Essentials Playbook

Contents

How it works - What are Essentials

Audience: internal

“Essentials” refers to a collection of features within the Cohesion core platform. These features are bundled together and purchased as the first tier of our product. Some features may or may not be used by the client, but all are available to them.

What Information Do We Need from Clients?

This section describes the information that is needed from clients to set up Essentials. This is intended for internal and external audiences.

Each functionality area includes: Required details needed from clients, Optional details needed from clients, and how to access the Template if one is available for compiling the details.

Below is a list of the Essentials functionality areas. Review each section and provide the needed details.

- Pre-Requisite: Building Towers/Wings
- Pre-Requisite: Building Floors
- Building Subspaces
- Building Spaces

Pre-Requisite: Building Towers/Wings

The Building Layout needs to be defined before any other information can be added. Towers/Wings define the general layout of the building. Many buildings have just one tower, or wing, but others may have multiple towers. These details must be provided in order to begin the building set up.

Client Details

Required Details from Client	Description
Towel/Wing Name	Name of the Tower/Wing

Optional Details from Client	Description
Towel/Wing Description	Brief description of the tower/wing

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Tower-Wing

Instructions: Add a row for each Tower/Wing in the building

Pre-Requisite: Building Floors

The Building Layout needs to be defined before any other information can be added. This includes the number of floors in each Tower/Wing. These details must be provided in order to begin the building set up.

Client Details

Required Details from Client	Description
Towel/Wing Name	Name of the Tower/Wing where the floor exists
Floor Code	Code to identify floor
Floor Name	Name of the floor

Optional Details from Client	Description
Floor Description	Brief description of the floor

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Floors tab

Instructions: Add a row for each Floor in the building

Building Subspaces

Subspaces are part of the overall building model. These are smaller areas within a Space. In order to set up Spaces, the Subspaces need to be available, so Subspaces are defined first.

Client Details

Required Details from Client	Description
Floor	Floor where the subspace exists
Subspace Code	Unique code for the subspace. If a map of the building exists that includes subspace codes, provide those codes.
Subspace Name	Name for the subspace. The Subspace Name should be letters and numbers only
Subspace Description	Short description of the subspace

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Subspaces tab

Instructions: Add a row for each Subspace in the building

Building Spaces

Spaces are part of the overall building model. A list of all Spaces in the building should be provided. There are a couple of ways to gather Space details:

a. Client provides a list or map of the building Spaces.

b. Identify building Spaces from other data that is provided (for example, Tenant Companies or Amenities).

   Defining Spaces as Companies and Amenities are detailed could be a good starting point, then all that would remain is to define the Spaces that are not associated with other areas of the building.

   Jump to: Tenant Companies. Jump to: Amenity Reservations

Client Details

Required Details from Client	Description
Type	Tenant Suite (within a tenant's office) or Building Space (another space within a building)
Floor	Floor where the space exists
Space Code	Unique code for the space. If a map of the building exists that includes space codes, provide those codes.
Space Name	Name for the space. The Space Name should be letters and numbers only.
Subspace(s)	All of the subspaces that are in this space (to map the subspaces to this space)
Space Description	Short description of the space

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Spaces tab

Instructions: Add a row for each Space in the building

Building Roles

Building Roles define the permissions for different types of users in the system. The specific Roles that a building uses can vary, but there are a few general levels of Role permissions to consider, such as Builder Manager, Tenant Company Manager, Tenant Employee, and Security Staff.

To complete the building roles set up, there two important details needed from clients:

- List of all building roles
- Module permissions for each role

Sample Building Roles

Below are a few examples of Building Roles.

- Building Manager - Has full access to all features within the building (Can view all info, add, edit, delete users, set up amenities, update pricing, etc.)
- Security - Has view access to most capabilities, but likely doesn't have ability to set up things like book amenities, make parking assignments, define building roles, etc.
- Office Manager/Tenant Manager - Has ability to use features in Cohesion related to their office, but cannot view or make adjustment to other aspects of the building. Example - may be able to provide bike room access to their company employees but not for users at another company.
- Employee - Has the ability to use Cohesion features for matters relevant to only their user and their company (making a service request to turn up the heat in their space, booking an amenity, applying for their own bike room access, viewing building events, etc.).

Modules and Permissions

NOTE: The following permissions should be enabled for all building roles.

