filtering screen** and the criteria choices available vary slightly depending upon which **Report** you are running.
2. If you want to **Filter** on a specific set of data, select the criteria from the **Criteria combo box** lists.
3. If Filtering is not desired, leave all the criteria boxes blank.
4. The **Filtering description** will automatically reflect the criteria you have selected, and it will be displayed in the **Report** page header section.
   a. If you do not want to display this information in the Report, you can delete the text from the text box by selecting it and pressing your [Delete] key, or otherwise type in the text you do want to have displayed.
5. When you are satisfied with the filtering selections press the [**Print Preview**] button at the top right of the screen to run the Report.
6. If the Report is available to be **exported** in Excel format, press the [**Excel**] button at the top of the screen.
7. To clear the filtering selections, press the [**Undo**] button.

Report Print Preview screen

All reports in SRP are launched in **Print Preview**, so that the user can view the report prior to sending it to a printer.



To Print a report

1. To select certain pages or a specific printer, from the menu bar at the top of the screen select '**File**', '**Print**', and choose the appropriate settings.
2. If the default printer is appropriate, and you don't need to see the printer settings, press the [**PRINT**] button in the ribbon.
3. If you want to export the data from the report to Excel, press the [**Excel]** button in the ribbon.
4. If you want to create a PDF of the report, press the [**PDF**[button in the ribbon
   a. You may need to expand the width of the window to see all the buttons available in the ribbon.
5. If you want to change the **Report Settings** prior to printing the report, **cancel Print Preview** by pressing the [**Close**] button at the top of the screen.