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About FSI

FSI (FM Solutions) Limited has been designing, developing and delivering Computer Aided Facilities Management (CAFM) software solutions since 1990. The company offers a full range of accompanying professional services, including the provision of project management, implementation consultancy, technical consultancy and training. Our focus is upon helping you, the Client, increase productivity through the effective implementation and utilisation of your software.

Disclaimer

Information presented within this document is subject to change without notice and does not represent a commitment on the part of FSI (FM Solutions) Limited. Every effort is taken to ensure the accuracy of information contained within this document. However, should you discover any discrepancies within this document, please contact us at the address above.

E&OE
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Introduction to Concept Evolution

FSI (FM Solutions) Limited was established in 1990 and remains the market-leading Facilities Management (FM) software provider. The Concept range of Computer Aided Facilities Management (CAFM) software solutions are wholly owned, developed, implemented and supported by FSI.

The full portfolio of the FSI Group of Companies is as follows:

- FSI (FM Solutions) Middle East FZ-LLC: est. 2002. Providing the Concept™ CAFM range to the GCC and the MENA region
- FSI (FM Solutions) APAC Pty Ltd: est. 2010. Providing Concept Facilities Management Solutions to Australia and the Asia Pacific regions
- MMB Software Limited: est. 2009. Providing the Room Management System (RMS) to the UK, European and Global markets

FSI also has an international Partner network; all ensuring we maintain our status as a global leader in the design and delivery of FM software solutions.

Concept Evolution from FSI is a completely web-based CAFM solution. Deployable regardless of borders and accessible from anywhere via a standard web browser, Concept Evolution removes the costs and complexities of alternative solutions.

Easy and cost-effective to deploy and sustain, Concept Evolution ranges from a single-property to enterprise basis, and is used globally by many major Service Providers and direct organisations.

Concept Evolution provides clients with a total platform for the design, development and implementation of their rapidly evolving FM strategies, and delivers vital information to FM professionals and colleagues responsible for the provision of a wide variety of building services and asset management.

FSI has developed in close parallel with the rise of FM as a core business function, keeping abreast of constantly changing requirements for new services, training and support. Indeed, our Research & Development team accounts for 25% of FSI personnel, ensuring we continue developing Concept Evolution to FM requirements.

The emergence of PFI/PPP projects that span the public and private sectors has had a major impact on the FM market, creating opportunities for clients to provide increasingly sophisticated hard and soft services for implementations that are redefining the role of FM. Our strong presence in this aspect of the market is no coincidence and our expertise is second to none. Concept Evolution unites the full spectrum of hard and soft services, from hard engineering through to soft services.

FSI has a reputation for forging strong, dynamic, long-term relationships with our clients which is evident through our extensive case study portfolio.

FSI has been a Microsoft Gold partner since 2006, the first CAFM company to achieve this status. The Microsoft Gold status was awarded to FSI in recognition of our knowledge, skills and commitment to implementing technology solutions to match the Facilities Management business needs.

Following a review of their partner scheme, Microsoft launched a new Partner Competencies Programme. As part of the new programme, FSI achieved the following Gold Partner Competencies: Gold Independent Software Vendor (ISV), Gold Data Platform and Gold Business Intelligence.

FSI has proven to be an organisation with the highest, most consistent capability and commitment within the Facilities Management industry. Concept Evolution has undergone a rigorous and auditable approval process to demonstrate value to clients. As a result, Concept Evolution is certified for Windows Server® 2008 R2.

Concept Evolution provides clients with a total platform for the design, development and implementation of their rapidly evolving FM strategies, and delivers vital information to FM professionals and colleagues responsible for the provision of a wide variety of building services and asset management.
Within Concept Evolution, FSI has enhanced the features and functionality available in the Concept SQL/500 range, and has retained an element of compatibility allowing simultaneous use of both applications. Easily accessed through a Web browser, Concept Evolution offers an extremely powerful, flexible, and easy-to-use software platform that leverages the Web to provide new and enhanced capabilities for users. Functionality includes:

- **Locales** – which provides users with the capability to define their language, country, and any special variant preferences for their user interface; for example language, number and currency formats, and datetime settings. Concept Evolution also supports a right-to-left display within the product.

- **Translation Sets / Strings** – which provides users with the capability to replace standard Concept Evolution descriptors. For example, field names and window labels can be amended to display country / organisation specific terminology on a user by user basis thus providing true multi-national capabilities within a single system deployment.

- **Table Register** – which provides administration users with access to the complete database design from within the system. For every table, it is possible to define whether or not documents, hazards, attributes and properties can be held against the table. Additionally, each field within the table can be defined as searchable, requiring a unique value, and whether an audit trail should be defined for field changes. Powerful validation rules, including regular expressions (RegEx) may now be implemented to ensure that Concept Evolution operates on clean, correct and useful data.

- **Grid Control** – throughout the system a common user interface provides users with a view of the data held within the Concept Evolution database. On a user by user basis specific fields can be displayed for a particular set of data, i.e. assets, tasks etc, and the order in which they appear can also be specified. Column widths are easily adjusted and retained by the system upon reopening the window, and column data can be sorted by simply clicking on any column header. Data may be retrieved using the new quick search function, by filtering column data, or by utilising the powerful system and user query functionality. Once retrieved data may be printed or exported effortlessly to Microsoft Excel.

- **Caches** – which minimise access times to key underlying data elements, i.e. translation strings, user accounts, validation rules, etc, in simple terms the caches reduce the need to continually re-fetch the same set of data from the database.

- **Queries** – enhance quick search and column filtering functionality by allowing users to define, store, and retrieve database searches containing comprehensive selection criteria. Concept Evolution is supplied with an extensive list of standard queries, which may be further enhanced by users on a system wide or individual user level.

- **User Accounts** – provide a high level of granularity for system administrators to control individual access to the Concept Evolution system. It is possible to specify across the system whether a user has the capabilities to create, read, update and delete (CRUD) database records. In addition, a specific deny permission can be set for appropriate functions.

- **User Roles** – to simplify the administration of multiple users, specific functional roles can be created. A role is a collection of permissions and authorisation rights, including financial limits and published reports, which can be assigned to multiple users who carry out a certain function i.e. helpdesk operators. Concept Evolution also offers the capability to indicate that a particular user, or group of users, are considered a named account rather than a concurrent account. This guarantees those users a connection to the system by reserving a database connection for them at all times, ensuring those who require access to the system can gain access.

- **User Interface** – is one of the most important aspects of any software application. Concept Evolution takes advantage of the benefits of being a web based application, yet retains familiarity with the Concept SQL/500 range.

- **Document Management** – users can define multiple repositories (centralised file storage areas) either locally or on the network. Once a document is identified it can be automatically associated with a repository thus reducing the need to search for file paths, speeding up the retrieval process. Furthermore, support for multiple internet media types (MIME) has been included providing greater flexibility for users.

- **Multi-database support** – Multiple Database Application (MDA) provides both physical and logical segregation of data by allowing instant access from within a single instance of Concept Evolution to one or more host databases. A major benefit of the MDA is that operational and historic data can be logically segregated thereby ensuring users can quickly and efficiently access historic information without having to filter such data during normal day to day operations.

- **Contract Groups** – within Concept Evolution, a contract can now be assigned to one or more contract groups. This means that a more granular and flexible approach to accessing FM data can be achieved on a regional, service line or property portfolio basis.

- **Contract Views** – data segregation has always been a key component of Concept CAFM solutions. Within Concept Evolution a further layer of segmentation has been added for assets. It is now possible to associate particular asset tags with one or more contracts.

- **Customer Satisfaction Audit** – includes functionality for multiple questions and responses including multiple ratings and different templates for different customer feedback and audit requirements.

- **PPM Planner** – a fully web enabled PPM Planner is available for Concept Evolution which has the ability to display all contract groups, a contract group or a specific contract. Further filters are applied for other key data entities in order to provide a focused view of forthcoming planned maintenance activities.
Concept Evolution consists of a set of core elements to which one or more application packs and tailored solutions can be applied. There are two user licence types available: concurrent or named users, and four levels of Concept Evolution systems:

- Evolution Plus
- Evolution
- Evolution Lite
- Evolution Book

Application Packs include:
- Asset, PPM and Helpdesk
- Asset and PPM
- Asset and Helpdesk
- Helpdesk
- Resource Booking

Core functional elements of the Concept Evolution platform include:
- Base Service Level Agreement Control*
- Buildings & Property Register
- Compliance Task Control
- Concept Reports
- Contact Management
- Contract Management
- Customer Satisfaction Audit
- Document Management
- Finance (cost centres, cost codes)
- Health & Safety Notes
- Planned Events Diary
- Resource Planner
- Resource and Skills Register
- Shift and rota patterns
- Supplier Register
- System and user queries
- Task window
- Timesheets
- User accounts and roles
- Work permits

*enhanced SLA Module available for Concept Evolution Plus only.

