



User's Guide

EARNEST iFs

Interior Furnishings Specifier

- The [Table of Contents](#) contains links to each of the sections of the document, to move to a section just click on the link.
- Please read the [License Agreement](#), included in this document prior to installing this product, and register your license with Earnest Development. Your purchase, acceptance, or use of this Software or documentation will constitute your acceptance of the terms of the License Agreement.
- Assistance with set-up and additional support services are available from:
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Introduction

Thanks for Working in Earnest!

Earnest iFs™ is a unique application designed for interior designers and furnishings specialists to produce furnishings specifications efficiently and professionally.

- iFs is a database system that provides editing and data management features far superior to what is possible with spreadsheets or word processing.
- iFs can be used in a number of ways – to produce furniture “spec. sheets”, to track and report furniture quantities, to report room-by-room requirements, generate budgets, and manage furnishings standards. The number of projects and libraries that can be managed is unlimited.
- iFs enforces accuracy and productivity. Data-entry is quick, changes are immediately implemented, and errors are minimized.
- The pre-formatted, professional looking reports are ready for review or printing at any time.
- iFs supports multiple users in a networked environment, and moves easily on to a laptop for working off-site.
- The platform is Microsoft® Access™. The source code, objects and all Microsoft Access features are exposed, making the system infinitely scalable and customizable.
- The product support is exceptional. Earnest Development has been working with architects, designers and facilities professionals since 1984, and offers what ever you might need in the way of training, technical support, project consulting and database customization.

Table of Contents

[Introduction](#)
[License Agreement](#)
[System Requirements](#)
[Installation](#)
[Network/Multi-user setup](#)
[Multi-user data input](#)
[System Structure and Files](#)
[Table Relationships](#)
[System Maintenance](#)
[Customization](#)
[The Sample Project](#)

Earnest iFs Basics

[Projects](#)
[Specifications](#)
[Items Library](#)
[Pallet Library](#)
[Notes Library](#)
[Resources](#)
[Space Standards](#)
[Rooms](#)
[Room Finishes](#)
[Item Sets](#)
[Standard Item Sets](#)

Methods for Creating and Editing Data

[Entering data](#)
[Deleting data](#)
[Using Command buttons](#)
[Using Combo boxes](#)
[Using the "Add To List" feature](#)
[The Time Stamp](#)
[Reusing project data](#)
[Copying Room Data](#)
[Using Room Sets](#)

Getting Started

[Opening iFs](#)
[Main Screen](#)
[User Name](#)

Moving Between Projects

[Project Navigation screen](#)
[The Current Project](#)
[Open a Project](#)
[Create a New Project](#)
[Restore an Existing Project](#)
[Change a Project Name](#)
[Remove a Project](#)

Utilities

[Project Navigation](#) screen
[Revisions / Issue Log](#) editor screen
Display the Database Window
About
User's Guide

Editors

[Project Information](#)

Libraries

[Items](#) library editor screen
Accessories

- Lighting
- Seating
- Casegoods
- Tables
- Files and Shelving
- Softgoods
- Equipment

[Pallet](#) library editor screen

- Upholstery
- Carpet
- Floor coverings
- Wall coverings

[Notes](#) library editor screen

[Resources](#) library editor screen

- Manufacturers
- Dealers and Representatives

Quantities

[Standard Item Sets](#) editor screen

[Space Standards](#) editor screen

[Rooms](#) editor screen

[Room Finishes](#) editor screen

Reports

[Reports](#) screen

[Report Filtering](#)

[Report Print Preview](#)

[Report settings screen](#)

[Edit Report list](#) screen

System Requirements

- **iFs** version 9.0 (iFsv9) is a Microsoft Access 2000 application using an set of interdependent .mdb files.
- Microsoft Access 2000 is compatible with the Microsoft Windows operating system, and is purchased separately.
- All machines that will be using **iFs** require a licensed copy of Access 2000, (a "full install" of Access is recommended). **iFs** v9 is not compatible with other versions of Microsoft Access.
- Earnest **iFs** system files require approximately 10 MB of disk space. Each new project created will require a minimum of 600 KB of additional disk space.
- Editor screens are designed for Super VGA, 800 x 600 pixels, 256 colors and small fonts. Other display settings may result in the need to scroll vertically and horizontally to view the full screens.
- Machines that have more than one version of Microsoft Access installed may require additional configuration.
- To view the HTML version of the **iFs** User's Guide requires Windows Explorer (v4.0 or newer), Netscape Navigator (v4.5 or newer), or other similar Browser software.
- To view the .pdf version of the **iFs** User's Guide requires Adobe Acrobat (v4.0 or newer), or Acrobat Reader (available free from Adobe).

Installation

Using Windows Explorer, create a new folder on the c: drive **C:\EARNEST**

- Copy all **iFs** files, Including subfolders, to the EARNEST folder.
- For Multi-user licensees, also:
 - Create a folder on a shared network drive named **EARNEST_Master**. Make sure the drive is included in your network's routine back-up.
 - Store a copy of all **iFs** system files in this location as a backup copy, and for use when installing **iFs** on new machines.
 - Update the master files if you receive an update file from Earnest Development, or if you customize the **iFs** application.
 - If desired, create a Windows desktop shortcut to launch **iFs**, using the **iFs** icon included with the system files.

Network / Multi-user setup

If you have a network environment, users can work on an **iFs** project from different workstations, and multiple users can work on a project simultaneously. The recommended setup is as follows:

- Purchase a multi-user "Site" license of **iFs** and Microsoft Access.
- Identify a directory for the project files on a shared server drive.
- Confirm that all users are connected to the network, and have full read/write permission to access the server and shared directory.
- Confirm that the sharing option for Microsoft Access is set to "Shared" on each PC (see instructions in "Multi-user Data Input" section)
- Install the **iFs** system files on the local drive on each user's workstation.
- Store project data files in a shared directory - users will attach to projects from their copy of the **iFs** application. At the time a new project is created, save the project to a shared directory to make projects available to other users.
- If a project is first created and saved on a local drive, it can be moved to a shared location to allow access by other users.
 - First, confirm that the location you intend to move the file to is accessible to the appropriate people, and that permissions are set to "Read/Write".
 - Close **iFs**.
 - Open Windows Explorer and move the project.mdb file to the new directory.

- Open iFs – if the last project you had open is the one you moved, you may be prompted to browse to and select the new location of the file.
- Other iFs users can connect to the project by using the "Restore" routine which is launched from the "Project Navigation" screen.
- For additional instructions regarding a Multi-user environment, see the "Multi-user Data Input" section in this guide and your Microsoft Access "User's Guide".

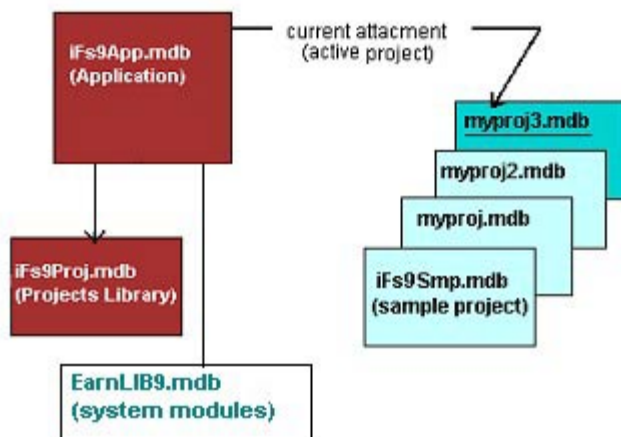
Multi-user Data Input

If your computer is connected to a network, you can open a database exclusively, or you can share it with others to view and edit at the same time. The following is a brief description of multi-user settings available to you in Microsoft Access (for more information on this and security, see your Microsoft Access "User's Guide").

- Once the application is open, you can check and/or change this setting on your computer by choosing from the menu bar ; [Tools], [Options], [Advanced]; and set the default Open Mode For Databases option to "shared".
- When working in a multi-user environment, others can change or even delete the same data you are trying to edit. Because of this you may occasionally get messages that prompt you to make choices in order to resolve conflicts. A record will occasionally be locked because of another user's activities. If this happens, wait a few seconds and try again.
- Multi-user options can be set to suit your own situation. Microsoft Access has three record locking schemes.
 - To change the setting, from the top menu bar choose [Tools]; [Options]; [Advanced]
 - The three locking schemes are:
 - No Locks ("optimistic") permits multiple users to edit the same record simultaneously. This is the default setting.
 - Edited Record ("pessimistic") permits only one user to edit a record at a time.
 - All Records (the most restrictive) locks all records in a form and underlying tables for the entire time you have the form open.
 - For more information on record locking and security, see your Microsoft Access "User's Guide"

System Structure and Files

The iFs system is composed of three interrelated Microsoft Access (.mdb) files, the application (APP) file, the Project Navigation (NAV) file, and a project data (DAT) file, plus image and document files.



- **IFS9App.mdb** - Application file ("APP") - contains all interface-related objects including modules, macros, queries, forms and reports.
 - The APP contains links to tables in the active project database ("DAT") and the project's directory database ("DIR").
 - The APP contains a link to the Earnest Products system modules in the file EarnLIB9.mdb as a vb reference.
- **IFS9Proj.mdb** - Project Navigation file ("NAV") - contains the table "tblProjects", which stores project names and data paths used in linking project databases to the APP, and the table "tblUsers", which stores the user log-in names.
- **IFS9Dat.mdb** - Backup Project Data file ("DAT") - a master copy of the project database tables, with only base system records.
- **IFS9Smp.mdb** - Sample project file - a project data file ("DAT") containing records for the IFs Sample Project.
- **IFSIcon.ico** - The IFs Icon, for use with a Windows desktop shortcut.
- **EarnLIB9.mdb** - Earnest Products system modules, shared by all Earnest Products database applications.
- **I fsUG.pdf** – (This document) - User's Guide, in Adobe Acrobat (.pdf) format
- **.jpg and .bmp files** - Image files associated with the User's Guide

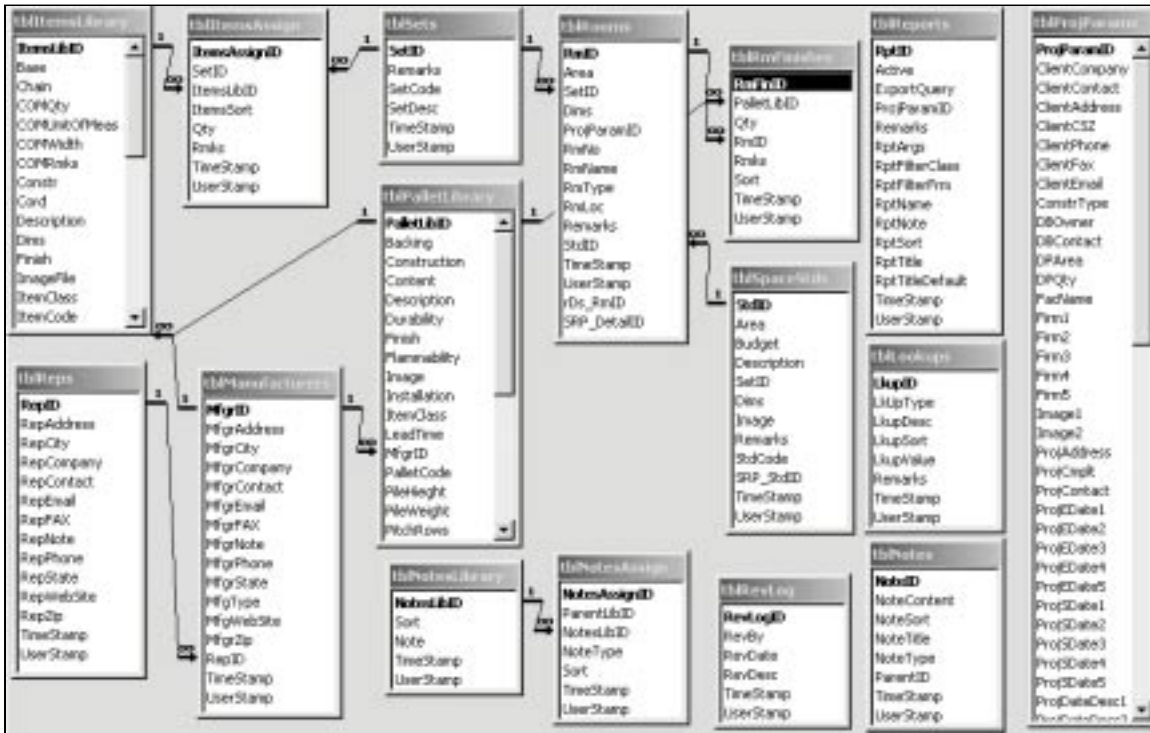


Table Relationships

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

- A unique DAT file is created for each project.
- When a project is opened using the "Project Navigation" screen, the tables for the selected project are linked.

Customization

iFs is entirely customizable, and does not restrict the user from utilizing the considerable sorting, filtering, querying and reporting capabilities provided by Microsoft Access.

- While iFs incorporates many timesaving features and a range of reports, you may want to modify or enhance the application to meet your special project needs. Learn more about Microsoft Access through the Microsoft Access "User's Guide", on-line Help and numerous publications available at book and software stores.
- iFs incorporates a significant amount of programming code behind the scenes. Any customization of existing tables, queries, forms, reports, macros or modules should be on duplicate copies to avoid inadvertent effects on existing functionality. Contact Earnest Development for assistance - we can save you hours of time.
- We're available to assist you in making modifications of all kinds; provide formal or informal training sessions; or provide project-specific services to suit your needs. Our services are provided promptly, and at affordable rates.