- Notification Setting
- Building
- Amenities

Jump to module: Role Notification Setting Building Parking Vendor Management Service Request Documents Company Building Setup User Amenity Visit Building Security

Role		
Permission	**Description**	**Feature Options**
Main Slider	Grants access to the **Roles** tab (Building Details > Roles) where role permissions are managed. This Main Slider should only be enabled for Building Admin or specific Building staff roles. NOTE: When the Main Slider is enabled for a role, at least one sub-permission must be enabled for the Roles tab to display.	Enable/Disable

Role		
Permission	**Description**	**Feature Options**
	NOTE: Building Setup must also be enabled for any role that will have access to this Roles tab.	
Can view roles?	Grants View permissions for complete role list at Building Details > Roles. Also enables roles list when setting permissions for a new menu item (Building Details > Configurations > Menu).	Enable/Disable
Can delete role?	Grants ability to delete an existing role.	Enable/Disable
Can create/edit role?	Grants ability to create roles, rename current roles, and edit permissions for roles.	Enable/Disable

Notification Setting		
Permission	**Description**	**Feature Options**
Main Slider	Adds Communications module to the Navigation menu. NOTE: Should be Enabled for all roles.	Enable/Disable
Can respond on behalf of management to messages from users via a chat feature?	Can receive and respond to a chat messages sent by users from Communications > Contract Management. This should only be enabled for Building Admin or specific Building staff roles.	Enable/Disable
Can manage mass notification?	Grants ability to send a mass notification in Communications > Mass Notifications > Add Notification.	Enable/Disable
Can manage notification setting?	Controls access to the Notifications tab in Building Details > Configurations. The Notifications tab includes Role notification settings, chat	Enable/Disable

Notification Setting		
Permission	**Description**	**Feature Options**
	auto-reply text, and the Building Signature in mass notifications.	
Can send messages to management via a chat feature?	Grants ability to send a chat message to Building Management via Communications > Contract Management.	Enable/Disable

Building		
Permission	**Description**	**Feature Options**
Main Slider	Adds the Information module in the Navigation menu. Should be on for all roles.	Enable/Disable
Can manage building info?	Can edit the Building Information tab in Building Details > Building Information. NOTE: Building Setup and Building Setup > Can manage building setup? must also be enabled for any role with this permission enabled.	Enable/Disable
Can manage building floor?	This can be disabled for all users. Floors are managed at the System Admin level.	Enable/Disable
Can manage building spaces?	Grants ability Add, Import, and Edit Subspaces located at Building Details > Building Model > Subspace. NOTE: Building Setup must also be enabled for any role with this permission enabled.	Enable/Disable
Can manage building tower/wing?	This can be disabled for all users. Towers/Wings are managed at the System Admin level.	Enable/Disable
Can manage building tenant suite?	Grants ability Add, Import, and Edit Spaces located at Building Details > Building Model > Space.	Enable/Disable

Building		
Permission	**Description**	**Feature Options**
	NOTE: Building Setup must also be enabled for any role with this permission enabled.	
Can manage building shortcut menu?	Grants access to manage the module carousel on the mobile app home screen in Building Details > Configurations > Mobile Home Carousel. Requires Building Setup is enabled.	Enable/Disable
Can manage building events?	Grants access to create an event for the building under Calendar > Create Calendar Item.	Enable/Disable

Parking		
Permission	**Description**	**Feature Options**
Main Slider	Enables the Parking module in the Navigation menu. NOTE: When enabled, at least one sub-permission needs to be enabled as well.	Enable/Disable
Can assign/unassign Reserved Parking to Users?	Grants access to **Reserved Parking** tab in Parking > Assign where reserved spots can be assigned.	No Yes - My company Yes - All companies
Can add/edit/delete Building Model Parking?	Grants access to Building Details > Building Model > Parking. NOTE: Building Setup must also be enabled for any role with this permission enabled.	Enable/Disable
Can assign/unassign Parking to Companies?	Grants access to **Parking** tab and ability to manage company parking spots when editing a company in Building Details > Tenant Companies. NOTE: Requires Company permissions **Can view companies?** and **Can edit company?**	Enable/Disable