Modules:
Optional integrated modules available for Concept Evolution include:
- CAD Connect**
- Concept Connect Self Service Portal
- Concept Reach Self Service Portal
- Crystal Connect
- Digital Dashboard
- Facilities Booking
- FSI GO
- HVCA Instruction Set Import Utility
- Import Utility
- Live View
- Mobile Solutions***
- Multi Database Support
- Orders
- PEMS
- Quotes
- Sales Invoicing
- SLA Advanced
- Stores
- Utilities
- Visitor Management
- Visual Booking
- Workflow Lite / Workflow Pro

** Requires separate installation of AutoDesk® AutoCAD or Architectural Desktop for operation.

*** A number of mobile workforce options are available for Concept Evolution.

- FSI GO is a software platform for Mobile Application development. Providing flexibility and agility, users can build fully customised mobile solutions, extending the functionality of both Concept Evolution and third party integrated systems.
- Cognito FormsPlus provides scalable field mobility applications for use with Concept Evolution.
Helpdesk

Concept Evolution provides fully integrated functionality for logging facilities and maintenance requests against contracts and services. The system allows works to be tracked seamlessly from instigation to completion, and provides a flexible call handling solution for implementing a helpdesk facility at any level required by an organisation.

A standard helpdesk is included with all Concept Evolution versions and functionality packs. An advanced helpdesk, which is more fully described below, extends the capabilities and functionality of the helpdesk system. From a single user stand-alone helpdesk, to multi-site, multi-user call centres with high call volumes, FSI and Concept Evolution can provide a solution appropriate to the requirement.

The business logic integral to Concept Evolution enables the user to define completely how the system reacts when a request for service is received, ensuring all necessary information is captured quickly and efficiently from the outset. The helpdesk provides the flexibility to capture, for a given service request, all pertinent data with minimal input. Selection of a service line, building, person etc will filter and display a distinct list of pertinent data in other helpdesk fields or auto populate a field if discreet data exists. Consistency of data capture through the use of compulsory fields ensures that operational performance reporting is based on standardised data.

For example a call may be logged simply by selecting a caller’s name and the issue they are reporting from a standardised list. Concept Evolution can then generate the reporter’s full contact details including telephone number, email address, building and location. Additionally, from the standard problem, the business rules of Concept Evolution will determine the priority, category of work and discipline of resource required to action the issue. This capability can be augmented through Computer Telephony Integration (CTI) whereby a caller’s details can be automatically populated within the helpdesk before the telephone is answered.
Helpdesk

In addition, the ability to define the order in which users can tab from field to field allows the administrator to drive efficiency of data capture in line with business process.

To further drive the quality of information capture in relation to the issue at hand, Concept Evolution can also be configured to provide prompts for the helpdesk operator to ask for all pertinent information from the reporter. Relevant responses can be captured and then made available to resources or service providers via job cards, handheld devices or automated messaging.

Concept Evolution therefore drives business process by ensuring that all necessary information is captured during initial contact, effectively maximising the possibility of first time fix, thereby reducing the possibility of unnecessary and potentially costly follow-up visits.

Following initial call capture the helpdesk operator, where business process dictates, is able to manage the full life cycle of the call. Suitable resources, automatically filtered through the system business rules, can be allocated within the helpdesk, and all SLA times monitored through an easy to interpret visual pass/fail indicator. Additionally, the helpdesk provides the ability to build an auditable management information trail through the definition of “call events”. These are planned activities or actual events in the life cycle of the call, for example a delay to completion of the job through lack of access or unavailability of appropriate parts would be captured as an actual event. A subsequent reminder to chase a supplier for parts in one weeks time would be entered as a planned event.

Other key features of the Concept Evolution Helpdesk:

- Raise purchase orders, subject to appropriate financial limits.
- Review stock used/allocated.
- Monitor task costs.
- Review and complete time records.
- Review the audit trail (this being fully definable).
- Associate and open documents.
- Raise Customer Satisfaction Feedback (CSF) forms.
- System generated references for each task.
- Comprehensive reporter (or authorised reporter) and postcode search.
- Automatic duplicate call checker (with definable criteria).
- Task authorisation.
- Copy / link call for tracking multiple trades against a single call request.
- Qualified / available resource display and quick select.
- Fast timesheet assignment and completion.
- Operative "to do" list by job.
- Work permits.
- Review of expenses.
- Asset association for capture of lifecycle history.
- Automatic overview of similar works, by building, contract or linked asset.
- User defined information display area.
- Comprehensive search facility including historical job review.
- Automated/manual email and/or SMS text message issue (requires Workflow Lite).

Concept Evolution therefore drives business process by ensuring that all necessary information is captured during initial contact, effectively maximising the possibility of first time fix, thereby reducing the possibility of unnecessary and potentially costly follow-up visits.
Task Management

Concept Evolution manages cyclical and reactive tasks in a single overview, configurable to each user’s preferences through the standard grid control.

A high level system generated status for each task, together with user defined levels of completion provide a complete picture of task progress from instigation through to completion. At any stage the overall task list can be filtered using column headers, and information can be easily retrieved using the quick search function. Should more comprehensive task retrieval criteria be required the powerful system and user query functions can be used. At any stage, the user can print a snapshot of the task list or export the task list directly to Microsoft Excel.

When a task is logged by the helpdesk or a cyclical planned task is activated, the task information is automatically displayed in the task list of particular users or user groups. As this task data is shared and automatically updated as users process a task through its life cycle, the need for paper based systems with their associated administration costs is removed. Through internally defined message alerts users can be updated with pertinent information relating to work they are responsible for or involved with. Stakeholders can also be automatically informed of relevant information relating to ongoing works via automated email or text messaging.

Concept Evolution provides the capability to manage workforce labour patterns through the definition of shift and rota patterns against which a resource’s commitment and availability can be managed. Statutory holidays together with individual resource absences are taken into account through the rota window when allocating resources to tasks.

Tasks can be easily identified and selected for allocation to either direct labour or service providers for progression. Corresponding task information can be issued using a number of mechanisms including printed media (local and networked), email, SMS text, electronic facsimile, or through deployment to Mobile Maintenance solutions. Please note that email, SMS text and electronic facsimile solutions require the Workflow Lite module. Mobile Maintenance solutions include FSI’s own in-house range of applications as well as Cognito (for further details please refer to the Concept Evolution Modules section).

In-house personnel and service providers can also view task details from any location using the Internet or an Intranet via the self-service portal, Concept Self Service Portal.

Each task has a Service Level Agreement that displays the estimated completion time against which task progress can be monitored. A five-colour traffic light system can be defined by each user to represent time left until estimated completion time. This ensures that overdue jobs or jobs about to breach will be effectively highlighted to the user.

Upon completion of work, administration personnel, resources and sub contractors are able to feedback time and material data through a specified time period by a resource or subcontractor can be compiled and updated/amended through the timesheet functionality.

Resource Planner

Resource Planner allows for the organising and planning of work orders. Users can instantly determine available resources via the graphical planner, which provides a high level overview of availability for multiple engineers, whilst visibility of their skills and disciplines ensures the correct engineer is assigned to action work orders.

Holiday/absence dates and times can be added to the planning calendar, whilst optional notes can be placed against individual engineers or groups of engineers for specific dates. These are displayed at the top of the planning calendar, to act as a reminder of specific issues or events occurring.

The planning calendar automatically allocates a default minimum time slot for work orders where an estimated completion time is not known and constantly checks whether adequate timeslots for the completion of tasks have been selected, based on the known criteria for completing tasks.

Using drag-and-drop functionality, tasks copied into diaries via the Resource Planner (as well as tasks created or amended directly in diaries), are automatically updated in Concept.

A colour-code can be set for diary entries based on various criteria, including high priority tasks, tasks by contract, holiday / absence / sickness dates etc. A colour legend is available in the tool bar as a reminder of the colour-code.

Resource Planner provides three planner levels:

- Single Engineer Week View (SEWV): for the assignment of work orders and absences, by both drag and drop and manual assignment.
- Multi Engineer Day View (MEDV): additionally to SEWV, work orders can be moved from one engineer to another.
- Multi Engineer Week View (MEWV): provides a summary and navigation to both the SEWV and MEDV planners.

Features of Resource Planner include:

- Allocation of multiple disciplines to resources.
- Configurable planner, by start of working week, hours per day, etc.
- Configurable diary entry colours for sickness, breakdowns, PPM’s, etc.
- Estimated travel times displayed as separate entities, but still connected to the diary entries.
- Standard travel times displayed as separate entities, but still connected to the diary entries.
- Standard cancellation reasons for work orders, to promote data consistency.
- Contract statutory holidays, for accurate engineer availability.
- Mouse-over information, including site name and building code, against diary entries.
- Skills Expiry Report, detailing expiring skills against resources.
Asset Management and Planned Maintenance

Asset Management

Concept Evolution provides a comprehensive asset register for recording the details of user defined assets, whether fixed or portable. A multi-tiered hierarchical structure enables grouping and reporting at many levels for trend and statistical analysis of asset data. All task types can be linked to an asset to ensure a complete life cycle history is captured. This enables the identification of potential “problems” and highlights the total cost of ownership per asset or asset group.