System Maintenance

As with all computer files, it is essential to maintain BACKUP copies of all important files. Database files can and do get misplaced, damaged and overwritten from time to time. (Contact Earnest Development to obtain a current list of true emergency stories!)

- The application (iFs9App.mdb) can always be reloaded using the setup disks provided at the time of purchase, however, if you have customized or added new queries or reports to your application, these will not be reflected on the standard product setup disks. Make a backup of the application any time enhancements are made.

A project DAT file ("projectABC.mdb") is created for each new project. If projects are stored on a server, familiarize yourself with how to contact the network administrator, the routine backup schedule and understand the procedure for restoring lost or damaged files. If in doubt, or if you are storing your projects on your local (c:) drive, make a backup of any active projects onto a separate network drive, zip drive or diskette on a routine basis.

Earnest iFs Basics

iFs allows information to be input, edited and reported in any order. The following are a few of the basic concepts and terms used in iFs that the user should become familiar with.

Projects

iFs manages information one "Project" at a time. A project in iFs can be defined by the user in various ways. One project might be a single facility with a unique set of specifications. Another project might be identified as the "Master Specifications Library", and be used to store specifications for furnishings that are frequently used on various projects. Another project might be dedicated to a client's specification standards for multiple facilities. Each iFs project is stored in a separate file, and cannot be easily split or merged.

[<more>](#)

Specifications

Specifications are organized into two main Libraries: the "Items Library" the "Pallet Library", and both are supplemented by a "Notes" library.

- Specifications are identified by an [Item Class], [Code] and [Name].
- Specifications all have a base set of fields like [Manufacturer], [Name], [Number], etc. Additionally, some item classes allow assignment of C.O.M., while others may have unique fields like [Power] or [Backing].

[<more>](#)

Items Library

The Items Library is made up of specifications that the user creates for a specific project, or has copied from the Items Library of another iFs project. The Items Library is organized into nine "Item Classes":

- Accessories: coat hooks, desk accessories, etc.
- Seating: chairs, sofas, stools, etc.
- Casegoods: desks, cabinets, etc.
- Tables: Work tables, occasional tables, etc.
- Panels & components: modular/system furniture components.
- Files and shelving: file cabinets, metal shelving, lockers, etc.
- Lighting: task lights, hanging fixtures, etc.
- Equipment: carts, exercise equipment, appliances, etc.
- Softgoods: mattresses, throw pillows, etc.

[<more>](#)

Pallet Library

The Pallet Library is similar to the Items Library, except that the specifications are configured for finish materials, yardgoods, and the like. The Pallet Library is organized into four "Item Classes":

- Upholstery: c.o.m. fabric, leather, vinyl, etc.
- Carpet: area rugs, carpet tile, carpet, etc.
- Floor coverings: vinyl flooring; tile; linoleum, etc.
- Wall coverings: vinyl wall covering, wall paper, tile, etc.

[<more>](#)

Notes Library

A library of standardized notes for use in specifications.

[<more>](#)

Resources

Includes information on manufacturers, manufacturer's representatives and dealers.

[<more>](#)

Rooms

A "Room" is identified in iFs by a [Room number] and [Name]. In order to generate quantifications and budgets for the project it is necessary to create at least one room with an associate Item Set.

[<more>](#)

Room Finishes

Materials specified in the Pallet Library, such as carpeting or wallcovering, can be quantified by assignment of the item to one or more Rooms.

[<more>](#)

Quantification

There are several ways that quantities are generated in iFs:

- Items specified in the Items Library are assigned to a Standard Item Set which is assigned to at least one Room.
- Items specified in the Items Library are assigned to a Room with a Unique Item Set.
- Material specified in the Pallet Library is assigned as C.O.M for an Item in the Items Library, which has been assigned up to at least one Room.
- Material specified in the Pallet Library is assigned as a room finish.

[<more>](#)

Space Standards

Space Standards are included in iFs to provide a means to link the standards that are typically established in the Programming phase of a project to the more detailed room-by-room furnishings requirements. The use of space standards in iFs is handy in those projects where the relationship between Space Standard, Room and Standard Item Set is important.

[<more>](#)

Item Sets

There are two types of Item Sets:

- "Standard" Item sets: sets that are given a Set Code and can be assigned to multiple rooms.
- "Unique" item sets: one-of-a-kind sets that have no Set Code, and are assigned to one room only.

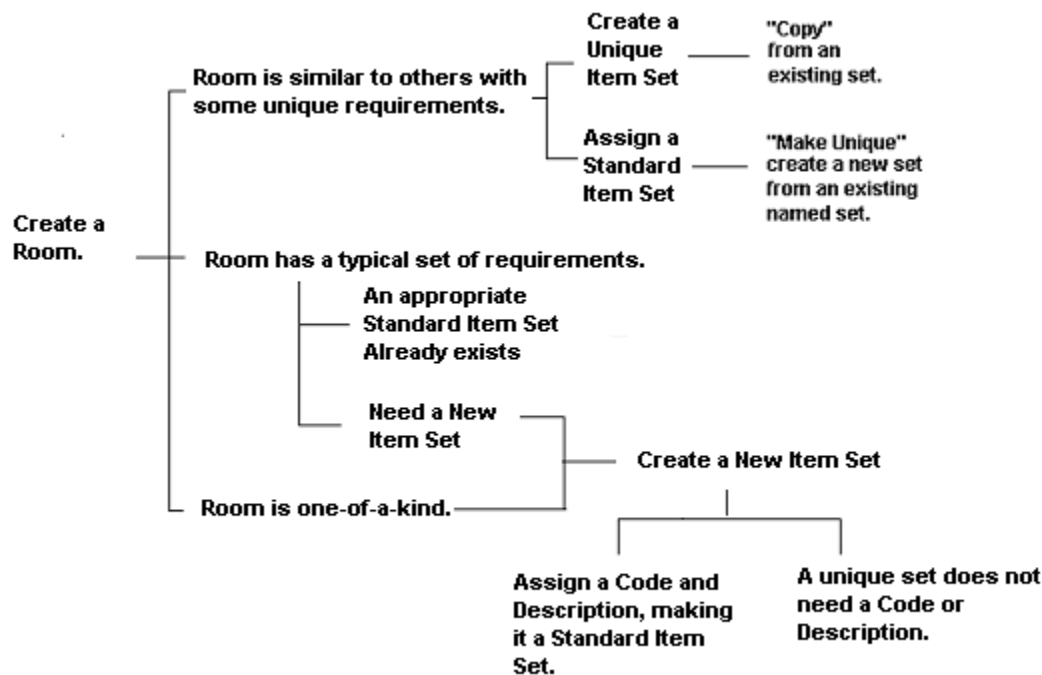
Item Sets can be created and used in a number of ways.

- A single Unique Item Set can be created to quantify all items specified for the project.
- A Unique Item set can be created for each and every room.
- Standard item sets can be created for each unique collection of items (it is not mandatory that a Standard item set be assigned to multiple Rooms).
- A combination of unique and standard Item Sets can be used if the project has a mix of typical and a-typical spaces.

Standard Item Sets

You can minimize input time and inconsistent data by assigning a Standard Item Set rather than creating a unique set for each room.

- Use a Standard Item Set when typical furniture configurations occur for more than one room.
- Changes to a Standard Item Set are "globally" updated for all rooms with the same set.
- Standard Item Sets can be used as templates for additional sets. There are two methods for doing this
 - Copy – copy in items from any existing set.
 - Make Unique – create a unique set from any Standard set.



Methods for Creating and Editing Data

Entering Data (Editors)

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

- **A coding system for specifications**

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

- **A room numbering system**

Room numbers must also be unique, can be changed, and work in much the same way as codes. If in your project, room numbers are unnecessary or unknown, any sequential set of numbers or characters can be utilized to differentiate rooms or areas from one another.

- **Project documents and reference materials at hand**

Collect as many of the documents, catalogs, tear sheets, drawings and notes you can to make your work session productive. Sometimes it is valuable to set up a rough library of specifications and assignments to get preliminary counts. iFs specifications and room data can be easily expanded or changed. If you find that you have the whole resource library to your self for the next few hours, you may want to concentrate on developing the specifications first!

- **Allow sufficient time to get acquainted**

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

- **A few handy keyboard tips**

- Use the arrow keys and tab key to move around the form.
 - When the cursor is on the desired control, type in the text.

- To accept, press the enter key. This will also move the cursor to the next field.
- Use the Esc key to undo an new entry or record.
- To insert the current date press CTRL+SEMICOLON (;)
- To insert the current time press CTRL+COLON (:)
- To insert the value from the same field in the previous record press CTRL+APOSTROPHE (')
- To add a new record press CTRL+PLUS SIGN (+)
- To delete the current record press CTRL+MINUS SIGN (-)
- To save changes to the current record press SHIFT+ENTER
- To switch between the values in a check box or option button press SPACEBAR
- To insert a new line in a text box press CTRL+ENTER
- To copy a selection of text, select it with the cursor and press CTRL+C
- To paste a selection of text, select the destination with the cursor and press CTRL+V
- Mouse: Point the cursor at the desired control and click to anchor the cursor.
- Copying text is accomplished in a variety of ways, much like other Windows applications. In addition to the method described above using the keyboard you can also use the mouse:
 - Highlight the source text; right click the mouse and select Copy;
 - Move the cursor to the destination; right click the mouse and select Paste.

Deleting Data (Editors)

iFs contains table relationships that in some cases result in "cascading deletes". These conditions should be fully understood by the user before deleting any records. Text and Records can be deleted in a variety of ways:

- Highlight the text and press the Delete key, or cut text by pressing Ctrl + X, which will store the text for pasting into another record or field.
- To delete an entire record, first make it the "active" record.
 - If the screen you are working in shows multiple records, the record selector (the gray column at the far left side of the screen) displays an arrow indicating the active record.
 - If the screen shows only one record, the record that is displayed is the active record.

	Set	Description
	ADMIN	Typical Arr
	ELEVLOB	Typical Ele
	LR.01	Typical Lie
	RR.01	Restroom
▶	STOR.01	Typical Stc
*		

Once you have the correct record active, press the Delete key, or right click the mouse and select "Delete Record", or press CTRL+MINUS SIGN (-).

- Deleting records will in some cases also delete "related" records (this is a "Cascading Delete"). This action ensures there are no orphaned records that would fail to report or calculate properly. There will be warning messages when this is the case. Deleting any record should be done only after careful consideration.
- First, consider how the deletion would affect your overall database; rather than deleting, it might be more appropriate to re-name or change it. For example:
 - If you delete a record from the Items Library or Pallet Library, all instances where the item was assigned in your project will also be deleted. Consider giving the item a different [code] or [description] rather than deleting it. Reports in **iFs** can be filtered to exclude items that are not used in the project.
 - If you delete an "Standard Item Set", any rooms where it had been assigned will need a new set of items assigned. You may want to first check for rooms that it has been assigned to. Instead of deleting the set, you may want to make the set "Unique" to a specific room, or change the [Code] and [Description], or un-assign it for certain rooms.
 - If you delete a "Room" with a "Unique" item set, the item set will also be deleted. If this is not desirable,

consider changing the name or number of the Room, or add a [Code] and [Description] to the item set, thereby making it a "Standard Item Set", before deleting the room record.



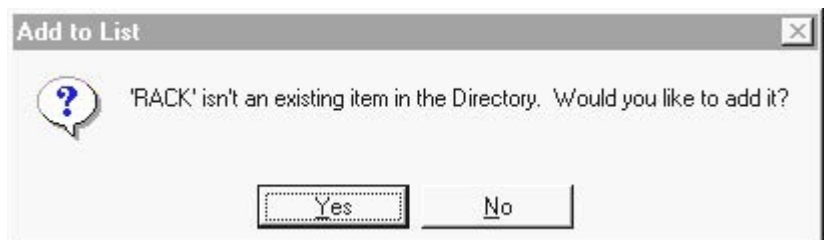
Command buttons and tool tips (editors):

- Command buttons are found in many of the **iFs** editor screens - these are controls that launch other screens, or activate an automated routine.
- The "Tool Tip" for any Command button is displayed when you place your cursor over the button.
- To activate the command, place your cursor over the button and single-click.
- In the example above, the "New" button is clicked to move to a new record.

Room Set (blank if unique)	
WAIT.02	
EXAM.02	Exam Room 2
EXAM.03	Exam Room 3
NS.01	Nurses Station
PAT.02	Typical Patient Rm, 2 bed
WAIT.02	Waiting area, Large
WAIT10	Waiting area, 10 seats
WC.P	Patient Toilet
WC.W	Toilet, Womens, 4 stall

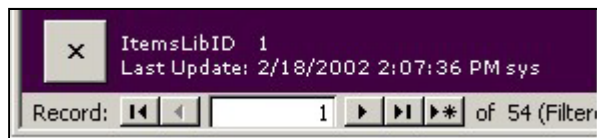
Combo boxes (editors):

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



"Add to List" feature (combo boxes on editors):

- If a value typed into a combo box is "Not in List", a message appears that it is a new value, and the opportunity to add it is offered.
- If the new value should be added, click the [Yes] button. If not, click [No].
- If the value you entered requires additional information, an "Add to List" dialog box will be displayed to add the additional information.
- In the "Add to List" dialog screen, typically the "Description" is required, and all other fields are optional.
- After the value has been added to the list, it is available in future instances.



