
Net-FM™ Release Notes v 4.0.1

Introducing the New Version of Net-FM

The INSITE Team is happy to announce that Net-FM version 4.0.1 is now available for download. Version 4.0.1 is a service release that contains a number of enhancements and several important bug fixes. This release includes **INSITE PDF Service** (used for floor plan generation in Net-FM) **support for AutoCAD 2018**. Consortium Members planning to upgrade to Net-FM version 4.0 from a previous version¹, should go directly to version 4.0.1. This is a full install package and contains all necessary database scripting.

Note on AutoCAD & ACADLink: Consortium Members who use ACADLink are required to use AutoCAD 2016, 2017, or 2018 (and the corresponding ACADLink v 6.1.1 installation) for floor plan maintenance when running Net-FM v 4.0.1.

Note on .NET: Net-FM v 4.0.1 requires the installation of .NET version 4.6 on the Application Server. Please ensure **.NET 4.6** is present before attempting the installation. The web installer can be found here: <https://www.microsoft.com/en-us/download/details.aspx?id=48130>

With the exception of this document and the 4.0.1 System/Installation documentation, users should refer to the respective Net-FM version 4.0 files for this release. The following documentation is available through the INSITE Support site or by contacting INSITE Support directly:

- Net-FM Help/User guide – available directly from the help link in Net-FM and the Support site
- Space Survey help files – available directly from Space Survey
- Administration guide – available from INSITE Support
- Space Survey A to Z – available from INSITE Support
- System/Installation documentation – available on the INSITE Support site.

This document is organized in an easy-to-navigate format – simply use the following links to jump ahead to the respective section:

[New Features](#)
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¹ If the version from which you are upgrading is less than 3.0, please consult documentation and/or INSITE Support. It is necessary to upgrade the database to version 3.0 BEFORE running any additional upgrade scripts.

Please feel free to share any comments or ask further questions by contacting us at support@insite.org.

New Features

- **AutoCAD 2018 support** – INSITE PDF Service (used to generate floor plans in Net-FM) now includes support for **AutoCAD 2018**.
- **Single Sign-on (SSO)** – INSITE recently completed a custom SSO implementation for a member of the Consortium. If you are interested in utilizing SSO functionality with Net-FM at your organization, please contact INSITE Support for more information.
- **Move Management Features/Enhancements**
 - **Facility Contact / Project Manager approval** – It is now possible through Move Management settings to introduce a new business process → automatically route Moves from the Move Contact to the **Project Manager** (simply by including a Project Manager on the Move). The Project Manager is then able to make desired edits, add notes/documents, and submit the Move to the Move Administrator for final approval.
 - **Add Multiple Occupants feature** – For cases when you wish to include one or more occupants from a given space in a Move, simply use the **Add Multiple Occupants** feature. This feature allows you to quickly and easily retrieve a listing of the current occupants for a given space, select one or more records, and with a single click of a button, add the respective persons to the Move. You may then go back and edit the individual person records to make any of the necessary changes.
 - **Add Multiple Assets feature** – Similar to the “Add Multiple Occupants” feature, this enables you to quickly and easily retrieve a listing of Assets for a given space, select one or more records, and with a single click of a button, add the respective Asset records to the Move. Records may then be edited on an individual basis to make the necessary changes.
 - **Customizable Field Names** – Using “Column Attributes” in the Net-FM Administration module, it is now possible to customize a number of fields in Move Management that were previously hard-coded.
 - **Query/Sort by Project Manager** – It is now possible to query for one or more Moves based upon the value for “Project Manager”. Additionally, the Move results grid now shows the Project Manager, thus allowing you to sort by this field.