Effective asset management plans for eventualities which can be relied on and that will affect the future of the asset. Any future changes can also be factored.

Steps therefore need to be taken to ensure that information is available about what will happen when an asset breaks, including spares availability, so that it can be back working in the shortest possible time. Information is also required about whether the asset is meeting current demand or to project future demand and the plans to address these. Concept Evolution provides functionality to address each of these issues via its Asset Register and task management features.

Assets within Concept Evolution can be categorised on the system into particular groups, allowing the establishment of a formal working relationship between assets entered into the system. This categorisation of asset falls into a number of levels, being Asset System, Asset Tag, Asset Type and Asset Name. Additionally, the Asset Associations function allows the definition of components and sub asset for particular building systems. Once defined such asset structures provides a method of easily extracting comparative reports against the asset life-cycle.

Financial data against each asset can be recorded so that Concept Evolution automatically calculates straight-line and reducing-balance depreciation figures, providing the facility to forecast replacement against user defined disposal values. Condition monitoring functionality provides the ability to track asset quality to complement a traditional cyclical maintenance regime.

Calculating the amount of depreciation to write off against a fixed asset each year is a matter of finding a model that reflects the reality of the asset’s life cycle with a business and using this model consistently. Concept Evolution allows within the asset register the use of the straight-line method or the reducing balance method of asset depreciation. Other algorithms can be used within business specific reporting models.
Asset Management and Planned Maintenance

The purchase cost of an asset and its future disposal value can be held and from this information the current value of the asset according to its total depreciation is calculated.

Additionally, conditional monitoring and risk assessment details can be recorded and used to assign an overall priority or level of importance to the asset. Factors include the importance of the asset based on operation, environment, health & safety, condition status, lease commitments and the location of the asset in a building.

Such information aids decisions and influences the level of attention or urgency that should be applied to any task requests related to the asset. It also can be used to aid decisions relating to repair, refurbishment and replacement strategies.

As tasks are raised against assets and processed through the Concept Evolution system, time and material data is automatically linked to asset life-cycle. This includes reactive, breakdown, cyclical and other works tasks, such as planned refurbishment projects.

Standard system or business specific reports provide information to allow informed decisions to be made for capital planning purposes. Other asset related reports include MTBF (Mean Time Between Failure) analysis and comparison of failure rates and maintenance costs for asset types across different buildings and from disparate manufacturers.

Documents, such as Operations and Maintenance (O&M) Manuals or CAD drawings can be associated with assets for reference purposes.

Planned Maintenance

Concept Evolution includes a cyclical task register for recording frequency based and scheduled task types for hard and soft services. All tasks can be defaulted to user defined shift patterns and/or allocated to default or specific days. Tasks can be set up to re-occur based on the specified service interval, or on an ad-hoc basis. Seasonal variations can be taken into account by specifying relevant service months. Planned tasks can be designated as “fixed” or “shiftable”.

The frequencies for “shiftable” calendar tasks are automatically adjusted based on the “actual” last service date or last breakdown date.

Instruction sets or method statements, including health and safety notes, can be set up and the relevant set can be associated with numerous planned tasks, ensuring uniformity of process throughout. FSI also provides integration with the Heating and Ventilation Contractors Association (HVCA) Service and Facilities Group (SFG) standards for maintenance. Once a subscription to the SFG20 standard has been purchased from HVCA, FSI’s Professional Services team can integrate the standard instructions within Concept Evolution™ for definition against assets and their cyclical tasks.

Concept Evolution includes a visual PPM Planner that allows maintenance schedules to be viewed in advance and expected workload balanced against resource availability. Individual tasks can be easily re-scheduled using drag and drop functionality, and entire maintenance schedules for individual assets can be adjusted.

Planned tasks can be grouped into “families” to ensure that cyclical tasks with a lower frequency (i.e. yearly) can suppress those with a higher frequency (i.e. monthly) where these occur on the same week, thus ensuring the number of tasks issued is reduced.
Service Level Agreement Management

Each task, whether reactive or cyclical, has an associated Service Level Agreement (SLA) that displays the estimated completion time against which task progress can be monitored. A five-colour traffic light system can be defined by each user to represent time left until estimated completion time. This ensures that overdue jobs or jobs about to breach will be easily identifiable to the user. This existing service delivery and control functionality can be further enhanced through the introduction of the advanced SLA module, available with Concept Evolution Plus.

Base SLA configuration allows definition of a matrix of sites, buildings, priorities, ‘contract’ and ‘contract groups’.

The advanced SLA engine provides further configuration to assist in meeting specific contract requirements. Multiple time points can be defined, monitored and escalated against comprehensive user-defined business rules for each task.

Central to SLA is the matrix, which provides an interface to map contractual criteria against Concept Evolution data entities.

Using this framework, the SLA engine can react and support the management of the contract on a real time basis.

Automatic procedures can be defined, based upon required business rules, and associated to tasks. These procedures, including how and when they are initiated, negate the necessity for manual processes being required to escalate a helpdesk call from a low level priority to a high level priority.

Via Workflow Lite/Workflow Pro, SLA can interact with e-mail, reports and the Concept Evolution database in order to help maximise efficiency and enhanced service delivery.

Features of the advanced SLA module include:

- Available with Concept Evolution Plus.
- User-definable escalation procedures.
- Definable business rules against key entities including:
  - Assets (including systems and tags).
  - Contract groups and contracts.
  - Cost centres/cost codes.
  - Date, day and time of day criteria (including working and non-working hours).
  - Departments.
  - Instruction sets.
  - Levels of completion.
  - Locations (including sites, buildings and locations).
  - Suppliers.
  - Task based criteria (including categories, disciplines and priorities).
- Real-time performance cache.
- Automated performance failure monitoring.
- Measurement of five time-critical points for every task lifecycle.
Hazards and Warnings and Multi Time Zone

**Hazards and Warnings:** Select a task, open an asset record, review contact details or building data - if one or more hazards or warnings have been defined against the particular data records the Concept Evolution user will be presented with a clear visual warning that hazards are associated to the record. Each of the sub-elements of data against which warnings have been registered are highlighted with small hazard icons.

The user is then able to drill into the details of the hazards and warnings through a sub-navigation link within the window.

Through the system preferences Concept Evolution allows the definition of hazards and warnings against any data entity. Once “allow hazards” has been configured against a particular data entity type i.e. the data tables for buildings, locations, contacts, assets, tasks etc. the user can define the types of hazards to be tracked.

On allocation against a building, location or asset record, any existing tasks linked to the record can inherit the hazard warning and all new task records linked to the record will automatically have the warning associated against them.

Each hazard type can be allocated a status (presumed, confirmed or removed) together with occurrence (how likely the hazard is to occur) and severity weightings – based on which Concept Evolution will automatically calculate a Risk and Grade for the hazard.

**Typical uses for hazards and warnings include:**

- Asbestos – presence and type…
- Asset criticality – it turned off the effect is...
- Asset ownership – refer to “x” before maintenance....
- Building / Location – flag the importance of....
- Client – preferred engineer is......
- Contacts – this client is vulnerable...
- COSHH warning – about stores items
- Health & Safety – confined space
- Personnel availability – resource is not available after 16:00....
- Task – involves high voltage equipment

**Multi Time Zone:** Provides a centralised Concept Evolution system for users who span multiple countries and time zones. Using UTC (Universal Coordinated Time) as a base, local date/times are calculated, taking daylight saving rules into account.

The powerful rules engine in MTZ uses ultimate logic for the setting of time zones: Users do not have to populate the system with regards to which time zone they are in, but instead, MTZ factors this in for them. As a result, a single instance of Concept Evolution can be used across an entire portfolio, worldwide.

Set-up pages enable Users to define which time zones are required, providing the ability to attach them to the following entities:

- Database
- Building
- User Account
- Resource
- Task
- PPM

**Features of MTZ include:**

- Automatic clock/date/time adjustments for daylight saving.
- Seamless calculation of date/time across multiple time zones.
- User controlled definition of time zones in conjunction with Windows standards.
- Ability to set time zone visibility.
- Compatible with the Service Level Agreement (SLA) module.
- Personalisation of grids to display the same date/time in different time zones, via Concept Grids.
- Seamless integration and simple upgrade path from existing single time zone systems.
Concept Connect and Concept Reach
Self Service Portals

**Concept Connect**: Allows you to extend, via a light web portal, access to Concept Evolution to your sub-contractors and anyone else that does not require full system capability. Moving the day-to-day work to your contractors, including grids, search facilities and the assigning of resources etc., will allow them to complete their own tasks.

