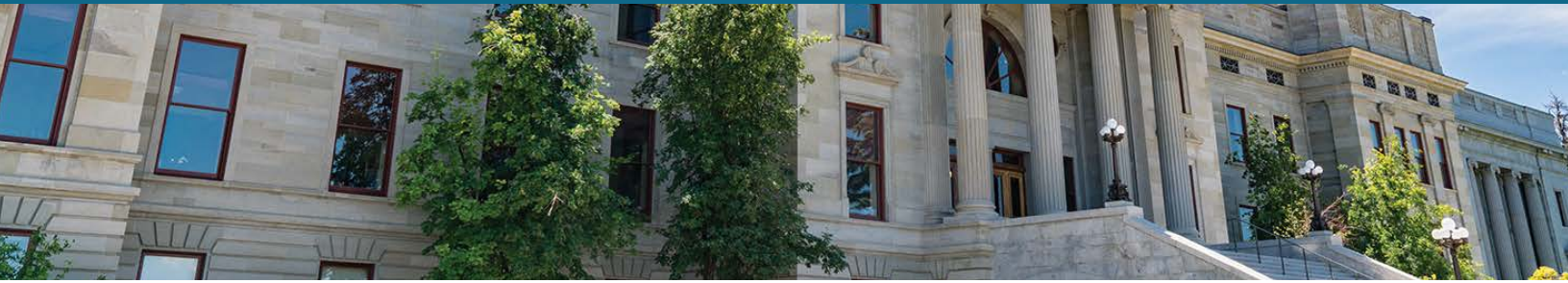


# Facilities Software Modules & Capabilities



## Modules & Capabilities by Product License

Contained within Engage, Locate, Operate, Perform, Analyze and Automate are specific functionalities known as licenses. Used in conjunction with the “Software & Services Catalog”, this document helps to breakdown each of the products’ licenses, modules, and their associated capabilities.

As you will see in the following pages, some products only have a handful of licenses and modules, as their functionality is very specific. However, Operate has by far the most licenses and modules, as it is the engine of the five products. New licenses and modules are currently being developed and existing users will be given the option of updating their versions as needed.

You can download the “Software & Services Catalog” anytime by visiting [FacilityForce.com](https://FacilityForce.com) and selecting one of our Product Pages.



Software & Services Catalog

## FacilityForce Family of Products

**ENGAGE™**

**SELF-SERVICE PORTAL FOR YOUR CUSTOMERS**

**LOCATE™**

**MAP-CENTRIC ASSET MANAGEMENT**

**OPERATE™**

**ENTERPRISE FACILITIES MANAGEMENT SYSTEM**

**PERFORM™**

**ROLE-BASED APPS FOR MOBILE WORK-FORCE**

**ANALYZE™**

**BUSINESS INTELLIGENCE & REPORTING**

**AUTOMATE™**

**TOOLS FOR STREAMLINING & INTERFACING**



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### Self-Service Portal for your Customers . . . . . Page 3

Engage is a family of self-service portal solutions that provide a user-friendly, fully-integrated means of connecting you with your customers to provide the highest level of facilities service.

Options:  Requests  Space  SSO



### Map-Centric Asset Management . . . . . Page 5

Locate enables map-centric asset management with the power of Esri's ArcGIS embedded in FacilityForce. Bring your data to life by displaying assets, work orders and more on interactive maps.



### Enterprise Facilities Management System . . . . . Page 6

FacilityForce Operate is the core family of integrated enterprise solutions and specialized modules used to holistically manage facilities and assets, and to maximize their value to your organization.

**Pillars:**

- Property & Assets (Core)
- Space
- Work
- Capital Improvement
- Energy & Utility Chargebacks

**Options:**

- Asset Reservations
- AssetSync
- COBie
- CAD-Base
- CAD-Planning
- CAD-Revit
- Estimating
- Assessment & Strategic Planning
- Hazardous Material
- Keys
- Lease
- SpaceSync
- SSO
- Sustainability
- Team Scheduler



### Role-Based Apps for Mobile Workforce . . . . . Page 17

Perform is a family of mobile applications that put the power of FacilityForce in the hands of your field personnel and technicians, making them more productive on-the-go, wherever they need to be.

Options:  Asset Management  Capital Improvement  Inventory  Material Receiving  
 Material Requests  Work



### Business Intelligence & Reporting . . . . . Page 22

Analyze is the business intelligence solution built into the FacilityForce platform, which makes valuable and actionable business insights available to stakeholders in your organization.