Time Stamp (editors):

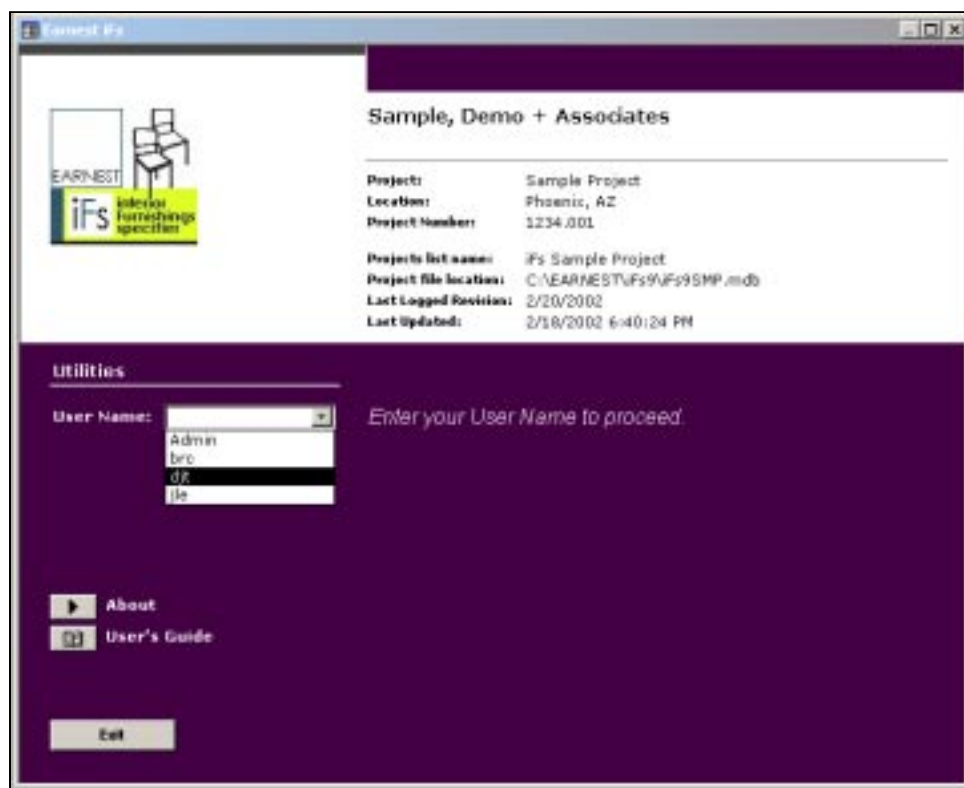
- When a record is added or modified in any of the primary tables, a "Time Stamp" field is updated automatically, with the current date and time.
- The Time Stamp is labeled "Last Update", and is located at the bottom left on most editors. It is not editable by the user.

Getting Started

Opening the Earnest iFs application

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

- Double-click on the **iFs desktop shortcut** that was created as part of your installation of **iFs**.
- Or From *Windows Explorer*:
 - Find the directory that contains the **iFs** application file (usually c:\iFs9)
 - Double click on the file "iFs9App.mdb" (make sure this launches Microsoft Access 2000, **iFs** v.9 will not run in other versions of Access).
- Or From the *Start Button*:
 - Select "Program Files"; Microsoft Access (make sure this launches Microsoft Access 2000, **iFs** v.9 will not run in other versions of Access).
 - From *Microsoft Access*: select "Open an Existing Database"; select "iFs9App.mdb".



The Main Screen

The "Main Screen" is displayed when the **iFs** application is launched, and should remain open in the background throughout the session.

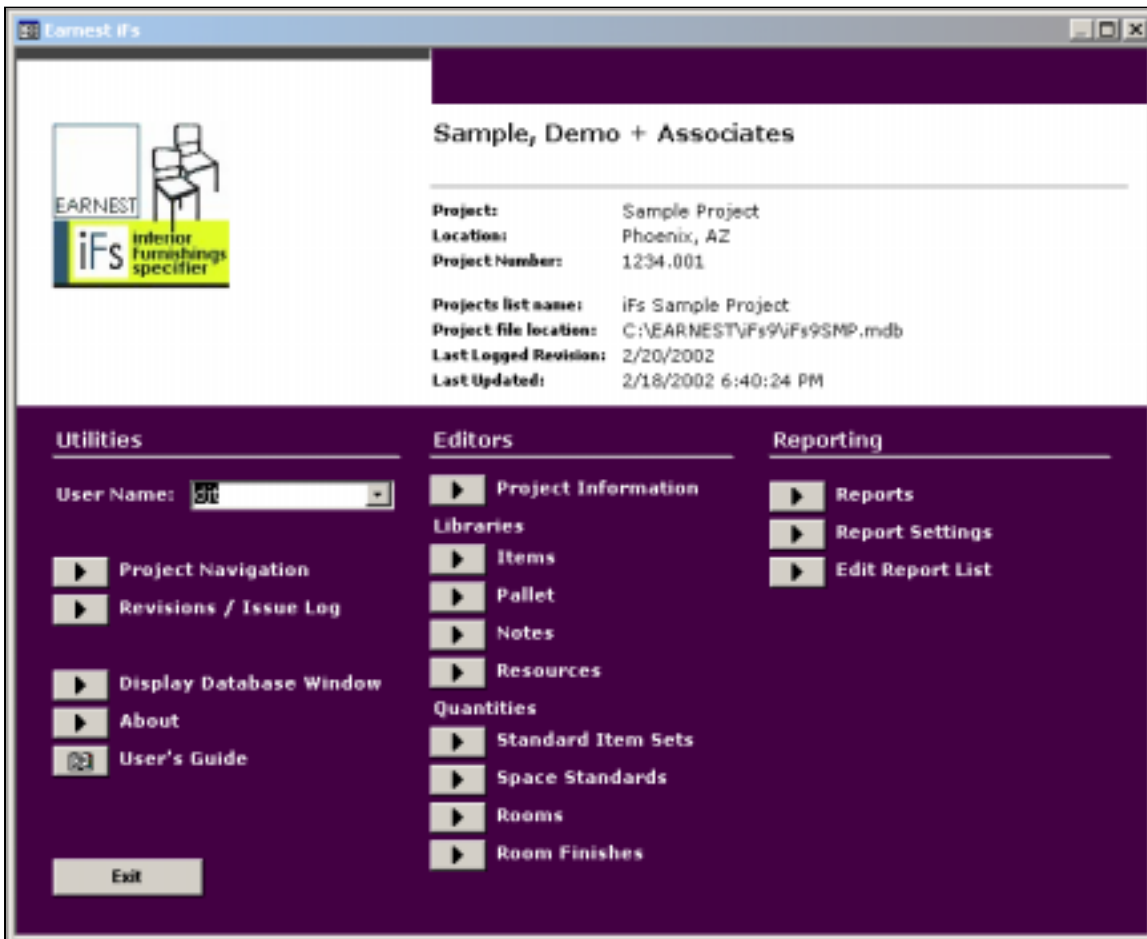
- The "Main Screen" is used to Login, view project information, and navigate to all other **iFs** screens.
- When the **iFs** application is initially opened, the project that was last open is re-attached automatically.
- The project information displayed on this screen is for the project that is currently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

Main screen - User Name

- To begin using the **iFs** application, a value must be entered in [User Name]. Login values are usually short codes,

typically the person's initials.

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



Main screen - Project information section

This information is read-only on the "Main Screen". This data is input in the "Project Information" screen.

Main screen - Utilities section:

- Click the [Project Navigation] button to move between projects, or create a new project.
- Click the [Revisions / Issue Log] button to view or input information about updates or revisions to the data, dates when documents are issued, and other project milestones.
- Click the [Display Database Window] to display the Microsoft Access database window (recommended for advanced users only).
- Click the [About] button for information about Earnest Development, **iFs** and the version you are running.
- Click the [User's Guide] button to view the Earnest **iFs** User's Guide (this document).

Main screen - Editors section

Buttons in this section launch the screens that allow you to create, view, or edit data.

Main screen - Reporting section

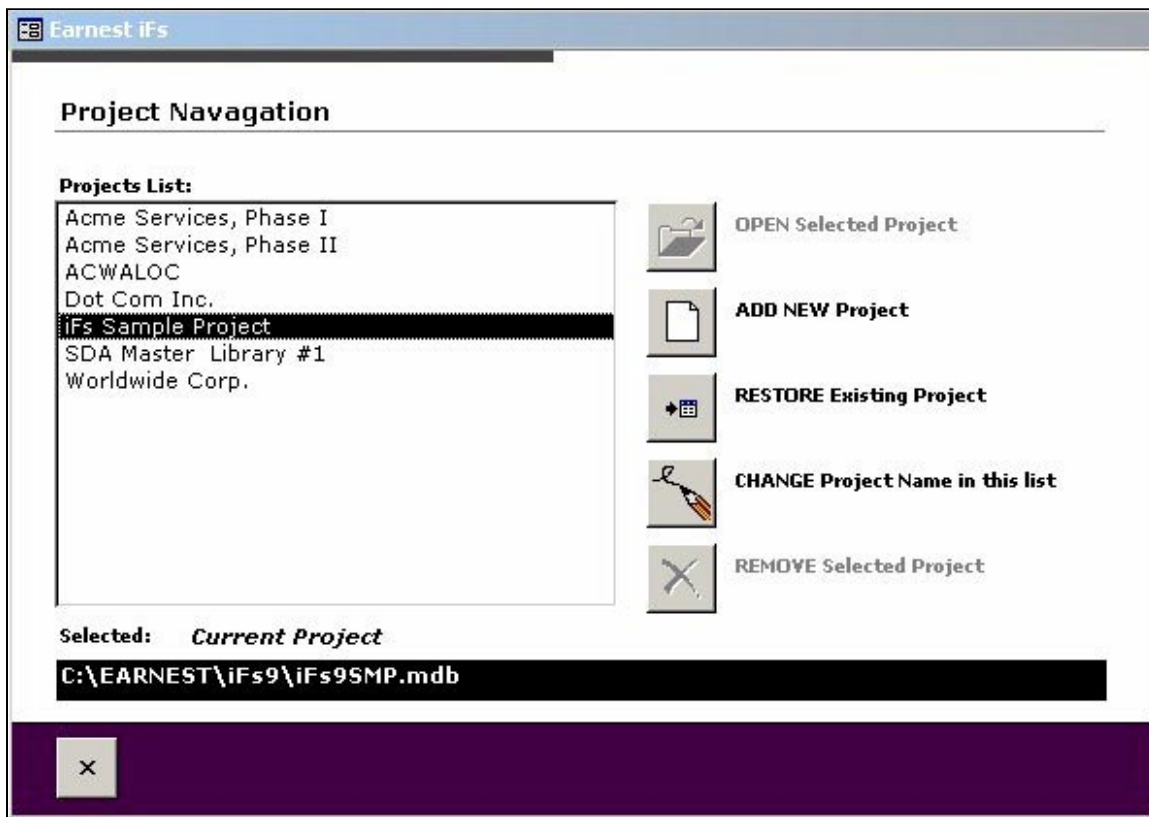
Buttons in this section launch the screens that allow you to edit settings, view and print reports.

The Sample Project

A sample project is included with the system files for you to explore and become familiar with the system.

- The sample project file is named **iFs9Smp.mdb**.
- The Sample Project data can be edited, reported and copied.
- Sample Project data is fictional, and not intended as a guideline for an actual project.

Managing Projects



Project Navigation screen

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

The "Selected" and "Current" project (non-editable fields on the bottom of the "Project Navigation" screen):


- When you first open the "Project Navigation" screen, the current project file path & name are displayed as "Selected" at the bottom of screen, and the "Current Project" message displayed.
- When you highlight a different project in the list, the path & file name for the highlighted project is displayed, and the "Current Project" message is no longer displayed.
- **OPEN Selected Project**
 - Button is enabled only when the selected project is not the current (already open) project.
 - To **Open** an **iFs** project:
 - In the "Project Navigation" screen, highlight a project in the Projects List.
 - Click the [Open Selected Project] button (or dbl-click on the item in the list box) A message will be displayed when the project attachment is complete (usually just a second or two, depending on your PC and/or network performance).
- **ADD NEW Project:**
 - Opens the New Project screen.
- **CHANGE Project Name:**

- Change the name of the project as it is displayed in the "Projects List".
- **REMOVE Selected Project:**
 - The [Remove] button is enabled only when the selected project is not "current" (already open). You cannot delete a project while it is open. To delete the "current" project, you must first move to a different project.
 - Deleting a project removes it from the Projects List, but it does not delete the actual project .mdb file. The project can be subsequently "Restored", as long as the project.mdb file has not been permanently deleted.
 - To delete an project.mdb file permanently, you must delete it through Windows Explorer, or other file management utility.