Parking

Permission	Description	Feature Options
	NOTE: Building Setup must also be enabled for any role with this permission enabled.	
Can request Bike Room access?	Enables Role to request Bike Room access in Parking > Bike Room > Access tab.	Enable/Disable
Can manage Bike Room access?	Enables Role to manage Bike Room user access in Parking > Bike Room > Users. Also grants access to manage Bike Room settings in Building Details > Building Model > Bike Room. NOTE: Building Setup must also be enabled for any role with this permission enabled.	Enable/Disable
Can assign/unassign Unreserved Parking to Users?	Grants access to Unreserved Parking tab in Parking > Assign where unreserved spots can be assigned.	No Yes - My parking only Yes – On behalf of my company Yes - On behalf of all companies
Can purchase/unsubscribe Reserved Parking?	Grants access to Reserved tab in Parking > Purchase where reserved spots can be purchased.	No Yes - My parking only Yes – On behalf of my company Yes - On behalf of all companies
Can purchase/unsubscribe Unreserved Parking?	Grants access to Unreserved tab Parking > Purchase where unreserved spots can be purchased.	No Yes - My parking only Yes – On behalf of my company Yes - On behalf of all companies

Vendor Management

Permission	Description	Feature Options
Main Slider	Grants access to the Vendor Management module in the Navigation menu.	Enable/Disable
Can submit vendor requests, add new vendors, and upload COIs for those vendors?	Grants access to vendor request form at Vendor Management > Request. Also grants access to view request details from the Activity Log.	Enable/Disable

Vendor Management		
Permission	**Description**	**Feature Options**
Can view Activity Log of vendor requests?	Grants access to Activity Log tab to view request activity.	No Yes – My company Yes - All companies
Can check-in vendors upon arrival and grant them clearances?	Grants role ability to check-in an approved vendor in the Activity Log (Vendor Management > Activity Log). NOTE: Security Check-In must also be enabled for Vendor Management (in Building Details > Configurations > Vendor Management > Enable Security Check-In = Yes).	Enable/Disable
Can view vendor list?	Grants access to vendor list at Vendor Management > Vendors. NOTE: The Vendor list only displays when "Can submit vendor requests, add new vendors, and upload COIs for those vendors?" is enabled.	No Yes – Approved Vendors Yes - All Vendors
Can approve vendors and vendor requests?	Grants access to view and change status in Status column on the Vendors tab and Activity Log tab. Overrides "Can view Activity Log of vendor requests."	Enable/Disable

Service Request		
Permission	**Description**	**Feature Options**
Main Slider	Grants access to the Service Requests module in the Navigation menu. When enabled, a Role can view the list of service requests and comment on any of them.	Enable/Disable
Can add service request types marked advanced?	Grants role access to advanced service requests types added during service request set up.	Enable/Disable
Can view service requests created by?	Controls which service requests a Role can view.	No Yes - My service requests

Service Request		
Permission	**Description**	**Feature Options**
	No effect on ability to view service requests - this is granted by main slider.	Yes - My company's service requests Yes - All companies' service requests
Can add service requests?	Grants access to the service request form located at Service Requests > Create Request.	No Yes - My service requests Yes - My company's service requests Yes - All companies' service requests
Can add service requests for space occupied by?	Controls scope of service request abilities.	No Yes - My Company's Space Yes - All building spaces
Can schedule future service requests?	Grants access to View and Edit the "Expected Service Date" field when viewing and creating service requests.	Enable/Disable
Can update a service request, change the status, and assign request tasks to Users?	Controls the ability to edit existing service requests and assign them to users.	No Yes - My service requests Yes - My company's service requests Yes - All companies' service requests
Can cancel/delete service requests?	Controls access to delete existing service requests.	No Yes - My service requests Yes - My company's service requests Yes - All companies' service requests
Can update service request billing fields?	Grants access to add and edit billing details in service requests.	Enable/Disable

Documents		
Permission	**Description**	**Feature Options**
Main Slider	Grants access to the **Documents** module in the Navigation menu.	Enable/Disable
Can manage documents and folders, as well as permissions?	Grants access to Upload, Delete, and Restrict (by Role) folders and documents.	Enable/Disable

Documents		
Permission	**Description**	**Feature Options**
	NOTE: Should be reserved for Building Managers and Tenant Managers.	

Company		
Permission	**Description**	**Feature Options**
Main Slider	Grants access to **Tenant Companies** under Building Details in the Navigation menu. NOTE: Building Setup must also be enabled for any role with this permission enabled.	Enable/Disable
Can delete company?	Controls access to delete a company.	No Yes – My company Yes - All companies
Can create company?	Grants access to create a company.	Enable/Disable
Can view companies?	Controls access to viewing tenant companies. NOTE: All roles should have at least **Yes – My Company** enabled.	No Yes – My company Yes - All companies
Can edit company?	Controls access to editing companies.	No Yes – My company Yes - All companies
Can associate user roles to company?	Grants access to adjust which Role new users are assigned when created for a company.	Enable/Disable