### Tools for Streamlining & Interfacing . . . . . Page 23

Automate is an optional add-on to the FacilityForce platform that provides for business process automation and standards-based integration with other key systems in your facilities' ecosystem.

Options:  Business Processes  Data Connectors

(Last Updated: 1/01/23)

## Engage™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Engage Requests</b>	<ul style="list-style-type: none"> <li>• Work Requests</li> <li>• Key Requests (with Operate Keys)</li> <li>• Capital Budget Requests (with Capital Improvement)</li> <li>• Misc. User Definable Requests</li> <li>• Additional Request Types (Coming in the Future)</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to use a drag-and-drop interface to create request forms for customers unique to the job being requested.</li> <li>2. Ability to hide/unhide questions and add skip patterns to request forms based upon user inputs.</li> <li>3. Ability to require funding if job requires it.</li> <li>4. Ability to workflow requests to one or many people.</li> <li>5. Ability to require additional questions based upon the step in the workflow.</li> <li>6. Ability to capture errors and alert admin if workflow stalls or the job can't be created.</li> <li>7. Ability to auto-generate jobs or capital projects in back-office solution routed to the proper supervisor for execution once the request has been approved and funded.</li> <li>8. Ability to auto-provision new users based upon multiple forms of authentication (local authentication for external to the organization, Single Sign-On for internal to the organization).</li> <li>9. Ability to communicate to requestor via a comment stream.</li> <li>10. Ability to use requests on any device (responsive design).</li> <li>11. Ability to customize notifications/emails sent to users.</li> <li>12. Ability to limit the types of requests users can submit based upon who they are (contractor, faculty, staff, student, employee).</li> <li>13. Ability to limit information they can choose from in the request (buildings, employees, etc.) based upon who they are (contractor, faculty, staff, student, employee).</li> </ol>

(Last Updated: 1/01/23)

## Engage™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Engage Space</b>	<ul style="list-style-type: none"> <li>View Space Information</li> <li>Space Visualization</li> <li>Configurable Space Surveys</li> </ul>	<ol style="list-style-type: none"> <li>Web-based property information application to share property and location information with stakeholders.</li> <li>Configurable property and location information screens.</li> <li>Search for rooms by occupancy, room type.</li> <li>Search for buildings by occupancy, building type.</li> <li>Integrated Google Maps to display interactive property markers.</li> <li>Display GIS layers on Google Maps.</li> <li>Integrated Autodesk Forge Viewer to display interactive floor plans (requires Forge)</li> <li>Filter Map by radius tool.</li> <li>SSO authentication and user provisioning.</li> <li>Role based filtering of property and location information.</li> <li>Configurable Space Survey templates to allow for surveying on defined room location metadata such as organizational occupancy, employee occupancy, usage, programs, grants and grant employees.</li> <li>Space survey generator to deploy 000s of space surveys automatically.</li> <li>Space survey administration console to manage progress of active surveys.</li> </ol>

(Last Updated: 1/01/23)

## *Locate™ Included Modules & Key Capabilities*

The following list represents the included modules, and associated capabilities per licenses.  
(\* Recently added licenses will be designated with an asterix.)

<i>License</i>	<i>Key Capabilities</i>
<b>Locate</b>	<ol style="list-style-type: none"><li>1. Compatible with Esri's industry leading GIS technology.</li><li>2. Ability to integrate with one or more GIS databases, for a potentially enterprise-wide view of facilities and assets.</li><li>3. Initially, the integration provides a one-way sync from Esri to FacilityForce.</li><li>4. Plans are to make this a bi-directional sync, where various mapped attributes can be updated from either system.</li><li>5. Ability to manage horizontal asset locations (geolocation) independent of the system's Region/Facility/Property/Location hierarchy.</li><li>6. Provides a map-centric / map-first interface as a starting point for actions such as: create work order, create inspection, etc.</li><li>7. Offers standard map capabilities such as exposing or hiding layers, zooming in and out, selecting one or more assets, etc.</li></ol>