Earnest iFs

New Project OK

Name for Projects List:

File name and path: 

Data source:

New database (empty, no records)

Copy from an existing project

Source Project: ▼

Copy the entire database (all records)

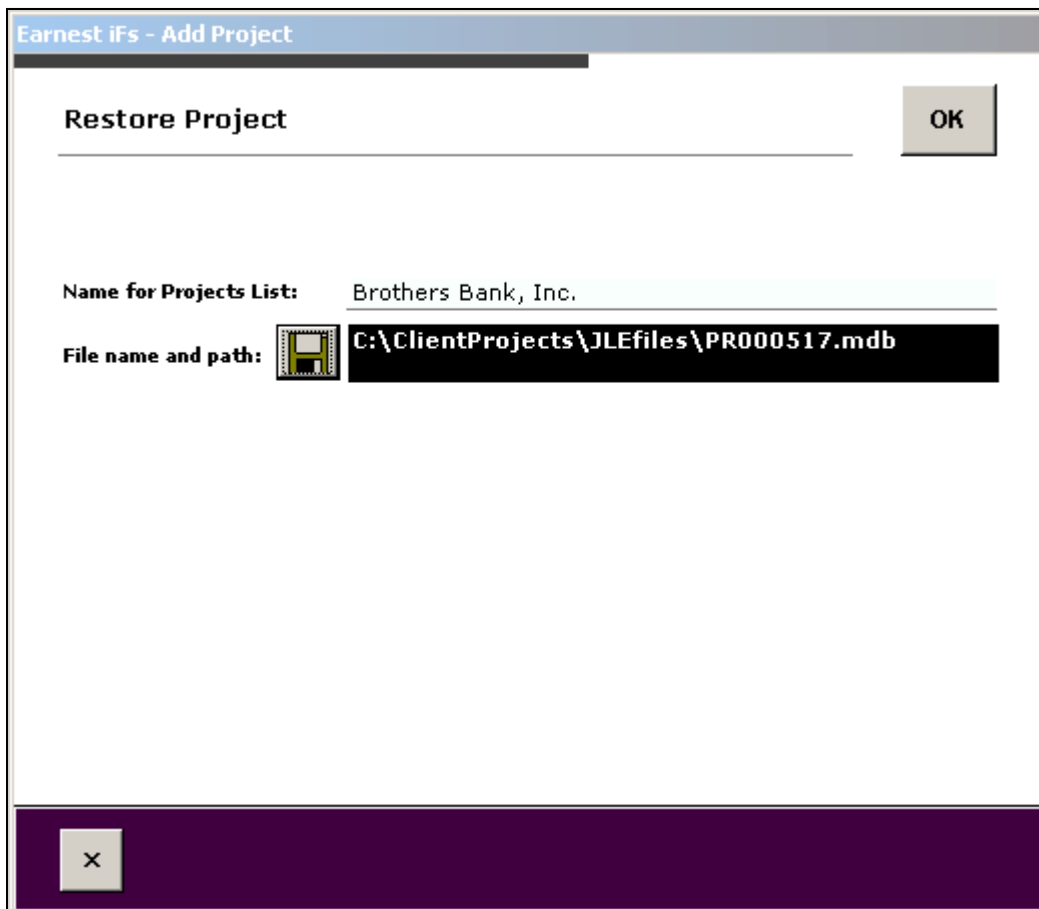
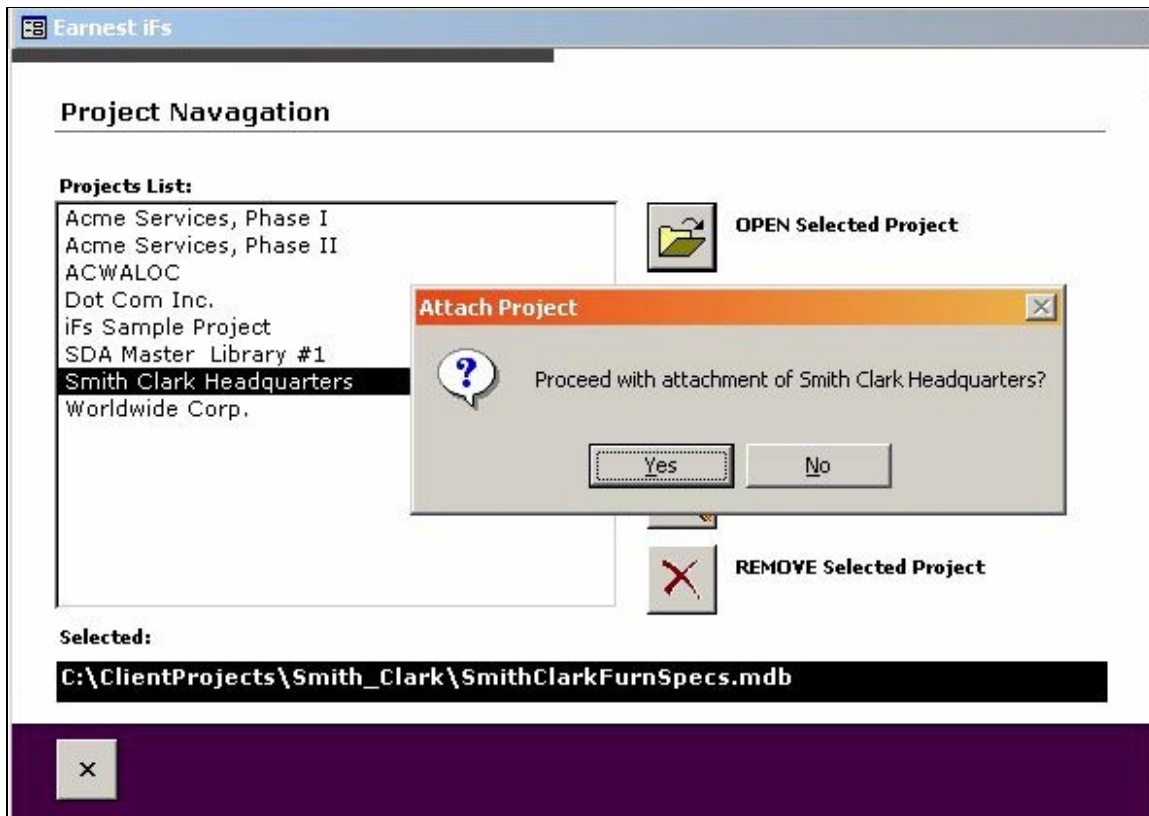
Copy Sets, Standards, Libraries and Resources

Copy Library and Resources

X

The New Project screen

- In the "New Project" screen you can create a new iFs project.
 - Enter a "Project Name" (this is the name that will be displayed in the Project List on the "Project Navigation" screen).
 - Click the button labeled "File name and path"
 - In the "Save File" window, find and select the directory you wish to save the project file in, and enter a file name.
 - Click the [SAVE] button.
- Choose a Data Source.
 - Choose "New database" to create a shell project. Only essential system data is included in the tables.
 - Choose "Copy" if you wish to create a project using some or all of the data from an existing iFs project.
 - If you choose "Copy", select the project you wish to copy from, and check one of the three boxes that applies to your needs.
 - Click the [OK] button. A message will be displayed when the action is complete, and the name of the new project will be added to the Projects List.
- When you are finished with adding new projects, close the "New Project" screen.
- Open the project by double-clicking on the name in the projects list.

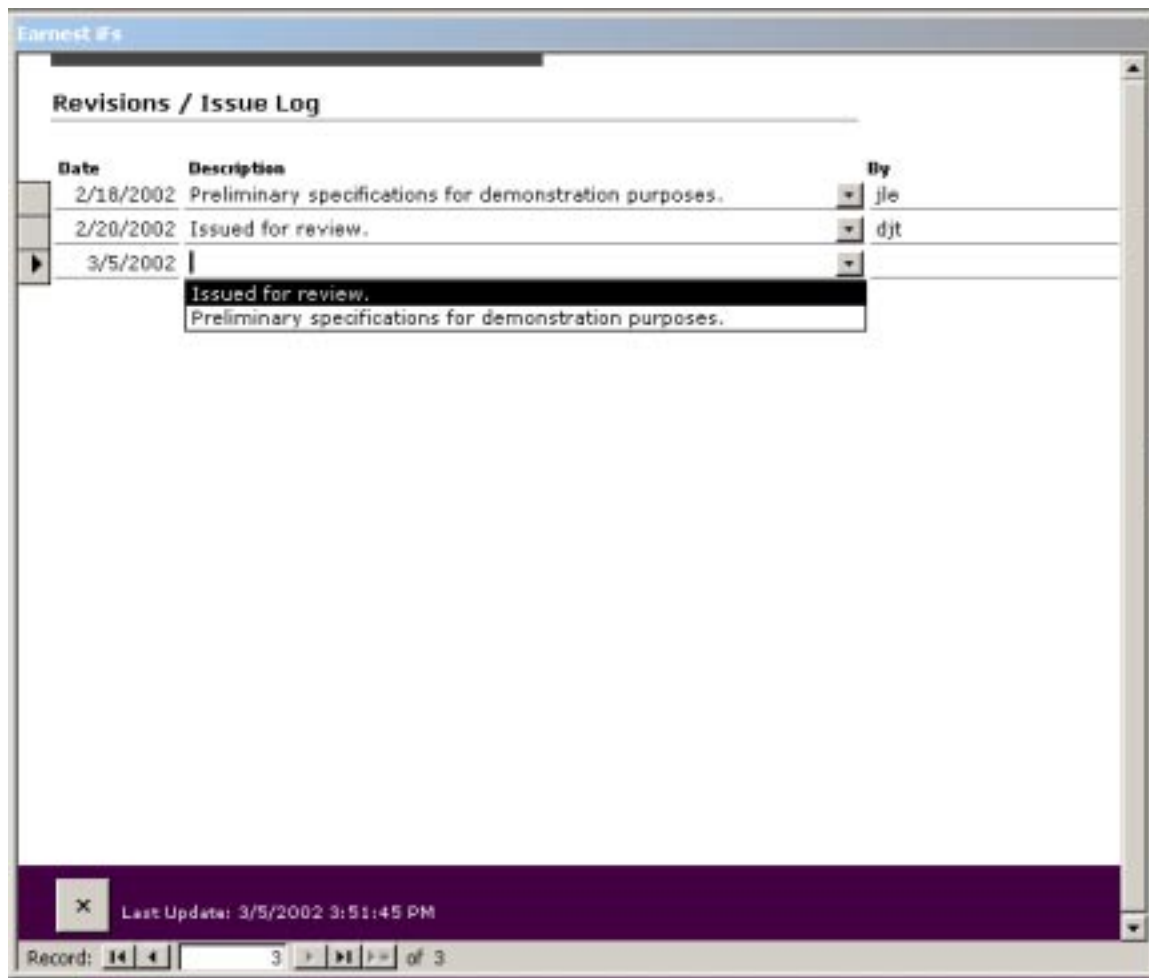


Restore Project screen

- If a project has been removed from The Project List in the "Project Navigation" screen (by using the [REMOVE] button), it can be "Restored" at any time.

- In a typical installation of iFs, the Project Directory file (iFs9PROJ.mdb) is installed locally, and is not shared by users. A project will initially be listed only in the "Projects List" belonging to the user that created it. In a multi-user networked environment, users can access a project created by others (when stored on a shared server drive) by "Restoring" the project
- To **Restore** a project:
 - In the "Project Navigation" screen, click the [RESTORE] button.
 - Enter a "Project Name" (this is the name that will be displayed in the Project List on the "Project Navigation" screen).
 - Click the button labeled "File name and path"
 - In the "Locate File" window, find and select the file you wish to restore.
 - Click the [OK] button.
 - The project is now included in the Project List on the "Project Navigation" screen.

Project Data Editors



Revisions / Issue Log Screen

From the Main screen, "Utilities" section, click the "Revisions / Issue Log" screen.

- Record milestone revisions to the project data, progress notes, submittals and issue dates.

Project Information

Proj. Name: Sample Project
 Proj. Number: 1234.001
 Facility Name: Acme Industries Corporate Headquarte
 Location: Phoenix, AZ
 Client: Acme Industries
 Contact: Joe Acme
 Address: 123 Jefferson Street
 City/State/Zip: Seattle, WA 98101
 Phone: 206.622.1950 Fax: 206.292.3951
 Email: jacme@acme.com
 Project Type: Corporate Office
 Cost Type: New Construction

Team

Database Owner: Sample, Demo + Associat Jean Sample
 Architect: Sample, Demo + Associat Craig Demo

Company

Company: Sample, Demo + Associat

Contact

	Start	Complete
Project Duration		

Ship To

Company: Acme Industries
 Attention: Fred Willbether
 Address: 1000 Acme Expressway
 City/State/Zip: Phoenix AZ 12345-43
 Phone:
 Fax:
 Email:

Shipping Instructions:

Notes

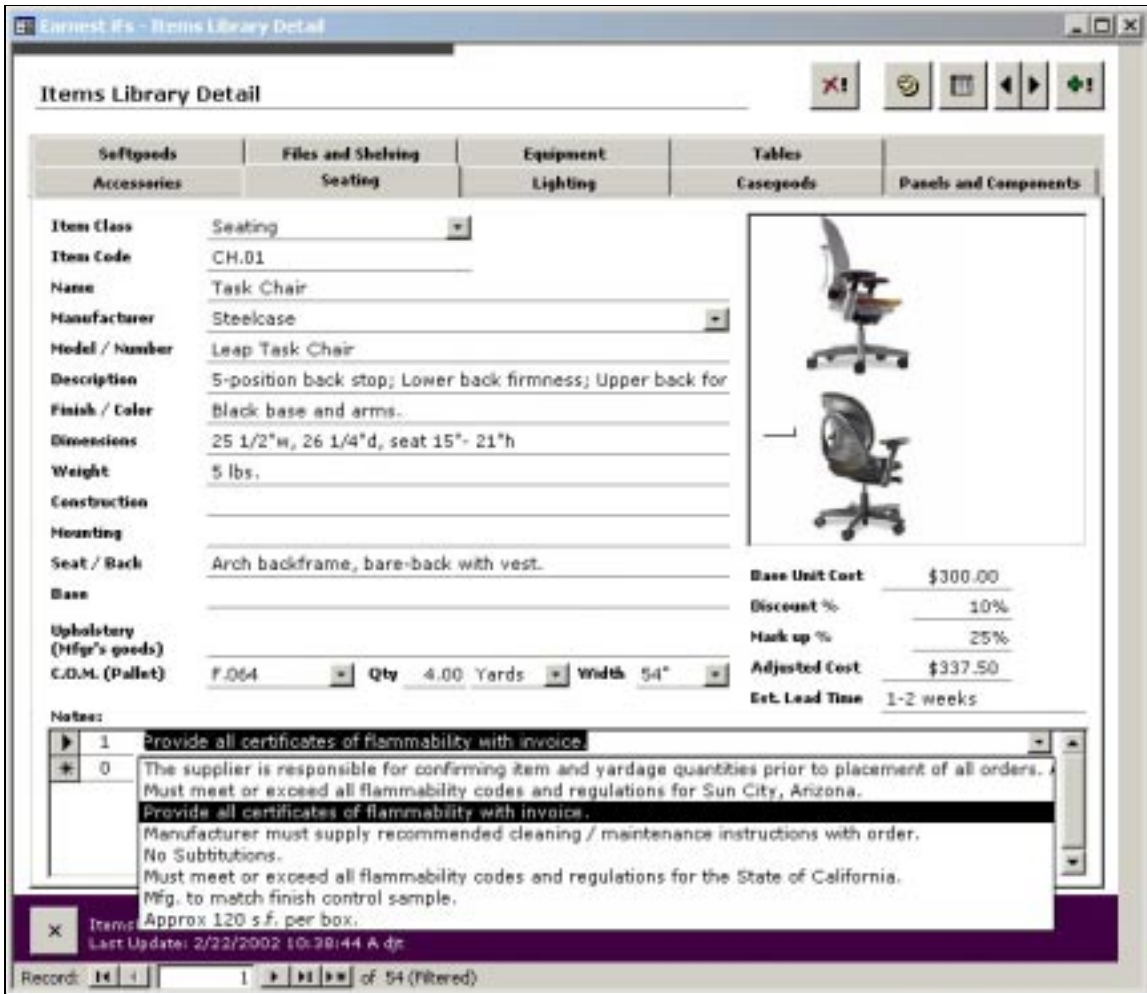
Sort	Title	Note
1	General Notes	These are the general notes for the Project. They can be numbered.
2	Growth	The growth requirements notes would go here.
3	Next Steps	Once the project is set up, we can begin to put in data. Admin 2/18/2002 2:24:20 PM

Last Update: 2/18/2002 6:40:24 P Admin
 Database owner, company name.