By providing a tailored version of Concept Evolution via Concept Connect, contractors have instant access to information relevant to their contract, including Purchase Orders, Quotes, Task Management and Reports.

Optional Operation functions include:
- Task control
- Task allocation and fast sign off
- Time sheets
- Purchase order requisitions
- Support for Digital Dashboard

Operational pages for Concept Connect, with constraints added where appropriate, include:

**Task Control Management**: Extends the Task Control Module within Concept Evolution onto the intranet, allowing users to view Task details from anywhere in the company with internet or intranet access. From within the set-up preferences of the main Concept Evolution™ system, the user can be automatically restricted to view only particular task types, and each user can set up their individual preferences for the content of their task control display and their filter boxes, thus ensuring only relevant information is visible.

**Fast Sign Off**: Allows intranet / internet users to complete and feedback into the main Concept Evolution system all details of a given task. Fast Sign Off can either be operated independently, or integrated with Task Control Management. To ensure security of data, the user can be restricted to viewing certain task types or tasks from one or more resources, thus making possible for an engineer to sign off only their own tasks.

Features of Concept Connect include:
- Partitioning of Concept Evolution, providing a scaled-down view of the Concept Evolution data specific to your needs.
- View and manage your own tasks, Purchase Orders, Quotes and Reports only.
- Set a certain level of completion against tasks.
- See certain events logged against tasks.
- Optional operation functions.

**Concept Reach**: Provides a light, web-based front-end application to compliment the wider use of the Concept Evolution completely web-based CAFM solution. This can be achieved through your existing corporate intranet or extranet, utilising the same data set. For users who do not have access to the core Concept Evolution system, Concept Reach allows them to interact with the same information.

Full security is maintained by data segregation and integration with Concept Contract Views. Logon, password identification and other measures ensure that only permitted users have access to data. Time-specific events can be set, including important maintenance work, which will then disappear from the system once the timeframe has passed. Access can also be set based on the regions managed by end-users. The set of management tools included provide users with full management of Concept Reach.

Concept Reach is a widget-based product, allowing users to fully customise their page layout and style using a drag-and-drop system. Users can display as few or as many of the widgets as they so choose, and extra widgets can easily be added to ensure users have a fully bespoke intranet system and user experience. Users can take external widgets or feeds (ie BBC News etc) and drop them into their Concept Reach system.

Widgets available with Concept Reach include:
- Helpdesk: for call-logging
- Task Grid
- RSS feeds
- HTML feed
- Document management
- Visitor management
- Concept Reports
- Crystal Reports

Features of Concept Reach include:
- Simplified user interface, to minimise the requirement for end-user training.
- Expand the use of Concept Evolution beyond the core Facilities Management team to increase visibility, by allowing access to Concept Evolution from any intranet/internet enabled workstation and recommended tablet device including the Apple iPad, within your organisation.
- Publication and distribution of reports from within core application (3rd party licences are required for Crystal Reports).
- Style sheets, for corporatisation of the user experience.
- Supports multi-languages from within the same deployment.
- Availability of security models to control user access to permitted functionality and data.
- Control of set-up from within the core application.

Concept Reach provides a light, web-based front-end application to compliment the wider use of the Concept Evolution completely web-based CAFM solution.
Concept Evolution Management Reporting

Concept Evolution provides the capability to generate a report from every grid. This means that the user can filter within the grid control and produce multiple report variations and output the detail to hard copy or CSV (Microsoft Excel). In addition, approximately 100 standard report definitions are provided that enable the user to select from a variety of relevant parameters. In many cases a single report definition can produce multiple output variations. Reports can be exported to Excel, Rich Text, Export to Text and Export to TIFF.

In addition, the open architecture of the Concept Evolution database allows third party ODBC (Open Database Connectivity) compliant reporting tools such as Crystal Reports to be used for client specific report production (see diagram below). Existing Concept data can therefore be retrieved in almost any reporting format required.

Concept Reports

Concept Reports is the engine that provides the basis of system report generation without the need for third-party reporting tools or viewers. Depending on deployment methodologies and access rights, users can either import and export reports defined by FSI or internal Concept champions, or generate new report definitions.

Users can create simple reports, but also have the option to produce complex or specialised reports using comprehensive tools such as formulae and sub-reports. Concept Reports is designed to work with the Concept Evolution database to help with the analysis and interpretation of Concept data.

Within the designer the look and feel of reports can be changed, including fonts, colours, data layout and output format. Such additional features include adding images, headers and footers, and title information.

When used in conjunction with the Concept Workflow suite a user can schedule the automatic execution and attachment of a report for email distribution, in Adobe PDF format, to individuals or groups. This means that management information can be circulated on a recurring basis without the need for user intervention, for example on Friday at 5pm weekly performance statistics can be emailed to the supervisory team for a particular region, and an overall portfolio analysis distributed to the executive team.

FSI (FM Solutions) Limited Reporting Expertise

Our Professional Services team has extensive experience in the production of management and performance reports. We can provide assistance in the production of tailored reports at operational, tactical and strategic levels.

Our expertise includes:

- Definition of customised or bespoke reports that can be executed from within Concept Evolution
- Compilation of comprehensive management information from disparate applications
- End-user training in the use of Concept Reports and Crystal Reports
- Technical assistance and mentoring in relation to the use and interpretation of the Concept Evolution database schema
- The secure support area of our website includes a download area which provides access to client users with a support account to:
  - Approximately 30 database views to assist end users to easily define common report output
  - Example Concept Reports and Crystal Reports which can be used as the basis of organisation specific reports
Concept Evolution Management Reporting

Crystal Connect

Crystal Connect from FSI enables dynamic interaction of Crystal Reports®, a professional reporting tool for the presentation and design of comprehensive operational and management information, with Concept Evolution data. Crystal Connect allows for the distribution of these Crystal Reports® without the need for further or additional Crystal Reports® licences.

Whilst a knowledge of the Concept Evolution database tables is required to create reports, general Concept Evolution users can select from pre-defined parameters, using ‘friendly names’ for given data fields.

Users can also import and export information, to develop the report in Crystal Reports® and import the definition into Concept Evolution.

Reports can be updated in a controlled manner, thanks to version control, and can be published on the web via FSI’s optional Concept SSP solution (requires additional 3rd party Crystal Reports® licences, from Business Objects).

Benefits:

- Royalty-free access to professional quality reports.
- Friendly field names: easy to use for all user levels.

Users of SAAS include:

- Organisations managing their own assets and FM services, but who want to reduce capital expenditure or lack the internal IT resources / knowledge to support vital business systems.
- Maintenance contractors or FM service providers dealing with the costs and complexities of mobilising contracts and require full maintenance / FM service management capability.

Benefits:

- Reduced IT and Operating costs, as there is no need to purchase server hardware / server software for the running of Concept Evolution.
- Secure environment for Concept Evolution and protection of company data.
- Global accessibility: available over the web directly to your computer.
- Concept Evolution upgrades conducted seamlessly and with no interruption to end users.
- A range of payment structures to suit your budget.

Software as a Service (SAAS)

SAAS is a software distribution model allowing you to fully utilise Concept Evolution without disruption to day-to-day operations, whilst maintaining control of FM costs. Concept Evolution is hosted by a global Application Service Provider in a secure environment, published and available over the web directly to your computer, regardless of location.

SAAS removes the need to install and run Concept Evolution on your network, therefore removing software maintenance, ongoing operation and support resources, and the need for capital investment in server hardware. SAAS provides a simple pay-as-you-go solution offering a cost effective delivery of Concept Evolution.

Features include:

- Available with Concept Evolution.
- Mark reports for private use, or add them to public areas.
- Import and export system reports.
- No run-time licence for Crystal Reports® required.
- Supports Crystal Reports® Version 10.5 and above.
- Ability to use parameters within Concept Evolution:
  - filter the report output before running with date ranges.
- Ability to export reports.

SAAS is a software distribution model allowing you to fully utilise Concept Evolution without disruption to day-to-day operations, whilst maintaining control of FM costs.
In addition to the base functionality and modules outlined in the preceding sections of this document, the following optional modules are also available for Concept Evolution:

**CAD Connect**

CAD Connect is a desktop application which is installed alongside AutoDesk®, AutoCAD® or AutoDesk Architectural Desktop® and which provides the tools and information to manage space and infrastructure costs effectively.

Integrated to the Concept Evolution database, CAD Connect allows an understanding of the space usage patterns and requirements for each part of an organisation. It provides information to allow for cost reductions through rationalisation of redundant space. The data inherent within the space allocation functions of CAD Connect enables auditable charge back to be implemented quickly and with confidence.