*(Last Updated: 1/01/23)*

## Operate™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Operate Property &amp; Assets (Core)</b>	<ul style="list-style-type: none"> <li>• Asset Management</li> <li>• Contract Administration</li> <li>• Finance</li> <li>• Human Resources</li> <li>• Property</li> <li>• System Administration</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to perform bulk updates to locations within a building (ex: ownership, usages, status).</li> <li>2. Track deeds/easements within the system.</li> <li>3. Track parcels or tracts of land within the system.</li> <li>4. Be able to group sets of properties together in portfolios.</li> <li>5. Be able to define building attributes such as HVAC type, foundation type, building envelope, etc.</li> <li>6. Be able to define maintenance and flood zones and which buildings are in each zones.</li> <li>7. Be able to define a default shop and/or shop worker for each building based on classification of work.</li> <li>8. Be able to define which shops support which building.</li> <li>9. Be able to define default shops and/or technicians by building or zone.</li> </ol>
<b>Operate Space</b>	<ul style="list-style-type: none"> <li>• Space Management</li> <li>• System Administration</li> <li>• DataPort</li> </ul>	<ol style="list-style-type: none"> <li>1. Create and update floor and room data by integrating with CAD drawings.</li> <li>2. Ability to query by building, department, organization, or space type and highlight/shade spaces on the CAD drawing based on query in a web browser</li> <li>3. Display floor plans in Autodesk Forge Viewer.</li> <li>4. Allocate by percentage of organizational occupancy, employee occupancy, program code, grants, usage.</li> <li>5. Ability to survey spaces and push space updates based on survey results.</li> <li>6. Issue space survey by organization, property and principal investigator.</li> <li>7. Ability to plan moves for employees and assets.</li> <li>8. Ability to read in space survey data collected in an external system.</li> <li>9. Ability to quickly switch between CAD floorplans to compare data for space occupancy, ownership, etc.</li> </ol>

(Last Updated: 1/01/23)

## Operate™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Operate Work</b>	<ul style="list-style-type: none"> <li>• Work Management</li> <li>• Accounts Payable</li> <li>• Inventory</li> <li>• Preventive Maintenance</li> <li>• Project Management</li> <li>• Purchasing</li> <li>• Time and Attendance</li> <li>• System Administration</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to plan and schedule jobs before assigning to work control, taking into account different skill sets and capacities.</li> <li>2. Ability to see jobs in all phases of their lifecycle (backlog, planned, scheduled, started, stalled) by shop.</li> <li>3. Ability to create daily assignments of jobs per technician.</li> <li>4. Ability to see availability by shop in a graphical/ calendar type format.</li> <li>5. Ability to pre-define and generate time cards for staff with pre-defined or recurring jobs (ex: custodial, grounds crews).</li> <li>6. Track employee attendance and leave.</li> <li>7. Group requested purchases by vendor and generate a single purchase order to fulfill requirements for multiple jobs.</li> <li>8. Support purchases for both items/parts and services which can be tied to a work order.</li> <li>9. Ability to create physical inventory counts by bin range, part classification, or cycle code, and define how many bins to count in each set.</li> </ol>

(Last Updated: 1/01/23)

## Operate™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Operate Capital Improvement</b>	<ul style="list-style-type: none"> <li>• Accounts Payable</li> <li>• Bid Management</li> <li>• Capital Projects</li> <li>• Planning and Needs Analysis</li> <li>• Purchasing</li> <li>• Time and Attendance</li> <li>• System Administration</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to import/update schedule information from Microsoft Project.</li> <li>2. Ability to track retainage on construction contracts. Can update both default retainage percentage and actual retained invoice dollars after contract starts.</li> <li>3. Ability to create a program-level contracts which cover multiple projects within the application, but have expenses and commitments show up on individual projects.</li> <li>4. Ability to track planned, original, and active project budgets.</li> <li>5. Ability to define closeout checklists for budget line items.</li> <li>6. Ability to seamlessly charge operations and maintenance job expenses to capital project line items.</li> <li>7. Ability to create capital project commitments (including cost controls) for future operations and maintenance jobs.</li> <li>8. Ability to create project manager weekly time sheets able to bill hours to capital projects, operations and maintenance jobs, or leave codes.</li> <li>9. Ability to create requests, annual budget requests, and multi-year strategic plans for long-range budget planning.</li> <li>10. Ability to submit an allotment request for multiple projects and funding sources at once for workflow and approval.</li> <li>11. Ability to bulk transfer posted transactions from one funding source or account to another.</li> <li>12. Ability to track baseline, estimated, and actual start and finish dates for both project schedule tasks and budget line items.</li> <li>13. Ability to apply bid preferences to submitted bid packages based upon original or adjusted bid totals.</li> </ol>