Project Information editor

From the "Main Screen", Editors section, click the "Project Information" button.

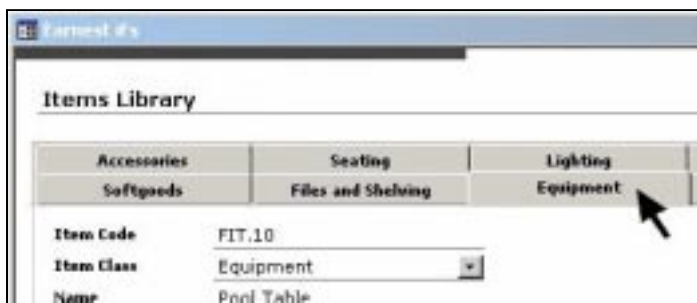
- "Project Name", "Number" and "Database" Owner appear on the Main screen and should be filled in for all projects.
- Other information is not required, and may be filled in, or changed, at any time.
- Client – the firm or company for whom the specifications are being prepared.
- Team – the key team for the project.
 - The "Database Owner" is typically the firm or company who is responsible for creating and managing the the iFs database.
 - For other team members, type in the role, name and contact name.
- Critical Dates – the critical dates for the project.
 - The "Project Duration" is for overall project start and end dates.
 - For other critical dates, type in the description, and start and end dates.
- Ship To – when filled in, this information is displayed in all specification sheets.
- Notes – These are project overview notes.
 - Any number of note records can be created.
 - Notes are ordered by the Sort number.
 - A distinct Title can be selected for each note. If the title you want to use is not in the lookup list, type in a new value and when prompted, confirm "Yes" to add it to the list.
 - The project notes are one-of-a-kind notes, and are not stored in the "Notes Library".



Items Library Detail screen

From the "Main Screen", Editors section under "Libraries" click the [Items] button.

- The "Items Library" is organized by "Item Class" and "Item Code".
 - There are nine, fixed "Item Classes".
 - Each item class has a fixed set of fields.
 - Use the tabs to view records in each Item Class.



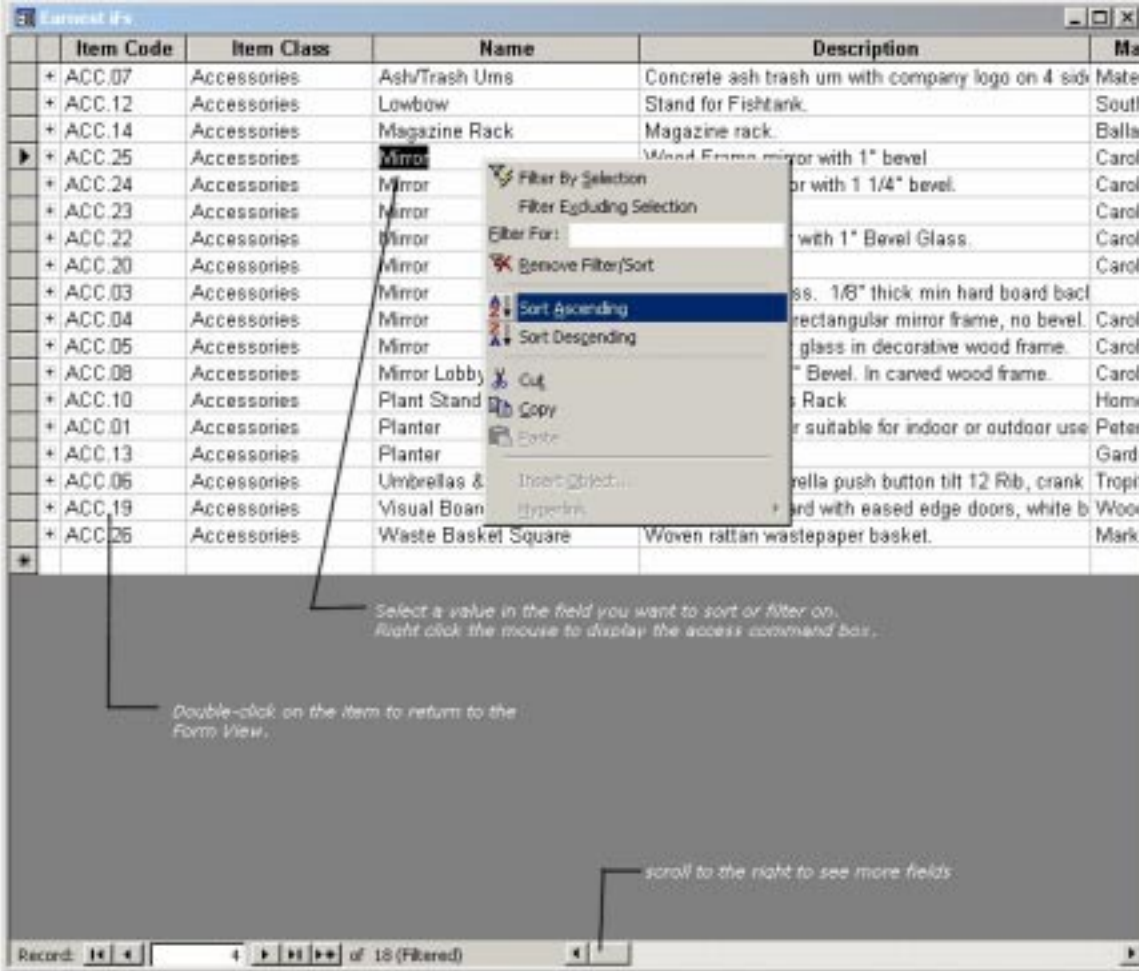
- Within an Item Class, the records are sorted alphabetically by "Item Code".
 - Item codes are user defined, and can be any combination of characters.
 - Item codes should be simple, but they must be unique. It is recommended that item codes have a prefix that corresponds with the Item Class
- There are several ways to move between individual records:



- Click the "Previous" or "Next" button

- Or click the datasheet view button 

- all records are shown in tabular (“Datasheet”) view.
- Right click to sort or filter.
- dbl-click to select one record and return to form view.



Select a value in the field you want to sort or filter on.
Right click the mouse to display the access command box.

Double-click on the item to return to the Form View.

scroll to the right to see more fields

Record: 14 of 18 (Filtered)

Item Code	Item Class	Name	Description	Ma
+ ACC.07	Accessories	Ash/Trash Urns	Concrete ash trash um with company logo on 4 sides	Mater
+ ACC.12	Accessories	Lowbow	Stand for Fishtank.	South
+ ACC.14	Accessories	Magazine Rack	Magazine rack.	Ballar
+ ACC.25	Accessories	Mirror	Wood Frame mirror with 1" bevel	Caroli
+ ACC.24	Accessories	Mirror	or with 1 1/4" bevel.	Caroli
+ ACC.23	Accessories	Mirror	with 1" Bevel Glass.	Caroli
+ ACC.22	Accessories	Mirror		Caroli
+ ACC.20	Accessories	Mirror		Caroli
+ ACC.03	Accessories	Mirror	ss. 1/8" thick min hard board back	
+ ACC.04	Accessories	Mirror	rectangular mirror frame, no bevel.	Caroli
+ ACC.05	Accessories	Mirror	glass in decorative wood frame.	Caroli
+ ACC.08	Accessories	Mirror Lobby	" Bevel. In carved wood frame.	Caroli
+ ACC.10	Accessories	Plant Stand	s Rack	Home
+ ACC.01	Accessories	Planter	r suitable for indoor or outdoor use	Peter
+ ACC.13	Accessories	Planter		Garde
+ ACC.06	Accessories	Umbrellas &	rella push button tilt 12 Rib, crank	Tropit
+ ACC.19	Accessories	Visual Board	ard with eased edge doors, white b	Wood
+ ACC.26	Accessories	Waste Basket Square	Woven rattan wastepaper basket.	Mark

- You can also move between records, in either Form view or Datasheet view by using the record navigation buttons at the bottom of the screen.

Earnest iFs - Items Library Detail	
Items Library Detail	
Accessories	Seating
Softgoods	Files and Shelving
Lighting	Equipment
Item Code	FIT.10
Item Class	Equipment
Name	Casegoods
Manufacturer	Files & Shelving
Model / number	Lighting
Finish / Color:	Panels & Components
Description	Seating
Special	Softgoods
Dimensions	Tables
	ool table with spruce billard c
	7'L x 50"W. Playing surface 36" x 72".

The Item class for an existing record can be changed by moving to the record and selecting another Item Class from the lookup list:

Working with images in the Items Library

Specifications in the Items Library can include an image, such as a diagram, photo, sketch, etc.

You may want to experiment with s as there that can be used for the images. The size of the image file is an important consideration if you wish to store the file in the database. If you prefer to use a format that gives you a high quality image files and compression factor will result in, and the image quality should be a consideration you wish to incorporate.

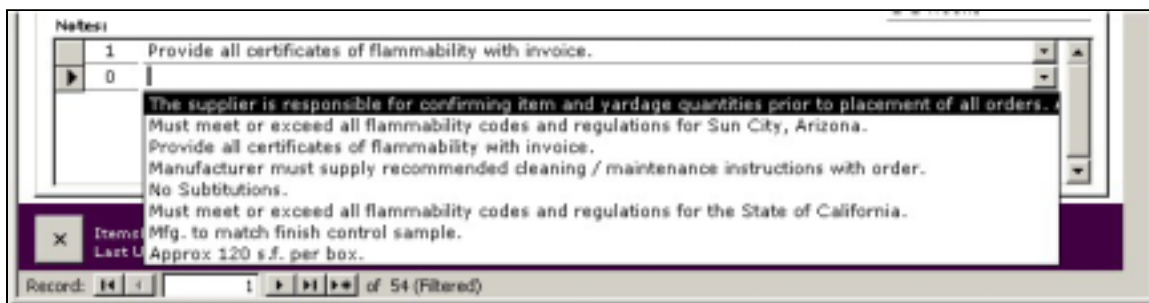
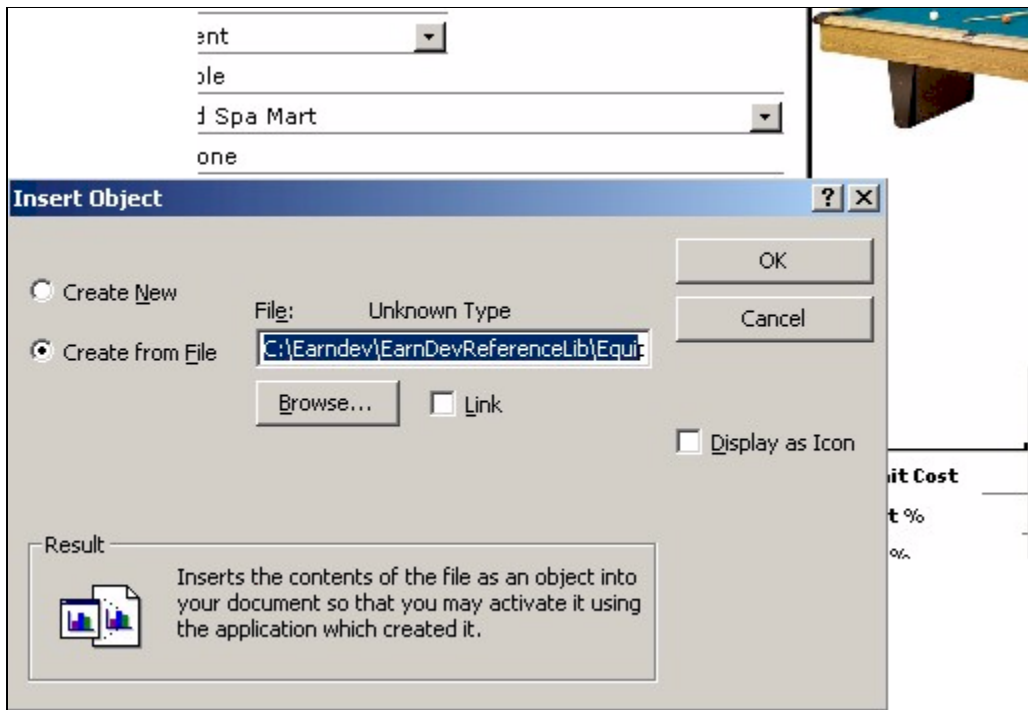
.jpg	25 KB
.gif	41 KB
.bmp	539 KB

- The image can be created with standard image composing software.
- The image can be copied and pasted from an online web page or CDROM catalog.
- The image can be scanned from a tearsheet, catalog or drawing.