Building Setup		
Permission	**Description**	**Feature Options**
Main Slider	Grants access to the **Building Details**, **Building Model**, **Integrations**, and **Configurations** options under Settings in the Navigation menu.	Enable/Disable

Building Setup		
Permission	**Description**	**Feature Options**
	NOTE: Should be reserved for Building Managers and other Admin staff.	
Can manage building setup?	Grants ability to edit Building Details > Building Model options. NOTE: Should be reserved for Building Managers and other Admin staff.	Enable/Disable
Can manage integrations?	Grants ability to edit Building Details > Integrations options. NOTE: Should be reserved for Building Managers and other Admin staff.	Enable/Disable

User		
Permission	**Description**	**Feature Options**
Main Slider	Grants access to the Users module in the Navigation menu. NOTE: Slider will grant access to a blank area if no sub permissions are granted.	Enable/Disable
Can edit users?	Controls access to editing a user.	No Yes - My company's users Yes - All companies' users
Can add users?	Controls access to adding a user.	No Yes – My company's users Yes - All companies' users
Can view users?	Controls access to viewing users. NOTE: All roles should have at least **Yes – Myself Only** enabled.	No Yes - Myself only Yes - My company's users Yes - All companies' users
Can delete users?	Controls access to delete a user.	No Yes - Myself only Yes - My company's users Yes - All companies' users

Amenity		
Permission	**Description**	**Feature Options**
Main Slider	Grants access to the **Amenities** module in the Navigation menu. NOTE: If this main slider is Enabled, then all of the settings below should be enabled as well.	Enable/Disable
Can view amenity calendar?	Grants access to see the Calendar view of amenity bookings (includes all bookings made).	Enable/Disable
Can view reservations?	Controls access to view existing bookings made through the system. NOTE: All roles should have at least **Yes - My reservations only** enabled.	No Yes - My reservations only Yes - My company's reservations Yes - All companies' reservations
Can cancel reservations?	Controls access to cancel submitted bookings (does not delete the booking).	No Yes - My reservations only Yes - My company's reservations Yes - All companies' reservations
Can delete reservations?	Grants access to remove an entire submitted booking.	Enable/Disable
Can cancel reservation with overwrite?	Grants access to adjust the price of an amenity at the time of approval/denial. When disabled, prices cannot be adjusted by the staff at the time of approval/denial/cancellation.	Enable/Disable
Can add reservations?	Controls access to book a reservable amenity.	No Yes - For myself only Yes - On behalf of my company Yes - On behalf of all companies
Can receive and approve/reject amenity reservation requests?	Grants access to approve/decline reservation requests.	Enable/Disable
Can edit reservations?	Controls access to change the info on existing bookings.	No Yes - My reservations only Yes - My company's reservations Yes - All companies' reservations
Can view Building Amenities?	Should be enabled for all roles if amenities are enabled for the building.	Enable/Disable

Visit		
Permission	**Description**	**Feature Options**
Main Slider	Grants access to the **Visitors** module in the Navigation menu.	Enable/Disable
Can add/edit/delete visits and visitors?	Controls access to Add, Edit, and Delete visits and visitors.	No Yes - My visits / visitors only Yes - On behalf of my company Yes - On behalf of all companies
Can Add Watchlist Entries?	Controls access to Add watchlist entries when Watchlist is accessed from the **Visitor Management** tab.	No Yes - My Company Yes - All Companies
Can manual check-in visitors?	Controls access to check-in a visitor from Visitors > Visitors. NOTE: "Can check-in visitors?" is also required to enable visitor check-in.	No Yes - My visitors only Yes - My company's visitors Yes - All companies' visitors
Can check-in visitors?	Controls access to check-in a visitor from Visitors > Visitors. NOTE: "Can manual check-in visitors?" is also required to enable visitor check-in.	No Yes - My visitors only Yes – My company's visitors Yes - All companies' visitors
Can view visitors?	Controls access to view the list of visitors at Visitors > Visitors.	No Yes - My visitors only Yes – My company's visitors Yes - All companies' visitors
Can view visits?	Controls access to view the list of visits at Visitors > Visits.	No Yes - My visits only Yes - My company's visits Yes - All companies' visits
Can Modify/Remove Watchlist Entries?	Controls access to Edit and Remove watchlist entries when Watchlist is accessed from the **Visitor Management** tab.	No Yes - My Company Yes - All Companies
Can View Watchlist Entries?	Controls access to View watchlist entries when Watchlist is accessed from the **Visitor Management** tab.	No Yes - My Company Yes - All Companies
Can Receive Watchlist Notifications?	Controls if a role receives an email and in-app notification when an individual is added to the watchlist.	Enable/Disable