(Last Updated: 1/01/23)

## *Operate™ Included Modules & Key Capabilities*

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Operate Energy and Utility Chargebacks</b>	<ul style="list-style-type: none"> <li>• Asset Management</li> <li>• Energy Management</li> <li>• Finance</li> <li>• System Administration</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to define billing periods and assign cost and usage to those billing periods regardless of the transaction date</li> <li>2. Ability to define tariff codes and track spending to tariff code detail.</li> <li>3. Ability to invoice the difference in usage between two sets of meters.</li> <li>4. Ability to define a location served separate from the physical location of the meter.</li> <li>5. Ability to divide usage across many locations.</li> <li>6. Ability to divide usage across many accounts within a location.</li> <li>7. Ability to divide usage and cost proportionally to the % of space owned by the organization with respect to another organization and automatically update the % when the ownership changes.</li> <li>8. Ability to integrate with the Operate Property &amp; Assets Module.</li> <li>9. Ability to integrate with the accounts in the Finance Module.</li> <li>10. Ability to add multiple taxes to a customer invoice in order to recover cost.</li> </ol>

(Last Updated: 1/01/23)

## *Operate™ Included Modules & Key Capabilities*

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

<i>License</i>	<i>Modules Included</i>	<i>Key Capabilities</i>
<b>Operate AssetSync</b>	<ul style="list-style-type: none"> <li>• AssetSync</li> <li>• DataPort</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to bulk load asset data from an Excel spreadsheet.</li> <li>2. Full review process with ability to make edits before approving asset updates.</li> <li>3. Ability to add assets to PM program via import/ approval process.</li> <li>4. Ability to add assets to Capital Projects via import/ approval process.</li> <li>5. Ability to relocate assets via import/approval process.</li> <li>6. Ability to build asset hierarchies (parent/child relationship) via import/approval process.</li> <li>7. Ability to create system-generated IDs for assets imported from spreadsheets.</li> <li>8. Ability to verify and approve changes made via the mobile application.</li> </ol>

*(Last Updated: 1/01/23)*

## *Operate™ Included Modules & Key Capabilities*

The following list represents the included modules, and associated capabilities per licenses.  
(\* Recently added licenses will be designated with an asterix.)

<i>License</i>	<i>Modules Included</i>	<i>Key Capabilities</i>
<b>Operate Asset Reservations</b>	<ul style="list-style-type: none"> <li>• Asset Rental</li> <li>• Motor Pool</li> <li>• Setup Options</li> </ul>	<ol style="list-style-type: none"> <li>1. Define different rental rates for different types of assets based on duration, percentage, meter readings, or fixed fees.</li> <li>2. Automatically default best combination of duration and/or fixed rates based on desired outcome (highest charge or lowest charge).</li> <li>3. Ability to reserve assets.</li> <li>4. Ability to record meter readings when assets are rented out and returned.</li> <li>5. Ability to see availability of assets before booking/reserving.</li> <li>6. Ability to charge asset rental fees to work orders.</li> <li>7. Define different rental rates for different types of vehicles based on duration, percentage, meter readings, or fixed fees.</li> <li>8. Automatically default best combination of duration and/or fixed rates based on desired outcome (highest charge or lowest charge).</li> <li>9. Ability to request and reserve vehicles.</li> <li>10. Ability to record meter readings when vehicles are rented out and returned.</li> <li>11. Ability to see availability of vehicles before booking/reserving.</li> <li>12. Ability to charge vehicle rental fees to work orders.</li> <li>13. Create and track vehicle leases.</li> <li>14. Automatic generation of vehicle lease invoices.</li> <li>15. Record vehicle specific attributes such as engine/transmission type, passenger capacity, fuel types/capacity, make, model, year, VIN, etc.</li> </ol>