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Enhancements

- **Asset Module: additional fields** – By request, additional (10 more of each) **Code**, **Text**, **Number**, and **Date** fields have been added to Asset. By default the fields are delivered “hidden” and must be displayed using **Custom Settings**.
- **Space Contact: additional fields** – By request, additional (5 more of each) **Code**, **Text**, **Number**, and **Date** fields and one **Memo** field have been added. By default the fields are delivered “hidden” and must be displayed using **Custom Settings**.
- **Space Contact: Drill-up / drill-down** – Drill-up / drill-down columns link to Space and Person for Space Contact.
- **Facility Contact: additional fields** – By request, additional (5 more of each) **Code**, **Text**, **Number**, and **Date** fields and one **Memo** field have been added. By default the fields are delivered “hidden” and must be displayed using **Custom Settings**.
- **Facility Contact: Drill-up / drill-down** – Drill-up /drill-down columns link to Facility and Person for Facility Contact.
- **Occupancy: additional fields** – By request, additional (5 more of each) **Code**, **Text**, **Number**, and **Date** fields added to the Occupancy table.
- **Occupancy: Query by / display “Person Title” (from Person table)** – The **Person Title** field is now available from Occupancy query, advanced query, results, column attributes, and Floor Plan additional space label field.
- **Skills & Person Skills: additional fields** – By request, additional (5 more of each) **Code**, **Text**, **Number**, and **Date** fields have been added. By default the fields are delivered “hidden” and must be displayed using **Custom Settings**.
- **Move Management: Real-time changes synched on all forms** – All updates to **Move**, **Move Persons**, **Move Items**, and **Move Documents** made on the Move Contact form (by either the Move Contact or Project Manager) are automatically saved to the Move Administrator’s copy of the move. Prior to this change, there were certain stages (i.e. when Move Contact had made changes but had not yet submitted) where the information as viewed by the Move Contact and Move Admin was not in sync.
- **Move Management: cascade Move Admin updates to print-friendly page** – Now when the Move Administrator clicks the **Save Changes** button, these changes are automatically published to the print-friendly page except in cases where the Move is in **Distributed**, **Reconciled**, or **Archived** status.

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- **Space List – Replace Column: Responsible Person** – By request, a feature that had existed in pre-3.0 Net-FM has been reintroduced. It is now possible to use the **Replace Column** functionality with the **Responsible Person** field in the **Space List**. For spaces with split organization assignments, the function will skip over these spaces and leave them unchanged.
 - **Org-restriction Enhancements** – Code enhancements have been performed to improve the performance of select queries when run by org-restricted users in Net-FM. Additionally, a warning message now appears on the **Organization List Add** and **Edit** pages indicating that the user must run: “Admin | Settings | Other | Maintenance | Update Org Restricted Users” after making changes to the organization hierarchy.

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Bug Fixes

- **Space Viewer: cache issue** – Issue addressed with both the “Clear All” operation and the dropdown selection, whereby the Facility Gross Area and Address sporadically were not refreshed when making a new selection.
- **New Address Schema – Entered_by and Updated_by** fields now properly populated when saving/updating address records using the New Address Schema.
- **Space Details: Date format** – Issue addressed where the **Entered_Date** and **Updated_Date** were incorrectly displaying in European format and not adhering to the Global Date setting.
- **Person Skills: Save View** – Issue fixed where attempting to **Save View** on **Person Skills** results grid threw an error.
- **Move Management: Print-friendly page** – Resolved issue where “Access Denied” error was thrown when Move Contact attempted to access print-friendly page post-submittal of move.
- **Move Management: tab jumping** – Issue resolved where user was taken to a different tab post-addition of a new person to a move. Fix applies to the following: Admin – edit move, Move Contact form, Project Manager form.
- **Space Survey: Assigned Room Information (Room Detail) report** – Issue addressed where the Assigned Room Information report was incorrectly displaying the Use assignment from the database instead of the Use assignment specified by the Surveyor.
- **Space Survey: Supported Rooms report** – Resolved the error that resulted when attempting to access the **Supported Rooms** report from Survey.
- **Occupancy Edit: Person dropdown** – Issue corrected where the Person dropdown on the Occupancy Edit screen was incorrectly filtered according to the **PI indicator** in the Person table.

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