Features of CAD Connect include:

- Linking Concept Evolution™ assets, space and personnel, to AutoCAD® objects, providing both graphical and traditional reporting techniques.
- Real-time and bidirectional synchronisation of data between Concept Evolution and AutoCAD®.
- Dynamic visualisation of space usage.
- Optimisation of space planning, by providing accurate stacking diagrams together with the consumption of space.
- Ability to assist with the development of occupancy plans.

**Digital Dashboard**

Digital Dashboard provides a real-time, easy to understand graphical representation of Key Performance Indicators (KPIs) defined and tailored according to individual requirements.

Data may be drawn from Concept data sources and through integration with third-party systems. Users are provided with access to relevant metrics and performance output thus providing the ability to measure performance and key business metrics at a glance. Management information can therefore be provided at operational, tactical and strategic levels and includes drill down capability between KPIs and Concept Reports. Digital Dashboard can reduce administration time by allowing organisations to produce and deploy data driven dashboards and KPIs to a precise audience. These dashboards can be further customised by individuals, to display information most relevant to their role. Users are able to respond quickly to potential problems or opportunities, and to accomplish specific facilities and infrastructure management goals, thanks to having real-time information at a glance.

Digital Dashboard is delivered with an initial suite of more than 40 industry standard KPIs, and allows the user to select those most relevant to their organisation. Additional KPIs can be defined and deployed to relevant individuals or groups.

Standard KPIs include:

- Number of incomplete/outstanding/open helpdesk calls.
- Top ten assets with highest failure rates.
- Failure analysis KPIs, including mean time between failures and mean time between repairs.
- % of compliance with Service Level Agreements (SLAs) by contract.
- Room and space utilisation.
- Actual Vs committed purchase order spend.
- Trend Vs current for tasks logged per day.
- Average time to resolve calls by discipline.

**Facilities Booking**

The Concept Evolution Facilities Booking System provides a flexible set of tools and options to simplify the administration and optimisation of shared resources throughout a property portfolio. From meeting, conference room and hot desk booking through to reservation of training facilities, parking spaces, and pool cars; the Facilities Booking System combines a rich feature set with ease of use and includes functionality to manage bookings, catering and inventory requirements, and if required can manage visitor registration, reception and internal/external charging for space, catering and resources.

Functionality within the Resource Booking System helps to maximise the utilisation of shared resources and prevents duplicate bookings. It assists in the reduction of the administrative workload on the FM team and ensures that the correct services and equipment are in the right place at the right time; thereby providing a more efficient service to end users. Bookings may be entered and organised in a number of ways and available time slots can be easily identified, reserved and allocated simply using a mouse or keyboard.

The Recurring Booking function provides the user with suggested rooms and available dates based on a variety of criteria; thus ensuring maximum use can be made of all facilities.

Features of the Facilities Booking System include:

- Available as a standalone application or as a module with Concept Evolution Lite, Evolution and Evolution Plus.
- Individual and recurring bookings.
- Booking and management of catering delivery.
- Reservation of inventory and equipment requirements.
- Recording attendee information.
- Internal and external charging of bookings and payments.
Concept Evolution Modules

Other instant updates from Concept Evolution to the Engineer, removing the need to carry reference materials, include:

- Supplier information.
- Delivery points.
- Sites, buildings and locations.
- Instruction sets.
- Health & Safety information.

Sensitive data stored on the mobile device is protected from unauthorised access through user account and password combinations. Synchronised data is also encrypted and compressed when an update is actioned by the Engineer or an update is made via the core Concept Evolution system.

A Mobile Data Solution offers the following:

- Two-way communication between back office and field engineers.
- Seamless data transfer between the Concept database and mobile device.
- Reduction in administration and paperwork.
- Data protection on a user basis, through user account and password combinations.

Import Utility

The Import Utility allows for data to be imported into Concept Evolution through a custom Microsoft Excel© plugin*.

Key components include:

- Create new import templates using data requirements (compulsory fields etc) set up in your Concept Evolution system.
- Validate data entered on the template in Microsoft Excel© with one click.
- Validation errors highlighted in spreadsheet to allow for correction.
- Import validated data directly into Concept Evolution.
- Save and open spreadsheets as Concept Evolution documents.
- History of data imports stored in Concept Evolution with access to the original spreadsheets.
- Ability to update and re-import existing as well as new data.

Import spreadsheets can be stored as documents using the Document Repository system in Concept Evolution. Via the Open Template button, these stored documents can be opened from a repository and used as templates whenever required.

*Microsoft Excel 2010 and 2013 are supported. An installer (MSI) is required for the Excel plugin.

ISM

The Integrated Services Module (ISM) for Concept Evolution not only provides existing functionality available within the Integrated Services Helpdesk / Soft Services Helpdesk or Porterage module, but also enhances the user experience.

Focus is very often on high volumes of tasks with short SLA response and rectification times, therefore usability is key. With that in mind, ISM include a Rapid Entry Helpdesk for speedy data entry, and a Resource Management screen enabling the quick assignment of tasks to available resources via drag-and-drop.

Task Scheduling is available with ISM, to accommodate portering tasks as well as any non-Hard FM tasks including cleaning and security. Users are able to create Scheduled Tasks, by minute, hour, day, for security rounds and cleaning schedules etc.

Features of ISM include:

- Helpdesk tasks can now have additional fields for Soft Services, including “to” and “from” for location, as opposed to just a single location.
- The Return Route Task generates a new task based on an existing one, but with the “to” and “from” locations swapped.
- New grid to manage radios and assign them to resources.
- New SLA times panel providing instant visual feedback on progress towards calculated SLA deadlines.
- New ISM Task Grid for assigning tasks to resources by drag-and-drop.
- New ISM Resource Grid for monitoring and controlling which resources are on and off duty.
- New Scheduled Task functionality allows for the creation of repeating tasks based on a template.
**Concept Evolution Modules**

**Live View**

Live View is a graphical display of Task, Booking, Asset and Stock data in relation to locations. As a natural extension of Concept's Visual Booking interactive room and hot desk module, it also taps into the popularity of the dashboard interface. These tools provide a powerful graphical representation of the headline data and allow users to drill down to the information that enables them to make fast, accurate decisions.

Live View can be accessed easily from multiple points - a display screen in the Help Desk call centre, for example, or the organisation's home page. With its rich toolkit, it can be customised to suit the needs of FM providers, contractors and clients.

Maximum and minimum values can be easily applied to tasks, based on KPIs. So while many users will like the de facto setting of floor plans, the module can also be configured schematically, with the data being mapped to diagrams - giving an overview of all meeting rooms across different offices, for example, or a portfolio of contracts that cover a large geographical area.

Live View uses numerical values and colour codes, that can be configured to act like traffic lights, showing hot spots or areas of potential concern. By displaying maximum, minimum and average values, the module can identify anything from over-subscribed or under-used rooms, to imminent SLA breaches or potential overlaps between Help Desk tasks and an infinite range of costs, quantities and priorities related to specific tasks, assets and stock.

**PFI/PPP Payment Mechanism System**

FSI have proven experience in providing PFI payment mechanism solutions across diverse business sectors including hospitals, schools, prison services and government departments.

Our experienced PMS ("Payment Mechanism System") consultants understand the complexities involved and our services incorporate all facets of PFI/Performance Management reporting including:

- Monitoring contractual performance.
- Calculating performance and unavailability points and deductions.
- Computing volume and energy adjustments.
- Providing early warning systems to flag when deductions are due to kick in and monitoring repeat rectification.
- Calculating the month end invoice.

The first step of a PMS implementation is to review the contractual documentation and scope requirements with the client.

Typically we will require the relevant schedules detailing the Payment Mechanism calculations, the Service Level specifications, locational data sheets and calculation test scenarios.

Following the review of client requirements, a PMS specification is produced detailing the calculations and how they will be incorporated within Concept Evolution, including system design and reporting requirements. Functionality is tested against a configured prototype Concept Evolution system.

A typical PMS implementation uses standard templates which are customised to provide user-specific utility.

The utility performs PMS runs, which populate database tables with PMS calculations in accordance with contractual documentation.

The utility is protected using Concept Evolution security to prevent unauthorised access. It contains key PMS set up data including:

- Contractual periods and annual service values.
- PMS specific locational information driven by Concept’s standard locational configuration but including opening hours, weightings and functional area and unit allocations.
- Service weightings.
- Deduction thresholds and points.
- Volume Adjustment values.

Concept’s SLA module is configured to automatically calculate response and rectification times and to monitor failures.

Service Level Specification are configured as Concept Evolution instruction sets with their relevant SLS number for easy reference.

PMS reports are written by FSI using Crystal Reports, in line with contractual documentation and agreed report requirements, using the data stored in the PMS database tables. Once the specification has been agreed with the customer, development of the PMS utility by our specialised programming team commences.

The PMS utility development plan incorporates key stage reviews with the client to ensure the development is on track and to provide the opportunity to test functionality.