*(Last Updated: 1/01/23)*

## Operate™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Operate CAD-Base, Planning and Revit</b>	<ul style="list-style-type: none"> <li>• CAD-Base</li> <li>• CAD-Planning</li> <li>• Revit</li> <li>• DataPort</li> </ul>	<ol style="list-style-type: none"> <li>1. Support an interface to AutoCAD that will create rooms in the system from a CAD drawing.</li> <li>2. CAD interface will update square footage for rooms based on the CAD drawing.</li> <li>3. Deleting rooms off the CAD drawing will inactivate these rooms in the system via the CAD interface.</li> <li>4. Support planning and stacking reports for the space inside AutoCAD.</li> <li>5. Be able to view a CAD drawing of floors and rooms inside the CMMS system.</li> <li>6. Be able to highlight or shade rooms on the CAD drawing based on location/space type, status, or occupying entities.</li> </ol>
<b>Operate COBie</b>	<ul style="list-style-type: none"> <li>• COBie Review</li> <li>• DataPort</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to load an Excel spreadsheet in the appropriate COBie format and create a new building.</li> <li>2. Ability to load an Excel spreadsheet in the appropriate COBie format and create new assets for the building.</li> </ol>
<b>Operate Estimating</b>	<ul style="list-style-type: none"> <li>• Estimating</li> <li>• Setup Options</li> <li>• RSMMeans (Optional)</li> </ul>	<ol style="list-style-type: none"> <li>1. Create line item estimates using RSMMeans price books.</li> <li>2. Track Job Order (JOC) contracts, with the ability to define coefficients per contract/contractor for price book localization.</li> <li>3. Ability to estimate real work and planned work.</li> <li>4. Supports a full review process on estimates before work proceeds.</li> <li>5. Support different estimate cost models, including bare cost, in-house, and overhead &amp; profit costs.</li> </ol>

(Last Updated: 1/01/23)

## Operate™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Operate Assessment &amp; Strategic Planning</b>	<ul style="list-style-type: none"> <li>• Condition Assessment</li> <li>• Planning and Needs Analysis</li> <li>• DataPort</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to import/update vendor provided life cycle models (RSMeans in particular) without the need for external interfaces.</li> <li>2. Ability to bulk apply life cycle model adjustments based upon vendor-provided markups, contingency, and inflation.</li> <li>3. Ability to export selected renewal and refurbishment records.</li> <li>4. Ability to import (create and update) renewal and refurbishment records without the need for an external interface.</li> <li>5. Ability to update asset assessment information in the field via a mobile solution while in offline mode.</li> <li>6. Ability to associate and track renewal and refurbishment records to both work requests and/or capital projects.</li> <li>7. Ability to adjust the physical life of an asset based upon climate zone.</li> <li>8. Ability to create an assessment execution plan for an individual property.</li> <li>9. Ability to create multi-year strategic plan for selected property portfolios.</li> <li>10. Software should prioritize renewal and refurbishment records for us based upon multiple factors including property rank, record priority, and days past due.</li> <li>11. Renewal and refurbishment records may be associated with project requests and budget requests for funding and execution.</li> </ol>

(Last Updated: 1/01/23)

## Operate™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Operate Hazardous Material</b>	<ul style="list-style-type: none"> <li>• Hazardous Material</li> <li>• Setup Options</li> </ul>	<ol style="list-style-type: none"> <li>1. Catalog and track building-based hazardous materials (ex: asbestos).</li> <li>2. Catalog and track container-based hazardous materials (ex: refrigerants).</li> <li>3. Track individual lots or containers of hazardous materials.</li> <li>4. Track release and return/recovery of hazardous materials.</li> <li>5. Track abatement or disposal of hazardous materials.</li> <li>6. Attach MSDS numbers and datasheets for hazardous materials.</li> <li>7. Classify hazardous materials by Type and Class.</li> <li>8. Rate condition of hazardous materials.</li> <li>9. Record user-defined attributes for hazardous materials.</li> </ol>
<b>Operate Keys</b>	<ul style="list-style-type: none"> <li>• Keys</li> <li>• Setup Options</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to define key types, lock types, core types, and key ring types.</li> <li>2. Ability to track individual keys and key rings.</li> <li>3. Ability to define access points and associated locks.</li> <li>4. Ability to define which locations, access points, locks and cores apply to each key.</li> <li>5. Ability to request keys.</li> <li>6. Ability to release keys and key rings to internal employees or external contractors.</li> <li>7. Tracking of key copies, including status of each (available, on ring, release, or lost).</li> <li>8. Ability to inactivate keys.</li> </ol>

(Last Updated: 1/01/23)