The image can be in black and white, or color (Images will print out in color only if you use a color printer).

To insert an image:

- Right-click on the image box. Select [Insert Object]
- Browse to the image file you wish to insert.
- Click [OK].



The Notes Subform

The notes subform allows you to assign standardized notes to your specifications.

- Enter a sort number.
- Select a note from the pull-down list, or type in a new note.
- The notes can be edited in the “Notes Library” editor.

Pallet Library Screen

From the "Main Screen", Editors section under "Libraries" click the [Pallet] button.

- The "Pallet Library" is organized by "Item Class" and "Pallet Code".
 - There are four, fixed "Item Classes".
 - Each item class has a fixed set of fields.
 - Use the tabs to view records in each Item Class.
- There are several ways to move between individual records:



- Click the "Previous" or "Next" button



- Or click the datasheet view button

- all records are shown in tabular ("Datasheet") view.
- Right click to sort or filter.
- dbl-click to select one record and return to form view.
- You can also move between records, in either Form view or Datasheet view by using the record navigation buttons at the bottom of the screen.

The screenshot shows the 'Pallet Library' window in the Earnest iFs application. The window title is 'Earnest iFs'. At the top right, there are navigation buttons: a grid icon, left and right arrows, a green plus sign with an exclamation mark, and a close button (X). Below the title bar, there are four tabs: 'Upholstery', 'Carpet', 'Wall Coverings', and 'Flooring'. The 'Carpet' tab is selected. The main area is divided into two columns of fields. The left column contains fields for 'Pallet Code' (PT-01), 'Item Class' (Carpet), 'Manufacturer' (Bausman & Co.), 'Product Name' (Chelsea Suites), 'Product Number' (40904952), 'Color' (Antique Iris), 'Width' (12" Broadloom and Modular), 'Repeat' (18" (W) x 36" (L)), 'Content', 'Finishing', 'Flammability' (ASTM E-84 (Class A or 1), C), and 'Durability'. The right column contains fields for 'Backing' (Woven Synthetic), 'Texture' (Patterned Loop), 'Stitch Count' (10.2 Per Inch), 'Pitch / Rows', 'Pile Height' (.175 In.), 'Pile Weight' (28.0 Oz. Per Sq. Yard), 'Installation', 'Lead Time', 'Unit of Measure' (Sq. Yds.), 'Base Unit Cost' (\$35.00), 'Discount %' (0%), 'Markup %' (10%), and 'Adjusted Cost' (\$38.50). At the bottom, there is a 'Special Instructions' text area. A purple status bar at the bottom of the window displays 'PalletLibID: 93' and 'Last Update: Admin 5/2/2001 3:43:48 PM'. Below the status bar is a record navigation bar showing 'Record: 14' and 'of 13 (Filtered)'.

Upholstery	Carpet	Wall Coverings	Flooring
Pallet Code	PT-01	Backing	Woven Synthetic
Item Class	Carpet	Texture	Patterned Loop
Manufacturer	Bausman & Co.	Stitch Count	10.2 Per Inch
Product Name	Chelsea Suites	Pitch / Rows	
Product Number	40904952	Pile Height	.175 In.
Color	Antique Iris	Pile Weight	28.0 Oz. Per Sq. Yard
Width	12" Broadloom and Modular	Installation	
Repeat	18" (W) x 36" (L)	Lead Time	
Content		Unit of Measure	Sq. Yds.
Finishing		Base Unit Cost	\$35.00
Flammability	ASTM E-84 (Class A or 1), C	Discount %	0%
Durability		Markup %	10%
Special Instructions			
		Adjusted Cost	\$38.50

PalletLibID: 93
 Last Update: Admin 5/2/2001 3:43:48 PM
 Record: 14 of 13 (Filtered)

Pallet Library Screen – Carpet

From the "Main Screen", Editors section under "Libraries" click the [Pallet] button.

Click the tab for "Carpet"

Cartoonist 2's

Pallet Library

Upholstery	Carpet	Wall Coverings	Floor Coverings
Item Class	Wall Coverings		
Pallet Code	WC-01		
Manufacturer	Deepa Textiles, Inc.		
Product Name	American Texture Classics		
Product Number	DTCS02504	Durability	
Description	Textured vinyl wallcovering	Flammability	
Color	Sea Breeze	Installation	
Width	36"	Unit of Measure	Double Rolls
Repeat		Base Unit Cost	\$0.00
Construction		Discount %	0%
Content		Mark up %	0%
Backing	Water-based Adhesive	Adjusted Cost	\$0.00
Finishing		Est. Lead Time	
Notes	<input type="button" value="0"/>		

PalletLibID: 105
 Last Update: 2/18/2002 2:03:55 PM xxx

Record: of 7 (Filtered)

Pallet Library - Wall Coverings

From the "Main Screen", Editors section under "Libraries" click the [Pallet] button.

Click the tab for "Wall Coverings"

Ernest IFS

Pallet Library

Upholstery Carpet Wall Coverings **Flooring**

Pallet Code	97	Backing	Glued
Item Class	Floor Coverings	Texture	
Manufacturer	B & H Wholesale		
Product Name	Insignia Royale		
Product Number	lp3-01mas		
Color	Iris Maple Natural Strip		
Width	9.5"x47.5"x5/16"		
Repeat		Lead Time	
Content		Unit of Measure	Sq. Feet
Finishing	Laminate	Base Unit Cost	\$2.47
Flammability	ASTM E-84 (Class A or 1), C	Discount %	0%
Durability		Markup %	0%
		Adjusted Cost	\$2.47
Special Instructions	There are 18.8 square feet in one box of flooring. (46.50 per box.)		

PalletLibID: 97
Last Update: Admin 5/2/2001 2:12:26 PM

Record: 1 of 8 (Filtered)

Pallet Library – Flooring

From the "Main Screen", Editors section under "Libraries" click the [Pallet] button.

Click the tab for "Flooring"

Resources

Manufacturer

Company: Archives

Contact:

Address: 3333 Commercial Ave.

City: Northbrook

State: IL

Zip Code: 60062

Phone: 800-621-0827

FAX: 60062

Email:

Web Site:

Mfg Type: Palet Library

Notes:

Representative / Dealer

Company: Charles Hogan

Contact: Charles Hogan

Address: 4336 Chatay

City: Denver

State: CO

Zip Code: 80249

Phone: 303-576-0076

FAX: 708-205-1510

Email:

Website:

Notes:

MfgID: 1
RepID: 1
Last Update: 2/18/2002 sys

Record: 14 of 63

Resources screen

From the "Main Screen", Editors section under "Libraries" click the [Resources] button.

- In the Resources screen you can add or edit information about Manufacturers, and assign a Representative/Dealer.
- To add a Resource, click the [ADD] button.
- To move from one record to the next, use the [Previous] or [Next] buttons, or the record navigation controls at the bottom of the screen.
- To see the a list of manufacturers in a tabular layout, click the [Datasheet View] button.
 - To Sort or Filter the records, select the record and field, and right-click.
 - Dbl-Click to return to Form View.

Mfg Type	Company	Contact	
Items Library	Harpers		1500 W
Items Library	Hollywood By Kayline		
Items Library	Home Decorators Collection		8920 Pk
Items Library	Hon		3545 E
Pallet Library	Interface		P. O. Bx
Items Library	International Terra Cotta Inc.		690 N. I
Items Library	Jackson of Darville		Steinart
Items Library	LaCor		10451 F
Items Library	Living Design		47015 E
Items Library	Lockhart Collection		11975 F
Pallet Library	Loomsource		721 Old
Pallet Library	Lucia Cassa		501 Em
Pallet Library	Maharam		45 Rasi
Items Library	Mark David		508 Old
Items Library	Materials Inc.		PO Box
Items Library	Midmark Corp.		
Items Library	National Office Furniture Co.		1600 R
Items Library	Patcraft		
All Libraries	Peter Pepper Products		
Items Library	Pool and Spa Mart		
Pallet Library	Robert Allen		
Pallet Library	Scalamandre		
Items Library	Schafer Chair Co.		
Items Library	Schu Industries		
Items Library	Shelby Williams		
Items Library	Smith & Hawken		
Items Library	Southland		
All Libraries	Stadelman		

Record: 44 of 63

- Filter By Selection
- Filter Excluding Selection
- Other For:
- Reverse Filter/Sort
- Sort Ascending
- Sort Descending
- Out
- Copy
- Delete
- Insert Object...
- Hyperlink

To Edit information about the Representative / Dealer, double-click the "Company Name", or click the "Edit Reps" button.

Dealers / Representatives

Company: **Charles Hogan**

Contact: Charles Hogan

Address: 4336 Chateau

City: Denver

State: CO

Zip Code: 80249

Phone: 303-576-0076

FAX: 708-205-1510

Email:

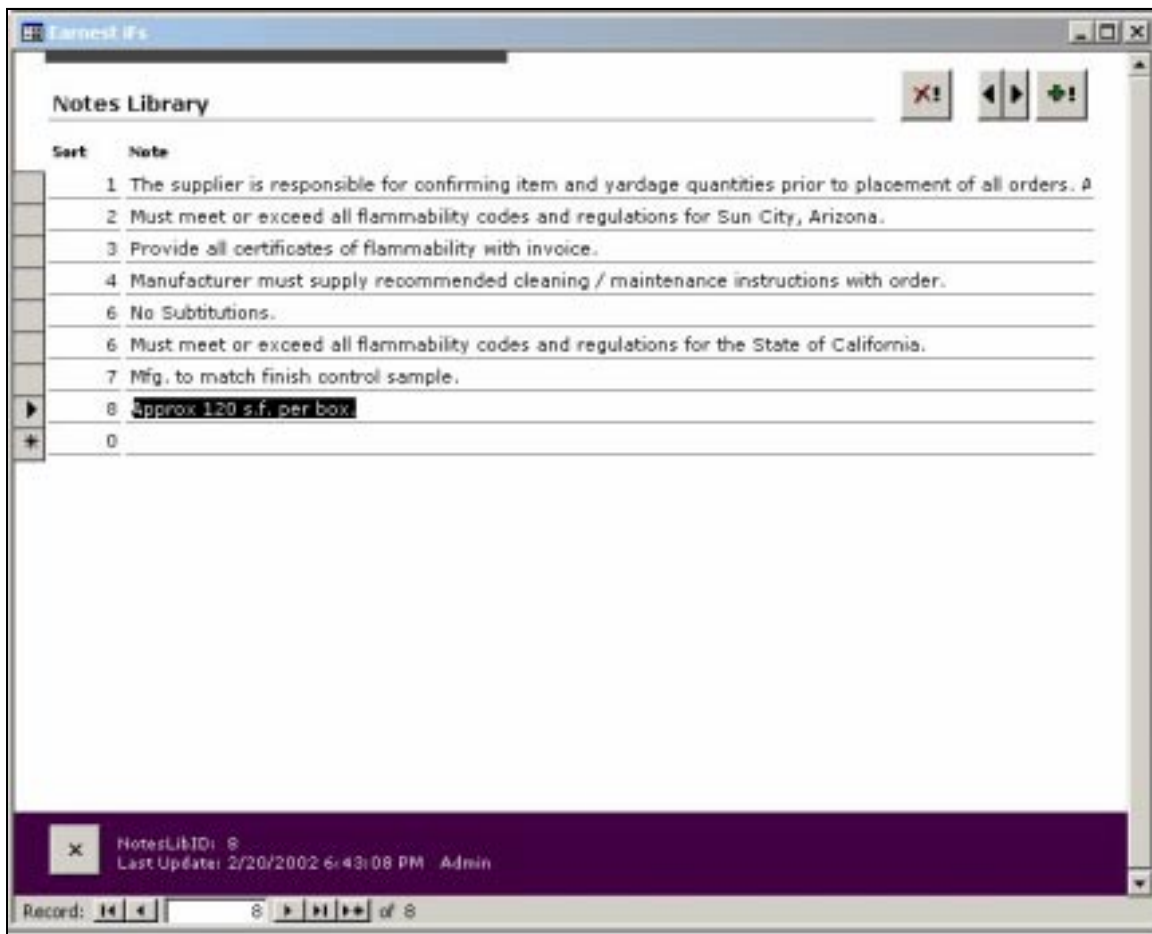
Web Site:

Notes:

RepID: 1
Last Update: 2/18/2002

Record: 44 of 60

Dealers / Representatives screen

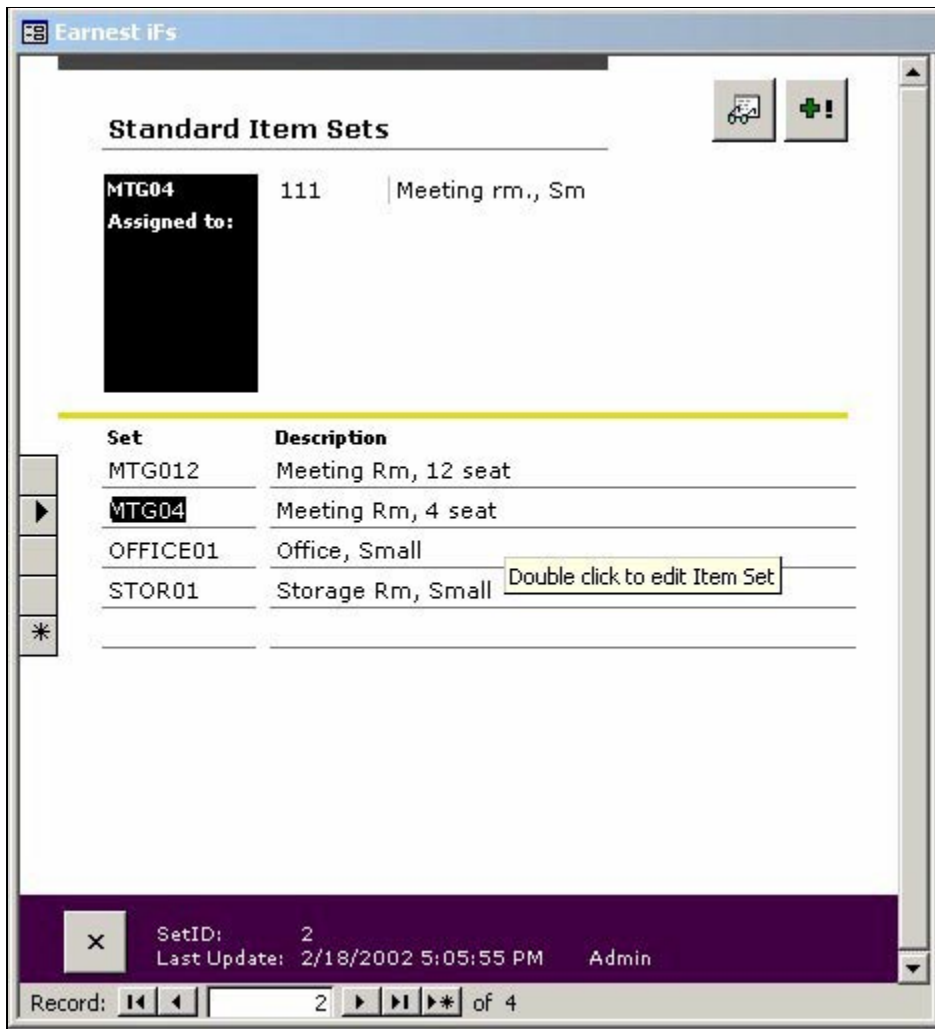


Notes Library Screen

Create standardized notes to be used on specifications.

The sort number determines what order the notes appear in the look-up.

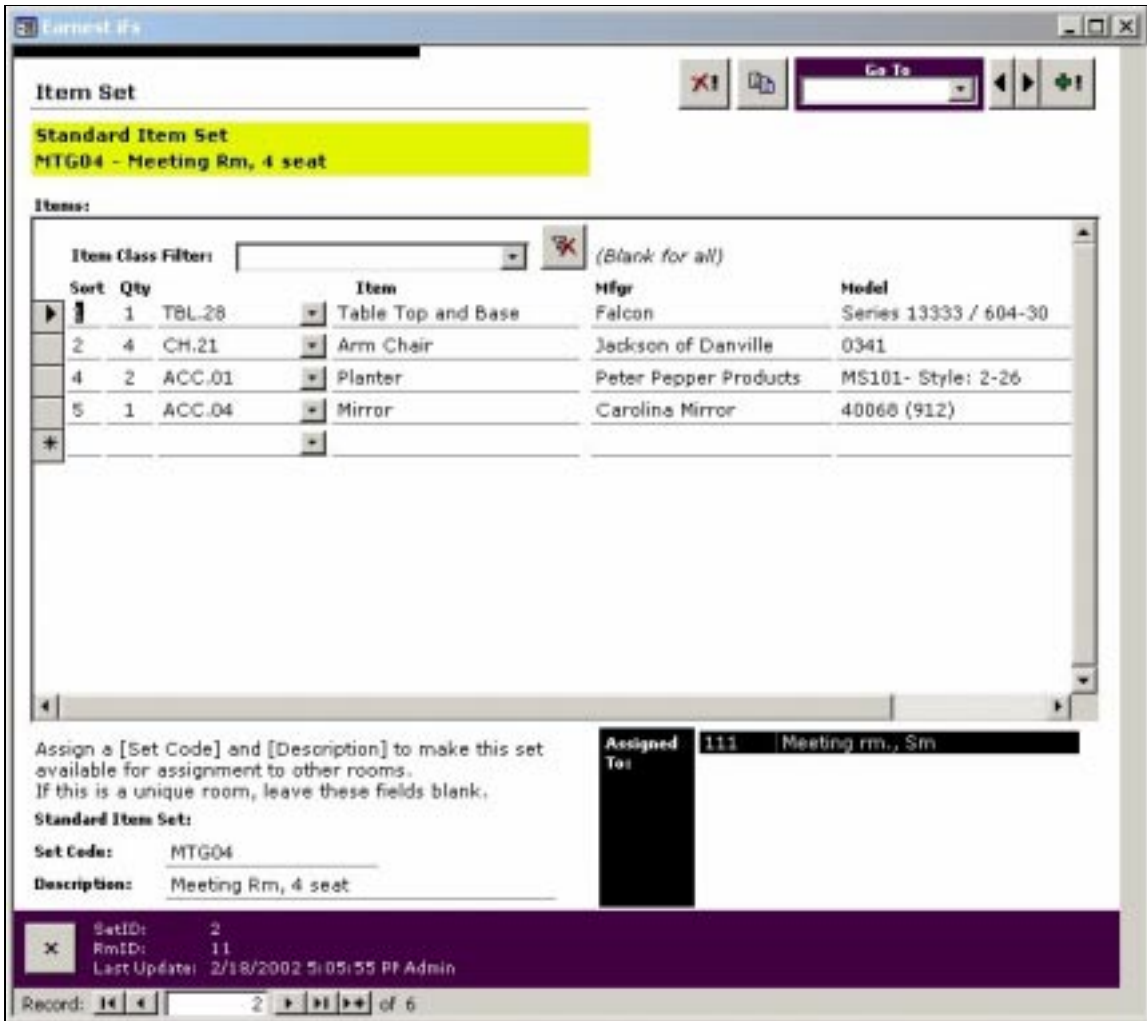
The text of the note can be revised at any time, and will be immediately reflected in any specifications that it has been assigned to.



Standard Item Sets screen

From the Main screen, Editors section, click the "Standard Item Sets" button.

- To add a Standard Item Set
 - Use the scroll bar at the right side of the screen to move to a new record at the bottom of the list, or Click the ADD button.
 - Enter a Set Code and Description
- To find a Standard Item Set
 - Use the scroll bar at the right side of the screen to move up or down in the records.
- To view or edit the "Item Set" details for a Room:
 - Select the record.
 - Click the [OPEN] button, or dbl-click on one of the records, to launch the "Item Set" Detail screen.



Item Set Editor screen

There are two ways to launch the Items Set Editor:

- From the "Standard Item Sets" screen.
- From the "Rooms" screen.

The yellow bar at the top left of the screen displays the active record.

- If it is Unique set, the room number is displayed
- If it is a Standard set, the code and name of the set are displayed.
 - The Set Code and Description will also be displayed at the bottom left of the screen. These can be edited in this screen.
 - If it is a Standard set, the "Assigned To" box will be displayed at the bottom right of the screen. This lists all rooms that have been assigned the set.

To move to another Set:

- Use the "GoTo" pull down box to select the desired set, or
- Use the record navigation buttons at the bottom of the screen.

To Filter the detail records on a specific Item Class:

Item Set

Standard Item Set
MTG04 - Meeting Rm, 4 seat

Items:

Item Class Filter:			(Blank)
Sort	Qty		Mfgr
1	1	TBL.28	Falcon
2	4	CH.21	Jackso
4	2	ACC.01	Peter f
5	1	ACC.04	Carolir

Accessories
Casegoods
Equipment
Files & Shelving
Lighting
Panels & Components
Seating
Softgoods

- Select the Item Class from the pull-down box. Records for only the selected Item Class will be displayed.
- Click the "Remove Filter" button to view all items assigned to the set.

To add an Item to the Set:

- Move to a new record at the bottom of the List
- Enter a sort number.
- Enter a quantity.
- Select an Item from the pull-down list, or type in a new Item Code.
 - The name, manufacturer and model will be displayed in the remaining fields.
- Repeat this process to add more items.

To Copy items from another Item Set:

- Click the "COPY" button located at the top of the screen
- The "Copy Set" screen will be displayed.



Copy

Copy Set Next >

Target room: **MTG04 - Meeting Rm, 4 seat**

Select Source to copy from:

List by Room Number

List by Set Code

RmNo	RmName	SetCode	SetDesc
103	East Room		
110	Meeting rm., Lg	MTG012	Meeting Rm, 12 seat
115	Paper goods storage	STOR01	Storage Rm, Small
313	Library		
401	Admin Office		

SetID: 2

- Check the appropriate box to sort the list by Room Number or Set Code
- Select the room or set that you wish to copy from.
- Click the "Next" button.
- The "Copy Confirm" screen will be displayed.

Item Copy Confirmation

Current

MTG04 - Meeting Rm., 4 seat

Code	Description	Qty	Manufacturer	Model
ACC.01	Fiberglass planter s	2	Peter Pepper Products	M5101- Style: 2-26
ACC.04	English Baroque rec	1	Carolina Mirror	40068 (912)
CH.21		4	Jackson of Danville	0341
TBL.28	Square laminate top	1	Falcon	Series 13333 / 604-30

Pending

110 - Meeting rm., Lg

Replace
 Merge

Commit

Code	Description	Qty	Manufacturer	Model
ACC.01	Fiberglass planter s	2	Peter Pepper Products	M5101- Style: 2-26
ACC.04	English Baroque rec	1	Carolina Mirror	40068 (912)
CG.08	Country French Tal	1	Antique Designs	514
CH.21		12	Jackson of Danville	0341
TBL.09	Scrolled metal acce	1	Mark David	M 125
TBL.27	Custom boat-shape	1	Woodsmiths	11312 / B 362

X

- The top section "Current" shows the items and quantities that are currently assigned to your Set.
- The bottom section "Pending" shows the items and quantities that are assigned to the set you are copying from.
- Click the appropriate button to either "Replace" or "Merge" the data.
 - Check "Replace" if you want to over-write your existing items data.
 - Check "Merge" if you want to add the new items your existing items data.
- Click the "Commit" button to complete the action.

To view or edit the detail of a individual Library Item:

- Dbl-click the "Item Code" to open the "Items Library Detail" editor.

Earnest IFS

Space Standards

Space Standard Code	Description	Default Item Set	Dimensions:	Sq. Ft.	Budget
ACV01	Activity Rm., 5 - 10		20' x 25'	500	\$1,000
ACV02	Family		15' x 20'	300	\$5,000
ADMIN	Administration rooms		20' x 20'	400	\$2,000
CCL01	Coat closet		4' x 5'	20	\$50
LIB01	Recreational/Academic Library		40' x 50'	2,000	\$2,000
STOR01	Storage		10' x 10'	100	\$100
TO1M	Mens Toilet		6' x 10'	60	\$500
TO1W	Women's Toilet		10' x 10'	100	\$500
*				0	\$0

ADMIN	Typical Admin Office
ELEVLOB	Typical Elevator Lobby
LR.01	Typical Liesure Room
RR.01	Restroom
STOR.01	Typical Storage Room

StdID: 7
 SetID: 34
 Last Update: Admin 5/2/2001 2:41:30 PM

Record: 14 of 8

Space Standards Screen

From the "Main Screen", Editors section under "Quantities", click the [Space Standards] button.

- Space standards typically correspond to a space requirements program created at an early stage of the project.
 - Each standard can be assigned a default Standard Item Set.
 - When a standard is assigned to a room, the default will be applied automatically.

Earnest IFS

Rooms

Go To: []

Room Number	Room Name	Dimensions	Sq. Ft. (Blank for Unique)	Item Set	Room Type	Space Std	Location
102	Lobby	20' x 25'	500		Public		Ground Fl
103	East Room	20' x 25'	500		Activity		Ground Fl
104	Day Room	15' x 22'	300		Activity		Ground Fl
105	Men's Toilet	6'-6" x 10'	66		Toilet		Ground Fl
106	Women's Toilet	10' x 10'	100		Toilet		Ground Fl
107	Reception	15' x 20'	300		Public		Ground Fl
110	Meeting rm., Lg	20' x 25'	0	MTG012	Activity	MTG.12	Ground Fl
111	Meeting rm., Sm	30x30	0	MTG04	Activity	MTG.01	Ground Fl
113	Vending	15' x 20'	300				
114	Storage	20' x 25'	500				
115	Paper goods storage	10' x 12'	120				
116	Food storage	10' x 10'	100		Storage		Ground Fl
312	J. W. Room	20' x 25'	500		Activity		3rd Fl
313	Library	40' x 50'	2,000		Activity		2nd Flr
401	Admin Office	10' x 15'	150			OFF.01	
*			0				

MTG012	Meeting Rm, 12 seat
MTG04	Meeting Rm, 4 seat
OFFICE01	Office, Small
STOR01	Storage Rm, Small

RmID: 11
 SetID: 2
 Last Update: 2/18/2002 2:47:34 PM Admin

Record: 14 of 15

Rooms screen

From the "Main Screen", Editors section under "Quantities", click the "Rooms" button.