Concept Evolution configuration and PMS report generation takes place during the development stage in readiness for client testing. Given the intricacy of the calculations, exhaustive testing is required and carried out in conjunction with the client for final sign off.

The end result is a fully fledged performance and Payment Mechanism System providing contractual monitoring and reports allowing our customer to concentrate on the provision of services to the highest standard.
Concept Evolution Modules

Projects Module
The projects module for Concept Evolution caters for the management and recording of projects. Functionality includes cost control, cost recharging, task scheduling, authorisation, move management and management of associated risks relating to the task(s) at hand.

Projects can be displayed via an interactive Gantt Chart, in order to illustrate the project schedule including start and finish dates of the project components, as well as a summary of the project itself. Individual task timelines can be viewed from within the chart and you can drilldown to the selected tasks’ details.

Features of the Projects module include:
- Project Task: track the estimated and actual internal and external labour costs of a project, as well as non-labour costs including equipment, materials, suppliers and travel expenses.
- Apportioning of project costs to user defined elements within an organisation, ie the sharing of costs for communal work spaces etc.
- Flexible authorisation model to ensure projects are authorised by the correct personnel.
- Task dependencies, to show relationships between two tasks in which the commencement of one task is dependant on the start or finish of another task.
- Organisation or projects into categories based on work type, ie DDA (Disability Discrimination Act), Health & Safety, Networking etc.
- Ability to export projects to Microsoft® Project.

Property & Estates Module
The Property & Estates module offers property managers, owners and tenants a solution to manage their property portfolios.

Fully integrated with Concept Evolution, Property & Estates provides a comprehensive range of property related data.

By monitoring elements that may have an impact on property portfolios, as well as dealing with review and expiry dates, a summary of potential revenue and performance can be produced. Statutory requirements, lease notifications and landlord/tenant responsibilities can be tracked.

Property & Estates allows for comparisons of property and lease information across multiple buildings.

Features of Property & Estates include:
- Complete management and tracking of property portfolios.
- Flexible analysis of property related data.
- Tracking of potential revenue and performance.
- Registers of properties, rents, rates and leases for accurate tracking.
- Comparisons of property and lease information across multiple buildings.
- Ability to plan for the future of property portfolios via rent reviews etc.
- Generation of automated reminders via Concept Workflow.

Features of Building Utilities include:
- Record specific details associated with a utility for a particular location, i.e. cost against consumption.
- Record all billable utilities for a portfolio. These can include gas, electricity, water, etc.
- Record daily consumption of a utility within a building. Allows the cost of multiple utilities to be monitored, either over a single month or a user defined date range.

Purchase Order Module
Fully integrated with other components of Concept Evolution, the Purchase Order module simplifies processes associated with order management, including everyday accounting operations. The module can be used to manage several order types including purchase orders and contract related orders.

The Purchase Order module links with the task, supplier and contract features of Concept Evolution, as well as the Stores module, allowing simple navigation to stores and inventory items for reordering.

When combined with the Facilities Booking module, purchase orders may be generated for specific bookings. Purchase order request, authorisation and search functionality can be extended through the Concept Evolution Self-Service portal.

Features of the Order module include:
- Automatic system generated, user defined or supplier specific order number options.
- Multi tier user authorisation limits.
- Blanket orders against given suppliers.
- Goods receipt functions, including partial delivery.
- Audit trails.
- Payment allocation, including part payment.
- Multiple invoices for orders.
- Split and link purchase orders.
- Multiple delivery points.
- Linking purchase orders to tasks raised on the Helpdesk.
- Line item discounts and multiple VAT rates.

Fully integrated with other components of Concept Evolution, the Purchase Order module simplifies processes associated with order management, including everyday accounting operations.
Concept Evolution Modules

- Customisable purchase order layouts.
- Ability to automatically issue purchase orders via the Workflow module.

Quotes Module
The Quotes module provides the tools needed to request quotations for the supply of goods, materials and services. It reduces the amount of time spent raising and managing quotations through traditional manual methods and provides instant access to supplier and pricing information.

Fully integrated with other components of Concept Evolution, the Quotes module simplifies processes associated with quotation management, including receiving requests from a client through to the issuing of quote requests to multiple suppliers, and the final acceptance of a selected quote.

The Quotes module links with the task, supplier, contact, and contract features of Concept Evolution, allowing simple navigation to relevant information for quote generation and management.

Features of the Quotes module include:
- Automatic system generated quotation references.
- Links to contract, supplier, and task records.
- Manage quote requests from clients and to suppliers.
- Request, issue, reject, and approve quotes.
- Place quotes on hold for future processing.
- Customisable quotation layouts.
- Ability to automatically issue quotations via the Workflow module.

Sales Invoicing Modules
The Sales Invoicing Module for Concept Evolution manages the invoicing of scheduled tasks (fixed and variable amounts), reactive tasks, facilities bookings and projects-based tasks throughout the period of a contract. Any charges raised automatically comply with rules defined against contracts in line with agreed client-pricing policies, and invoicing rates can be setup accordingly.

Invoice layouts can be defined and produced specifically for each contract, including labour, materials, expenses and other chargeable elements. Alternatively, automated transfer of invoice details can be provided for upload into finance and accounting systems.

The powerful ‘Rules Engine’ in Invoicing allows users to setup the invoicing method most suitable to their organisation, including entities and values (contract, location, building etc).

A number of simple rules are included:
- tasks to be invoiced at cost.
- tasks to be invoiced at cost+.
- tasks to be invoiced based on a schedule of rates.
- contracts to be invoiced on a schedule basis.
- facilities bookings to be invoiced at cost.
- facilities bookings to be invoiced at cost+.

Invoices can be created directly from the entity you wish to invoice, for example:
- Tasks can be invoiced from the Advanced Helpdesk.
- Bookings can be invoiced from Booking Details.
- Purchase Orders can be invoiced from Purchase Order Details.
- Projects can be invoiced from Project Details.

Features of the Sales Invoicing Module include:
- Define a Master Schedule of Rates as the template for any schedule of rates created for/applied to each Contract
  - Invoicing Rates include:
    - Schedule of Rates.
    - Actual Cost of tasks based on labour values per task.
    - Actual Cost+.
    - Discipline Rates.
    - Contract Value.
- Copy rules from one contract to another, to allow templates for invoicing to be setup and copied.
- Cost Centre based and Contracts based invoice generation.
- Periodic and task-specific invoicing.
- Authorisation thresholds.
Concept Evolution Modules

Stores Module

The Stores module offers a comprehensive range of functions for stock control and management. As well as the basic operations of recording purchased stock and allocating it to multiple stores locations, the stock register makes provision for details such as manufacturer part numbers, bin locations, bar codes, unit prices and quantities for reordering.

This module is suitable for organisations of any size, with the potential for unlimited stock locations, including van stock. Security is provided by controlling user access to any location, enhanced further by create/update controls for any area of the module.

Functionality includes industry standard pricing models (average pricing, FIFO and standard unit pricing), user-definable stock groups, classes and charges. Stores is seamlessly integrated with other areas of Concept Evolution and other modules such as Purchase Orders, allowing for ease of reordering. In addition, a standard feature of the module is the use of barcode readers to manage stock and stocktaking.

Features of Stores include:
- Multiple stores for the same item.
- Preferred suppliers.
- Stock adjustments.
- Stores valuation.
- Full or random stocktaking.
- Audit trail.
- Management Reports.
- Stores issues.
- Association of stores with maintenance activities.
- Allocation of stock to planned preventative maintenance.

Visitor Management

Visitor management allows for the registration and reception of visitors throughout the portfolio. A visitor can be registered either as part of a booking actioned via the Facilities Booking System, or via the Concept Evolution Self-Service portal.

Features of Visitor Management include:
- Printing visitor badges.
- Register of visitors.
- Visitor status: expected, with host, departed etc.
- Monitoring of visitor location.

Visual Booking

Visual Booking for Concept Evolution is a quick and easy way to search and book any available resources in a visual layout via interactive maps and ‘zones’.

Static images including regional maps, building floor plans, schematics or photographs of buildings or locations can be uploaded and be overlaid with shapes that represent one or many zones.

The zones can either represent a bookable facility such as a desk or can be drilled down into another zone. This allows for a flexible zone hierarchy that can map company structure or geographical regions without being restricted to site, building and location.

The screens provide a visual representation of each space, allowing users to easily and instantly view available resources.

Availability is shown on maps in green, space booked by the logged in user is shown on maps in blue, and space booked by other users is shown on maps in red. Hovering over bookings shows the contact for that booking. Flexible multi-day booking functionality and booking on behalf of other users is also available.

Via the Visual Booking widget, users can select shapes on the map to book a location, as well as to search a location for a given Date and Time via filters. Via the Check-in widget, a list of bookings for the day can be displayed and functionality includes the ability to check-in to those bookings.