## Operate™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Operate Lease</b>	<ul style="list-style-type: none"> <li>Lease Management</li> <li>Setup Options</li> </ul>	<ol style="list-style-type: none"> <li>Create and track both payable and receivable leases.</li> <li>Create payment schedules for leases.</li> <li>Track lease amendments.</li> <li>Pre-generate lease invoices or payments based on frequency and date.</li> <li>Break out expenses such as base rent, OPEX, and taxes within the payment schedules.</li> <li>Ability to have different payment schedules with different amounts during the life of the lease.</li> <li>Ability to sublet a lease.</li> <li>Ability to lease a whole building or specific space within a building.</li> </ol>
<b>Operate DataPort</b>		<ol style="list-style-type: none"> <li>Simple, consistent engine to drive data imports and exports to/from Operate.</li> <li>Validation and error logging are built in.</li> <li>Supports template-based data transfer process.</li> </ol>
<b>Operate SpaceSync</b>	<ul style="list-style-type: none"> <li>SpaceSync</li> <li>DataPort</li> </ul>	<ol style="list-style-type: none"> <li>Ability to export and import space data in a standard spreadsheet format, including space occupancy, programs, and grants.</li> <li>Ability to define, export, and import “custom” data elements for spaces and occupancy.</li> <li>Ability to compare space data in system with that from an import file, and flag all additions or changes.</li> <li>Ability to approve or reject space changes en masse.</li> </ol>

(Last Updated: 1/01/23)

## Operate™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Operate SSO</b>	<ul style="list-style-type: none"> <li>• SSO</li> <li>• Setup Options</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to allow a user to log in with a single ID and password to any of associated software.</li> <li>2. Enjoy the benefits of Single Sign-On (SSO) including improved security compliance. Operate supports LDAP, Shibboleth and CAS (Central Authentication Service) out-of-the-box.</li> <li>3. Use your existing authentication system</li> </ol>
<b>Operate Sustainability</b>	<ul style="list-style-type: none"> <li>• Green and Sustainability</li> <li>• Setup Options</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to define and track “green initiatives”.</li> <li>2. Ability to record dates for certification, review, and re-certification of initiatives.</li> <li>3. Ability to tag green initiatives to work orders.</li> <li>4. Ability to classify and group green initiatives.</li> <li>5. Ability to track progress/status of green initiatives.</li> </ol>
<b>Operate Team Scheduler</b>	<ul style="list-style-type: none"> <li>• Team Scheduler</li> <li>• Setup Options</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to schedule resources by drag and drop.</li> <li>2. Ability to graphically view and create work assignments by day or week.</li> <li>3. Ability to graphically view and plan work out into the future.</li> <li>4. Ability to graphically view work by priority or job status.</li> </ol>

(Last Updated: 1/01/23)

## Perform™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Perform Asset Management</b>	<ul style="list-style-type: none"> <li>• Mobile Asset Management</li> <li>• Location Verification</li> <li>• Inspections</li> <li>• Meter Readings</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to manage assets via a mobile application without a current network connection to the CMMS (Offline usability)</li> <li>2. Ability to identify Assets using a barcode or QR code via the mobile application</li> <li>3. Ability to identify when basic asset information, such as replacement tag or image, is missing from the asset profile via an exception list and add the information via the mobile application</li> <li>4. Ability to perform asset inventories and verify assets are in the proper location or missing from that location via the mobile application</li> <li>5. Ability to relocate assets via the mobile application.</li> <li>6. Ability to generate and perform inspections, in the field, via the mobile application.</li> <li>7. Ability to capture inspection results, notes, photos, and automatically generate remedial actions via the mobile application.</li> <li>8. Ability to generate customer requests automatically from failed inspection lines via the mobile application.</li> <li>9. Ability to update the replacement parts list for an asset via the mobile application.</li> <li>10. Ability to create new assets via the mobile application.</li> <li>11. Ability to record utility or asset meter readings within a reading route via a mobile application.</li> <li>12. App is built with native iOS support.</li> </ol>

(Last Updated: 1/01/23)

## Perform™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Perform Capital Improvements</b>	<ul style="list-style-type: none"> <li>• Mobile Access to Capital Projects</li> <li>• Onsite Safety Inspections</li> <li>• Log Issues and Notes</li> <li>• Track Time</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to filter for projects by number or description using the mobile device.</li> <li>2. Ability to quickly filter projects based upon radius distance from the user (e.g., within 1 mile) using the mobile device.</li> <li>3. Ability to review project information, documents, and team contacts while in the field using the mobile device.</li> <li>4. Ability to create, review, and edit notes for a project while in the field using the mobile device.</li> <li>5. Ability to create, review, and edit project issues when in the field to include adding images, descriptions, notes, and cost implications.</li> <li>6. Ability to perform onsite safety inspections while in the field using the mobile device.</li> <li>7. Ability to capture inspection results, images, and remedial actions at the inspection line item level.</li> <li>8. Ability to workflow failed inspection line items to contractor for action and response.</li> <li>9. Ability to review and approve workflow items in the field using the mobile device. (Issues, Invoices, etc.).</li> <li>10. Ability for a project manager to track time spent on capital projects, operations and maintenance jobs, or leave time.</li> <li>11. App is built with native iOS support.</li> </ol>