- Rooms are organized by Room Number.
- If actual room numbers are not available, any sequence of unique numbers and/or characters can be used in the [room number] field.

If quantification is necessary, but it is not important to have individual room assignments, one "room" record can be created for the purpose of assigning item and/or finish quantities.

To add a new Room



- Click the [Add] button.
 - Enter the [Room No.] (accepts Alpha or Numeric values, must be unique), and the [Room Name].
- To find a Room:
 - Use the scroll bar at the right side of the screen to move up or down in the records.
 - OR
 - Use the [GoTo] combo box to find it, by typing in the room number, or by selecting from the list, and press the [Enter] key on your keyboard.

To assign a "Standard Item Set" to a Room:

- Select a value from the [Item Sets] combo box, or type in a new Item Set Code.

To assign a "Space Standard" to a Room:

- If a Space Standard is assigned to a room, the default Item Set from the Space Standard (if it has been set) will be applied automatically.

To view or edit the "Item Set" details for a Room:

- Select the Room record.
- Click the [OPEN] button, or dbl-click on one of the three left columns, to launch the "[Item Sets](#)" Detail screen.
- If the Room does not currently have an Item Set, a unique one will be created when the "Item Sets" Detail screen is launched.

Room Finishes Editor

Go To

Rooms List:		Dimensions	Sq. Ft.
102	Lobby	20' x 25'	500
103	East Room	20' x 25'	500
104	Day Room	15' x 22'	300
105	Men's Toilet	6'-6" x 10'	66
106	Women's Toilet	10' x 10'	100
107	Reception	15' x 20'	300
▶ 110	Meeting rm., Lg	20' x 25'	0
111	Meeting rm., Sm	30x30	0
113	Vending	15' x 20'	300
114	Storage	20' x 25'	500
115	Paper goods storage	10 x 12	120
116	Food storage	10' x10'	100

Filter: (Blank for all)

Finishes for Room 110:

Sort	Item	Qty	Remarks
1	CPT-02	30 Sq. Yds.	
▶ 2	F.001	100 Yds	Upholstered panels
*			

Record: 2 of 2

RmID: 10
Last Update: 2/18/2002 2:47:19 PM Admin

Record: 7 of 15

Room Finishes Editor screen

From the Main screen, in the Reports section, click the "Reports" button.

- Finishes from the Pallet Library can be assigned to rooms in order to generate quantities.
- The top section of the editor allows you to select a room.
- The bottom section allows you to assign the finish material and quantity to the room.
- The Filter allows you to display one class of finish at a time.


Reporting


Earnest #s

Reports

Sort	Title	Description
1	Project Information	Project overview.
2	Specification	Accessories Spec. Sheet
3	Specification	Casegoods Spec. Sheet
4	Specification	Equipment Spec. Sheet
5	Specification	Files and Storage Spec. Sheet
6	Specification	Lighting Spec. Sheet
7	Specification	Panels and Components Spec. Sheet
8	Specification	Seating Spec. Sheet
9	Specification	Softgoods Spec. Sheet
10	Specification	Tables Spec. Sheet
11	Specification	COM Uph. Materials Spec. Sheet
12	Specification	Carpet Spec. Sheet
13	Specification	Flooring Spec. Sheet
14	Specification	Wallcoverings Spec. Sheet
15	Quantification Report	Quantification & Room Assignment - Furnishings
16	Quantification Report	Quantification & Room Assignment - COM
17	Quantification Report	Quantification & Room Assignment - Finishes
18	Budget Summary	Budget Summary - Furnishings.
19	Budget Summary	Budget Summary - Pallet.

Selected: **Seating Spec. Sheet**

Report Date Format: Page number format: Edit Report List and Titles: 

Report Date: Page Number Prefix: Edit other Report settings: 

Use Today's Date: Start with Page Number:

Message stamp:

Reports Screen

From the Main screen, in the Reports section, click the "Reports" button.

To run a report:

- Select the report you want to run
- Adjust any report settings
- Click the PRINT PREVIEW button at the top right of the screen.
- The report filter screen will be launched.


To change other report settings:

- Click the "Edit other Report settings" button
- When you are satisfied with the report settings, close this screen to return to the Reports screen.

To change the order in which the Reports are listed, or to change the title of a report:

- Click the "Edit Report List" button.
- When you are satisfied with the changes to the reports list, close this screen to return to the Reports screen.

Earnest iFs

Report Filtering 

Specification
Seating Spec. Sheet

(Blank for "All")

Include: Assigned Items Only

Manufacturer:

Item:

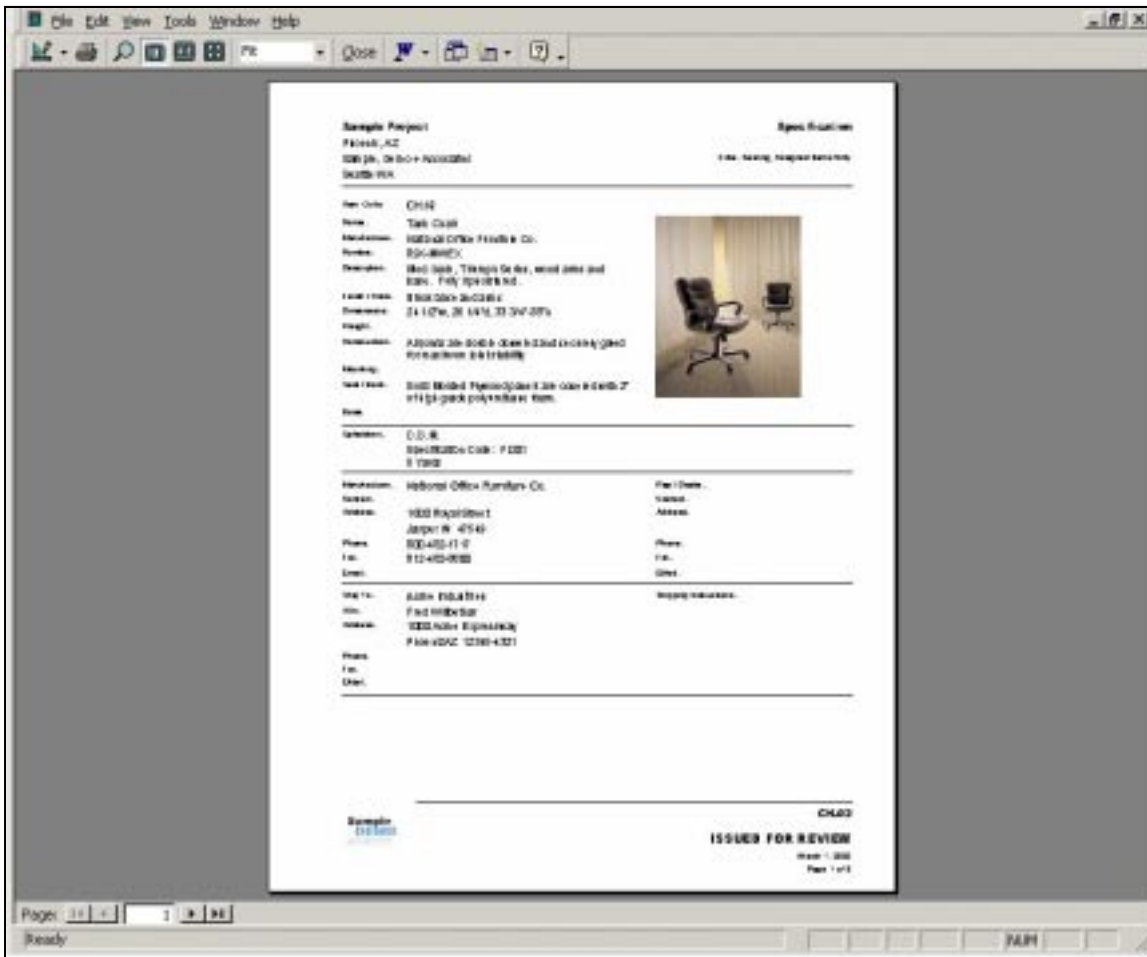
Filtering description: (displayed below the report title)
Filter: Seating, Assigned Items Only

Report Filtering screen

Most of the reports in iFs can be filtered on a set of criteria selected by the user when the report is run.

- The filtering screens and the criteria choices available vary slightly depending upon which report you are running.
- If filtering is not desired, leave all the criteria boxes blank.
- If you want to report only the items that have quantities, select "Assigned Items Only" from the box labeled "Include:"
- If you want to report only the items from a specific Manufacturer, select the name from the box labeled "Manufacturer:"
- If you want to report only a single item, select it from the box labeled "Item:"
- The "Filtering description" box will automatically reflect the criteria you have selected.
 - If you do not want to display this information in the report header, you can delete the text from the box by selecting it and pressing your [Delete] key, or type in the text you wish to have displayed.

When you are satisfied with the filtering selections click the "Print Preview" button at the top right of the screen to run the report.



Report Print Preview

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

To Print the report

- If you wish to select certain pages or a specific printer, from the menu bar at the top of the screen select "File", "Print", and choose the appropriate settings.
- If the default printer is appropriate, and you don't need to see the printer settings, click the [PRINT] button in the tool bar at the top of the screen.
- If you want to change the Report Settings prior to printing the report, cancel Print Preview by clicking the [Close] button at the top of the screen.

Ernest IFS

Settings

Unit of measure - Area: Sq. Ft. ▾

Decimal Places - Area: 0 ▾

Report Date Format: mmmm d, yyyy ▾

Report Date: 3/1/2002

Use Today's Date: 2/22/2002

Header / footer # 1: Sample Project

Header / footer # 2: Phoenix, AZ

Header / footer # 3: Sample, Demo + Associates

Header / footer # 4: Seattle WA

Message stamp: ISSUED FOR REVIEW ▾


Page number format: Page 1 of 2 ▾

Page number prefix: _____

Start with page number: 1

OLE Image files:
B/W or Color photo or graphic image.
Must be in .bmp format.
Size not larger than the object
frame (7/8" sq.).

OLE Image #1:



× Last Updated: 2/18/2002 6:40:24 Admin

Reports Settings Screen

From the "Main" screen, in the "Reporting" section, click the "Report Settings" button.

In this editor you can:

- Set the unit of measure for Area values, such as "SF", or "square feet" or "m2"
- Set the number of decimal places that are displayed for Area values
 - for sq. ft. this is typically 0, for square meters this is typically 1.
- Set the report date formatting
 - There are many formats to choose from in the look-up list, like "January 30, 2002", "30 Jan, 2002", "1/30/02", etc.
- Set the report date.
 - Check the box to use today's current date.
 - Un-check the box to enter a specific report date.
- Set the values for report headers and footers.
 - To exclude one or more of the header lines, leave those fields blank.
- Set a message stamp
 - There are many message stamps to choose from in the look-up list, like "DRAFT", "PRELIMINARY", "APPROVED BY _____".
 - If the message you wish to display is not already in the list, type in the new value and when prompted, confirm "Yes" and it will be added.
- Set the page numbering
 - Several number formats are available
 - A page number prefix can be set, like a section name or number.
 - Page numbering can begin with a value other than 1.
- Insert a company logo or other image file to be displayed in the reports. See "Working with Images" for more on this topic.
- When you are finished, close this screen to return to the Reports screen.

The screenshot shows a window titled 'Earnest IFS - Reports List Editor'. The main area is titled 'Reports List and Titles' and contains a table with the following data:

Sort	Report Title	Description / Remarks	Active
1	Project Information	Project overview.	<input checked="" type="checkbox"/>
2	Specification	Accessories Spec. Sheet	<input checked="" type="checkbox"/>
3	Specification	Casegoods Spec. Sheet	<input checked="" type="checkbox"/>
4	Specification	Equipment Spec. Sheet	<input checked="" type="checkbox"/>
5	Specification	Files and Storage Spec. Sheet	<input checked="" type="checkbox"/>
6	Specification	Lighting Spec. Sheet	<input checked="" type="checkbox"/>
7	Specification	Panels and Components Spec. Sheet	<input checked="" type="checkbox"/>
8	Specification	Seating Spec. Sheet	<input checked="" type="checkbox"/>
9	Specification	Softgoods Spec. Sheet	<input checked="" type="checkbox"/>
10	Specification	Tables Spec. Sheet	<input checked="" type="checkbox"/>
11	Specification	COM Uph. Materials Spec. Sheet	<input checked="" type="checkbox"/>
12	Specification	Carpet Spec. Sheet	<input checked="" type="checkbox"/>
13	Specification	Flooring Spec. Sheet	<input checked="" type="checkbox"/>
14	Specification	Wallcoverings Spec. Sheet	<input checked="" type="checkbox"/>
15	Quantification Report	Quantification & Room Assignment - Furnishings	<input checked="" type="checkbox"/>
16	Quantification Report	Quantification & Room Assignment - COM	<input checked="" type="checkbox"/>
17	Quantification Report	Quantification & Room Assignment - Finishes	<input checked="" type="checkbox"/>
18	Budget Summary	Budget Summary - Furnishings.	<input checked="" type="checkbox"/>
19	Budget Summary	Budget Summary - Pailet.	<input checked="" type="checkbox"/>
0			<input checked="" type="checkbox"/>

At the bottom of the window, there is a status bar showing: 'Record: 14 of 19'. A purple bar at the very bottom contains the text: 'RepID: 101', 'Last Update: 1/5/2001 2:32:34 PM', and '392'.

Reports List and Titles Screen

From the Main screen, Reporting section, click the button "Edit Report List"

In this editor, you can:

- Change the order that reports are listed.
- Customize the title of any of the reports.
- Change the title of the reports back to the system default titles.
- Change the "Active" status of a report
 - when the box is checked, the report will appear in the "reports list", when un-checked it will be hidden.

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