Via the Check-in widget, a list of bookings for the day can be displayed and functionality includes the ability to check-in to those bookings.

Once a booking has been made, Workflow can be used to automate confirmation emails to the booking contact and to automate release of un-checked-in bookings.

Features of Visual Booking include:
- Search and book any available resources in a visual layout via interactive maps and zones.
- Ability to upload company floor plans for making bookings.
- Easily identifiable colour scheme for booked and bookable resources.
- Flexible multi-day booking.
- Booking on behalf of other users.
- Confirmation emails can be achieved with Workflow.
- Check-in: for users to check-in to their bookings on arrival.
Concept Evolution Modules

Workflow Lite

Whilst many software systems are capable of issuing automated messages via email or electronic facsimile, the rules that govern such functionality are often rigid and the content definition limited. By contrast via Workflow Lite, Concept Evolution offers complete control over the business rules that trigger system communications and the content of messages.

Workflow Lite enables the automation of email, electronic facsimile and SMS text messaging using an intuitive graphical design interface to map the business rules which trigger messages. Dynamic content can be defined for each message, including plain text or HTML formatting and PDF report attachments.

Features of Workflow Lite include:

■ Flowchart designer.
■ Plain text emails.
■ HTML emails.
■ Electronic facsimile (requires third party fax gateway).
■ SMS text messages (requires an Internet Connection and FSI FAST SMS text service).
■ Automated PDF format report distribution.

Workflow Lite is commonly used for:

■ Acknowledgement of task request details to customer.
■ Updating customers with details of task lifecycle events.
■ Escalation.
■ Notification to facilities staff of alerts and failures.
■ Informing catering contractors of catering requirements automatically.
■ Sending purchase orders via email.
■ Sending work orders via email or SMS.
■ Alerting building users to forthcoming planned maintenance.
■ Report distribution.

Workflow Pro Module

Building upon the functionality of Workflow Lite, Workflow Pro includes a standard set of reusable software components (nodes) which enable the automation of business processes and integration of Concept Evolution with other business systems.

Automation

Manual procedures can be fully automated via Workflow Pro to improve efficiency and drive process. The module provides a flexible automation solution and includes the ability to define deployment specific rules for complete control of facilities activities.

Automation examples include:

■ Auto assignment of resources to jobs based on task criteria.
■ Auto population of the Concept contact register on insert of helpdesk tasks.
■ Auto-completion of Concept data to reduce input time.
■ Auto job record/purchase order creation against user defined business rules.
■ Validation and completion of purchase orders from electronic invoices.
■ Automatic creation, issue and distribution of scheduled reports.
■ Automated report distribution (parameter specific reports).

Integration

Workflow Pro provides a standard integration framework for interfacing Concept Evolution with other business systems. Data exchange formats include XML (eXtensible Markup Language), CSV (Comma Separated Value) or SQL (Structured Query Language) using email, FTP or web services. Integration requirements differ for each organisation and are often subject to change. The use of Workflow Pro provides a structured yet flexible set of tools for integration projects and therefore offers many benefits over specifically written interfaces.

Integration examples include:

■ Transfer of financial data and finance code structures with systems such as SAP®, Oracle Financials®, Microsoft© Dynamics Great Plains, Sage©, JD Edwards®, Agresso© etc.
■ Active Directory and Exchange Server.
■ Real time scheduling systems i.e. OPTI-TIME.
■ Subcontractor works management systems.
■ Radio integration.
■ HR, payroll and time recording systems.
■ BMS, ICA and SCADA feeds.

Features of Workflow Pro include:

■ Database event triggers.
■ File and email event triggers.
■ Timed and scheduled event triggers.
■ Automatic import/export of data.
■ Integration with Active Directory®, Exchange Server® and other business systems.

Workflow Pro can be supplied either on a ‘locked runtime’ or unrestricted basis. Executable workflows can also be defined which may be called as part of a specific workflow process.
Mobile Solutions

FSI GO Workforce Mobility Solution

FSI GO is a software platform for Mobile Application development. Providing flexibility and agility, users can build fully customised mobile solutions, extending the functionality of both Concept Evolution and third party integrated systems.

FSI GO supports mixed environment Smart Phones and tablets, plus ‘bring your own’ device.

The FSI GO platform comes with a range of pre-designed template applications.

Mobile applications are built via the fully web-enabled Management Portal.

Core portal features include:
- Drag & Drop Application builder
- Multi-Tenant Support (SaaS)
- Database Object Builder
- Database Relationship Builder
- Application Publishing
- Mobile User Notifications
- Mapping-Geo-Notifications
- Diagnostics
- Document Publishing
- Device Management
- Security and Permissions System
- Multi-Language Support
- Remote Mobile Wipe
- Mapping – Find User / Nearest
- Tenant Data Viewer
- Device Registration
- Licencing System
- User and Role Management

Core mobile features include:
- Secure Logon / Authentication
- Multiple Application Support
- Multi-Platform
- Data Synchronisation Services
- Application Synchronisation
- GPS
- Barcode Support
- Signature Capture
- RFID / NFC Support
- Published Document Viewer
- Data Encryption
- Geo-Notifications
- Notifications
- Web Service Call Out
- Mobile Forms Runtime Engine
- Device Registration
- Off-Line Data Store
**Concept Evolution Value Add**

**FSI and BIM**

Building Information Modelling (BIM), is a process involving the generation and management of digital representations of architecture for buildings, locations and assets. Building information models gathered become a vital knowledge and resource tool to assist decision making for the complete lifecycle of buildings and facilities, from the early conception and planning stage, to the design and construction phase, through their working life, and finally to any eventual demolition phase.

FSI understands the need to be engaged in shaping the way that this technology is developing in order to optimise the benefit to the FM industry. FSI are involved in the UK in BIM steering groups and BIM forums that are helping to develop the ISO standards for the future and are actively working on a project in partnership with Autodesk and BAM. FSI can apply their expertise and consultancy skills to assist with the development of your BIM protocol and strategy.

FSI has developed an integration platform to feed BIM data directly into Concept Evolution.

Once BIM data is collected, including the structure, systems and equipment, the information is transferred into Concept Evolution. A standard set of nodes in FSI’s Workflow solution enable the automation of business processes in Concept Evolution, as well as interfacing Concept Evolution with other business systems. This immediate transfer of building information from the construction team to the Facilities Management team provides significant business efficiencies.

The BIM integration with Concept Evolution provides detailed asset information for accurate maintenance and replacement regimes, whilst the 3D modelling assists with space and move management as well as proposed modifications. Manual procedures are fully automated to improve efficiency and drive process.

**FSI and eSight Energy integration**

FSI (FM Solutions) Limited, developers of the Concept Evolution computer aided facilities management (CAFM) software product range, in partnership with eSight® Energy, a best-of-breed energy management suite, provide an integrated maintenance and energy management solution.

eSight® provides the most sophisticated and intuitive energy management and analysis techniques available worldwide. Users can manage all aspects of energylated data, and as a fully web-enabled solution, eSight® is available as both a SaaS (Software as a Service) model, or installed directly to a client site.

The Evolution Energy Module allows users to attach a utility to an asset i.e. Electricity to a SMART identified by the MPAN (Meter Point Administration Number), connected using the energy consumption data from eSight®. Once the data is in Concept Evolution, users can utilise the alarms to work as reactive tasks, display energy reports using Concept Reach and runtime management for each utility asset can be managed within Concept Evolution.

Energy analysis reports from eSight® can be displayed in the Concept Reach solution from FSI, as per below.

Reactive tasks can be raised in Concept Evolution from the Consumption Alarms within eSight® Energy. Defined parameters will be set in eSight Alarms; once exceeded, a reactive task will be triggered within Concept Evolution.

Concept Evolution can help manage the life expectancy of the utility equipment, using Workflow to poll the consumption data from eSight® supporting Runtime Meter tasks. Based on threshold parameters configured by client requirements, Workflow will create a task once thresholds are met or exceeded.

**FSI and IFS 360 integration**

Concept Evolution and FSI GO integrate with IFS 360 Scheduling for automated workforce scheduling.

IFS 360 schedules a mobile workforce effectively and profitably, returning immediate cost benefits, including, the reduction in travel costs and the improvement in dispatcher-to-engineer ratio.

At the heart of IFS 360 Scheduling is the dynamic Scheduling Engine, constantly reviewing both workload and technicians: routine decisions are made automatically by the system to ensure the correct resources are utilised to achieve optimum efficiency and maximum customer service.

Contracts in Concept Evolution can be configured as Schedulable, and once set, any tasks associated with a Contract can be set to be scheduled by the 360 Dynamic Scheduling Engine.

**Features**
- Available with the Concept Evolution base system and FSI GO.

**Benefits**
- Automatic scheduling of resources to tasks for optimum efficiency.
- Cost benefits: reduction in travel costs and improvement in dispatcher-to-engineer ratio.