(Last Updated: 1/01/23)

## *Perform™ Included Modules & Key Capabilities*

The following list represents the included modules, and associated capabilities per licenses.  
(\* Recently added licenses will be designated with an asterix.)

<i>License</i>	<i>Modules Included</i>	<i>Key Capabilities</i>
<b>Perform Inventory</b>	<ul style="list-style-type: none"><li>• Create Mobile Pick Tickets</li><li>• Release/Return Inventory</li><li>• Scan Barcodes/QR Codes</li><li>• Sign Electronically</li></ul>	<ol style="list-style-type: none"><li>1. Create and edit pick tickets using a mobile app.</li><li>2. Draw items from inventory and track what is unavailable using a mobile app.</li><li>3. Generate notifications for requestors when their items are ready for pickup.</li><li>4. Browse the warehouse for items using a mobile app.</li><li>5. Release items from inventory using QR codes to find the correct transaction via a mobile app.</li><li>6. Return items to inventory and credit the appropriate transaction by scanning the upc code of the item within a mobile app.</li><li>7. Sign for transactions electronically and attach the signature to the transaction from a mobile device.</li><li>8. Find and count inventory using the integrated camera on a mobile device.</li><li>9. Update part profiles and attach photos of parts using the mobile device.</li><li>10. Ability to manage inventory via the mobile application.</li><li>11. App is built with native iOS support.</li></ol>

*(Last Updated: 1/01/23)*

## Perform™ Included Modules & Key Capabilities

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License	Modules Included	Key Capabilities
<b>Perform Material Receiving</b>	<ul style="list-style-type: none"> <li>• View Orders and Verify Received Items</li> <li>• Reject Unsuitable Items</li> <li>• Disburse Items After Receipt</li> <li>• Scan Barcodes/QR Codes</li> <li>• Sign Electronically</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to view incoming orders by vendor using the mobile application.</li> <li>2. Ability to scan barcodes in order to track incoming packages via the mobile application.</li> <li>3. Ability to track and verify received items via the mobile application.</li> <li>4. Ability to reject unsuitable items and document discrepancies with images taken via the mobile application.</li> <li>5. Ability to disburse items instantly after receipt via the mobile application.</li> <li>6. Ability to scan a work order, phase, capital project, or warehouse in order to generate the appropriate disbursement via the mobile application.</li> <li>7. Ability to reverse disburse items via the mobile application.</li> <li>8. Ability to capture the electronic signature of the receiver via the mobile application.</li> <li>9. Ability to capture the electronic signature of the person picking up the items via the mobile application.</li> <li>10. Ability to generate an iOS notification to the requestor when items are received.</li> <li>11. App is built with native iOS support.</li> </ol>

(Last Updated: 1/01/23)

## Perform™ Included Modules & Key Capabilities

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License	Modules Included	Key Capabilities
<b>Perform Material Requests</b>	<ul style="list-style-type: none"> <li>Request Parts from Field</li> <li>Request Stock or Non-Stock Items</li> <li>Receive Mobile Notifications</li> <li>Scan Barcodes/QR Codes</li> </ul>	<ol style="list-style-type: none"> <li>Ability to submit receipts for parts purchased with a credit card via the mobile application.</li> <li>Ability to request non-stock parts via the mobile application.</li> <li>Ability to browse vendor catalogs via the mobile application.</li> <li>Ability to find parts using upc codes via the mobile application.</li> <li>Ability to request and purchase parts without a live network connection (offline) and sync the requests at a later time.</li> <li>Ability to view the status of prior requests via the mobile application.</li> <li>Ability to receive iOS notifications when ordered parts have been received or inventory parts are ready for pickup via the mobile application.</li> <li>Ability to receive iOS notifications when POs or PO invoices need approval via the mobile application.</li> <li>Ability to approve POs and PO invoices via the mobile application.</li> <li>Ability to request parts using QR code or barcode scanning via the mobile application.</li> <li>App is built with native iOS support.</li> </ol>