Data for management includes:
- Benchmarking
- Tenant Billing
- Energy bill validation
- Meter data capture
- Data alarms
**Project Approach**

FSI has extensive experience of developing, designing and implementing Computer Aided Facilities Management (CAFM) software solutions, gained since 1990. Our unique blend of IT and experienced FM personnel equips us to provide our clients with complete project management consultancy. Our broad knowledge base and valuable experience has gained the trust of numerous blue chip clients, where we have been engaged in many high profile projects, providing advanced Facilities Management and Maintenance Service solutions.

We have a very substantial and varied client base in all areas of industry and commerce with the result that we can bring all our extensive knowledge into an FSI/Client Partnership. The word “partnership” is used deliberately to illustrate the FSI approach. We do not consider it is acceptable to merely supply a piece of software to a client and then “walk away.” In fact the opposite is the case.

We at FSI recognise the level of investment that a client must make not only in the purchase of the software package but also in the implementation and ongoing use of the package. In other words it is the goal of FSI to provide the solution. The solution as we at FSI view it, is based on long term client relationships. Being such, it encompasses all elements from initial contact through to support. FSI take great pride in our ongoing client relationships and in fact, the majority of new work comes as a result of client referral.

The first step along the path of Implementation is to understand what a client requires their CAFM systems to do, the business processes involved, and the outputs required; to this end we recommend a “scoping exercise” as the first stage of any project. Our Project Control and Systems Analysis Documentation Framework provides structure for the scoping. To achieve the objectives it is necessary to set up a management team consisting of the FSI Project Manager and interested parties including Management representatives from the client. This group will be responsible for providing the procedures and a Management Strategy for the use of Concept Systems and any other applications together with an implementation, training and development programme. The diagram below summarises the elements of a typical Concept implementation.

It is worth noting two points before finalising the evaluation process. The first point is the use of a simple theory i.e. the benefits theory, more commonly known as “what’s in it for me?” In our experience the best implementation takes place when the users at all levels from the operative to the manager can readily identify the benefits of using a CAFM system. If this can be achieved then success is guaranteed. The second point is common to IT systems; it is the “2 Cs, Confidence and Competence”. The confident user is the competent user and as a result the whole implementation is of a positive nature.

### Support
- **End user training**, final documentation, support and follow-up training.

### Assess
- **Assess opportunities of improvement**, get commitment, create awareness.

### Plan
- **Define goals, purpose and requirements**.

### Analysis
- **Detail requirements and preliminary project plan**.

### Develop
- **Coding, integration, build, testing and documentation**.

### Design
- **Convert functional requirements into project specifications. Build data and process models. Develop preliminary standards, revise project plan and acceptance criteria**.

### Deploy
- **Install, configure, integrate with legacy data and add new data. User and administration training, preliminary documentation**.

### Pilot
- **Build prototype and demonstrate benefits to stakeholders**.

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**About Us Implementation Process**

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- **Pilot**: Build prototype and demonstrate benefits to stakeholders.
Project Management

Project Management can be best summarised in identifying two component parts, the FSI part (internal) and the Client part (external).

Dealing firstly with the FSI part, the major issue is to ensure continuity of knowledge and response as the project flows through the company. For example, the initial contact with a client starts with business development, if an appropriate solution is identified and agreed upon, implementation takes over. Toward the end of the implementation period the role of support is realised and the support engineers become the main point of contact for a client.

Perhaps the single most important element in this process is the collation of necessary information which needs to be available to all concerned from the start of the project to the finish. To achieve this FSI have invested heavily in customer relationship management (CRM) tools to facilitate a careful yet fluid process of interaction between FSI personnel in ensuring project continuity for the client. The FSI Project Manager appointed on behalf of the client is responsible for overseeing both the implementation and ensuring the effective management of information throughout the company and will remain the primary point of contact for the duration of the project.

The second part of the contract management process (external) is where we decide with our clients their contract needs. FSI are very keen to promote the idea of solution partnering. We discuss with our clients the project strategy, their agenda and any other issues, which may affect the project. It is common for FSI to designate a project team, which consists of a Senior Consultant (Project Manager) an IT Consultant, a Support Engineer and a Trainer. This enables us to spread the knowledge of the project and develop a much wider client relationship. A nominated senior FSI executive monitors all FSI implementation projects.

In an effort to improve our after sales service to new and existing clients, FSI have recently appointed a dedicated Business Relationship Manager. His primary responsibility is to provide assistance in managing the communications interface between a client and FSI following solution implementation. FSI also host bimonthly user groups (with plans to develop this facility further to both our existing and prospective client base) providing opportunities for clients to be directly involved in shaping the Concept Solution of the future. This commitment to client relationship demonstrates the value FSI place upon realising a true partnering strategy.

At FSI we are committed to Total Quality Management through continuous improvement in both our products and services.
Client Sector Lists

Banks/Financial Institutions

FM Service Providers
Amey, BAM, BAM Ireland, Canary Wharf Management, Carillion, Cofely, Daikia Ireland, Daikia UK, Denne Maintenance, EC Harris, Europa FM Ltd, First Engineering, 4Evergreen FM, G4S Guernsey, G4S UK Limited, H&J Martin, Helistrat, Incentive FM, Integral, Inviron, ISS Facilities Services—Healthcare, Jaguar Building Services, Laing O’Rourke, Luminus Group, MITIE, Morrison Facilities Services, Noonan, Norland Managed Services, OCS, Sewell Group, Servest, Shepherd FM, Skanska, SPIE Matthew Hall, Vita Lend Lease

Government

Hospitals & NHS Trusts
Bradford NHS Trust, Brighton & Sussex University Hospitals NHS Trust, Coventry & Rugby Hospital Company, Derby City General Hospital, HCP, Kingston Hospital NHS Trust, Imperial College Healthcare, The London Clinic, Newham University Hospital NHS Trust, Northwick Park Hospital, Nottinghamshire Healthcare NHS Trust, Oxford & Radcliffe Hospitals NHS Trust, Rampton Hospital, Royal Liverpool Hospital NHS Trust, Salford Royal NHS Trust, St Andrews Hospital, Sandwell Mental Health & Social Care NHS Foundation Trust, United Bristol Healthcare NHS Trust, United Healthcare, Worthing & Southlands Hospitals

International
ABB Building Systems: Austria, Australia, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Norway, Portugal, Sweden, Switzerland, United Kingdom; Bluecare Queensland: Wesley Mission, Malthouse Theatre; QCS: New Zealand, Thailand; Eris Property Group: Sandton, Pretoria West, Johannesburg (South Africa); Carillion Construction, Canada; Draikinas, Nigeria; Honeywell Woodstock Hospital, Canada; Royal Ottawa Hospital, Canada; Serco, Hong Kong; Sandy Lane Hotel, Barbados; Sheraton Hotel, Ethiopia; PricewaterhouseCoopers, Cyprus; Royal North Shore Hospital, Australia

Legal
Allen & Overy, Ashurst, Clifford Chance, Norton Rose Group

Leisure & Entertainment

Media, IT & Telecoms
British Sky Broadcasting, Cable & Wireless Worldwide, Cap Gemini UK, Channel 4 Television, Telehouse, Trinity Mirror

Middle East
Abu Dhabi Commercial Bank, Abu Dhabi; ALDAR, Abu Dhabi; Atlantis The Palm Jumeirah, Cap Gemini UK, Dubai; The Avenues Shopping Mall, Kuwait; Bahrain Financial Harbour, Bahrain; EMCOR Facility Services, Dubai, Abu Dhabi, Bahrain and Kuwait; Emrill, Dubai; Engineer’s Office, Dubai; First Dubai Sky Gardens, Dubai; Hilton Hotels throughout the GCC; MAF Daikia, UAE, Bahrain and KSA; One & Only Resort, The Maldives; Royal Court Affairs of Oman, Oman; State Audit Bureau, Kuwait; Qatar Foundation, Doha in Qatar

Retail
Bullring, Marks & Spencer plc, Selfridges, World Duty Free

Transport
Airbus UK Ltd, Alexander Dennis, BAA, British Transport Police, Eurostar UK Ltd, Liverpool Airport, London City Airport, Network Rail, Stena Line, TFL, Translink

Universities & Colleges
Anglia Ruskin University, Birkbeck College, City University, London; Edinburgh Telford College, Glasgow College of Building & Printing, Imperial College London, London South Bank University, Motherwell College, The Robert Gordon University, South Lanarkshire Schools, University of East Anglia, University of Nottingham, University of Westminster

Other Industries
The information contained in this brochure is intended as a guide only and shall not form the basis of any contract except where expressly referred to in a written quotation. FSI reserve the right to vary availability, specification and functionality of Concept systems and modules at any time prior to a written quotation without notice. E&OE