(Last Updated: 1/01/23)

## Perform™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Perform Work</b>	<ul style="list-style-type: none"> <li>• View and Perform Daily Assignments</li> <li>• Request Materials</li> <li>• Track Time Spent on Jobs</li> <li>• Locate Job Site on Map</li> </ul>	<ol style="list-style-type: none"> <li>1. Ability to view and perform daily assignments via the mobile application.</li> <li>2. Ability to sort the work queue by priority, status, and date via the mobile application.</li> <li>3. Ability to request materials via the mobile application.</li> <li>4. Ability to enter work hours or leave time via the mobile application.</li> <li>5. Ability to find work on a map via the mobile application.</li> <li>6. Ability to track time spent on a job with a timer via the mobile application.</li> <li>7. Ability to graphically view the status of phase checkpoints via the mobile application.</li> <li>8. Ability to track the usage of shop stock via the mobile application.</li> <li>9. Ability to receive an iOS notification when assigned to new work.</li> <li>10. Ability to view and add notes and documents relating to work being performed via the mobile application</li> <li>11. App is built with native iOS support.</li> </ol>

(Last Updated: 1/01/23)

## Analyze™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Key Capabilities
<p><b>Analyze</b></p>	<ol style="list-style-type: none"> <li>1. Ability to display data with integrated chart data visualizations.</li> <li>2. Pre-built standard metrics for user configurable reporting categories.</li> <li>3. Pre-built table reports for work management and asset management including asset maintenance costs.</li> <li>4. Pre-built reporting tables for work management, financial transaction and space analysis and reporting.</li> <li>5. Ability to create custom chart visualizations from database queries or from data tables and data views.</li> <li>6. Automatic metric and reporting data updates without the need for scheduling or a data warehouse.</li> <li>7. Authenticated data access to raw or aggregated database queries, data tables and data views using a REST API for advanced analytics.</li> <li>8. Support for display of ad hoc reports and dashboards published by third party tools.</li> <li>9. Ability to easily audition and change between data visualizations within the software product environment.</li> <li>10. Ability to filter custom chart visualizations using time period and aggregated results.</li> <li>11. Ability to share reports with software product user groups and non-users.</li> <li>12. Ability to manage shared report editing privileges of users.</li> <li>13. Ability to set and manage report default parameter values applied for user groups.</li> <li>14. Ability to print or download chart data or visualizations in multiple formats.</li> <li>15. Configurable, role-based metrics for Operations and Maintenance and Capital Projects costs.</li> <li>16. "Set-it-and-forget-it" configurable dashboards.</li> <li>17. Privilege-based sharing of metrics and reporting.</li> <li>18. Automatic metric and reporting data updates without the need to scheduling, or a data warehouse.</li> <li>19. Flexible data access and visualization using included REST API's.</li> </ol>
<p><b>Modules Included</b></p> <ul style="list-style-type: none"> <li>• Data Visualizations</li> <li>• Track Metrics</li> <li>• Custom Reports</li> <li>• Configurable Dashboards</li> </ul>	

(Last Updated: 1/01/23)

## Automate™ Included Modules & Key Capabilities

The following list represents the included modules, and associated capabilities per licenses. (\* Recently added licenses will be designated with an asterix.)

License	Modules Included	Key Capabilities
<b>Automate Engine (Core)</b>	<ul style="list-style-type: none"> <li>Automated Business Processes</li> <li>Standard Data Connectors</li> </ul>	<ol style="list-style-type: none"> <li>Configurable (no programming required) software product automation of interaction with business layer and automation engine using parameter settings on a user interface.</li> <li>Configurable automation script scheduling.</li> <li>Software product database synchronization batch runs with data validation, logging, status notifications, and searchable run history.</li> <li>Pre-built data synchronization automations for import of external system data with standard formatting, data validation, input file archiving and batch event logging.</li> <li>Pre-built data synchronization automations for export of software database hierarchy and transaction data to an external system with aggregation and standard export file formatting options.</li> <li>Pre-built business process automation scripts for triggering software product automation of business processes not requiring human interaction.</li> <li>Pre-built software automation code module library for accelerated and high reliability custom automation scripts using an abstraction layer.</li> <li>REST API for interacting with software business layer and automation engine.</li> </ol>

*(Refer to the “Business Processes Catalog” and the “Software & Services Catalog” for more information.)*

*(Last Updated: 1/01/23)*