Building Security		
Permission	**Description**	**Feature Options**
Main Slider	Grants access to clearance and credential functionality. Typically, this should be enabled for all roles.	Enable/Disable
Mobile keycard is added to user's home screen?	Controls if the mobile keycard is added to the mobile app home screen.	Enable/Disable
Can revoke digital credential?	Grants ability to delete a digital credential from a user account (Users > Edit User).	Enable/Disable
Can assign clearance to company?	Grants ability to assign clearance to a company in Tenant Companies > [Company] > Access Control. NOTE: Options still semi-present if not enabled but will not allow changes.	Enable/Disable
Can download digital credential?	Grants access to use mobile keycard. This should be enabled for all roles that will use a mobile keycard.	Enable/Disable

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Roles tab

Instructions: The Roles tab lists the features and functionality available with Essentials. Each building role should be added in a new column and the functionality permissions should be defined for each role. The role names in the template are placeholders that can be retained or changed, and additional columns can be added so that all of the required roles are included.

- Add a column for each building role you want created in the system and type the name for each role at the top of each column.

  NOTE: To copy another role as a starting point, select the column heading and copy the column (Ctrl+C) and then insert the new column wherever you want it

[Right-click > Insert Copied Cells] The new column is inserted to the left of where you insert it.

- For each feature, review the functionality and select the permissions that each role should have.

Notification Permissions

Notifications sent to users, and how they are sent to users, is controlled by Building Role. Review the notification types and identify:

a. Which notifications a Role should receive

b. How the Role should be notified

c. Can the Role edit their default notifications settings?

Notification permissions can be edited any time by Building Management in Building Details > Configurations > Notifications.

Module	Mass
Main Slider	Controls if mass notifications are enabled for this role
Available Event Notifications	• Mass notification - Event • Mass notification - Emergency • Mass notification – Advertisement • Mass notification – Announcement
How should this role receive notifications for the event(s)?	• Mobile • Text Message • E-mail • VoiceCall
Recommended for	Building staff, Tenant Manager, Tenant employee

Module	User
Main Slider	Controls if user notifications are enabled for this role
Available Event Notifications	• New user is added
How should this role receive notifications for the event(s)?	• Mobile • Text Message • E-mail

Recommended for	Building staff, Tenant Manager

Module	Role
Main Slider	Controls if role-related notifications are enabled for this role
Available Event Notifications	• Role is edited • New role is created
How should this role receive notifications for the event(s)?	• Mobile • Text Message • E-mail
Recommended for	Building staff

Module	Visit
Main Slider	Controls if visit notifications are enabled for this role
Available Event Notifications	• Visit is edited • Visitor has checked in • New visit is created using on behalf option
How should this role receive notifications for the event(s)?	• Mobile • Text Message • E-mail
Recommended for	Building staff, Tenant Manager, Tenant employee

Module	Invitation
Main Slider	Controls if invitation notifications are enabled for this role. This is only for the invitation motivation newly added users received; there is not an Invitation module is not available in the app, this is NOTE: This must be enabled for all roles.
Available Event Notifications	• Welcome, new user
How should this role receive notifications for the event(s)?	• E-mail

Recommended for	Required for all roles

Module	Company
Main Slider	Controls if tenant company notifications are enabled for this role
Available Event Notifications	• Company details modified • New company is created
How should this role receive notifications for the event(s)?	• Mobile • Text Message • E-mail
Recommended for	Unless a role requires a notification about new tenant companies or existing tenant company changes, leave this off for all roles.

Module	Booking
Main Slider	Controls if booking notifications are enabled for this role
Available Event Notifications	• Amenity Booking Approval Required (+) • New amenity booking is created (+) • Amenity Booking Approved (++) • Amenity Booking is edited or status changed (+) • Amenity Booking Declined (++)
How should this role receive notifications for the event(s)?	• Mobile • Text Message • E-mail
Recommended for	+ Enable for roles responsible for reviewing approving bookings ++ Enable for Tenants roles for notifications about their bookings

Module	Parking
Main Slider	Controls if parking notifications are enabled for this role
Available Event Notifications	• Parking Space is unassigned from User • Payment for your Parking Spot has been processed

	• Parking Space is unsubscribed by User • Parking Space is unassigned from Company • Parking Space is purchased by User • Parking Space is assigned to User
How should this role receive notifications for the event(s)?	• Mobile • Text Message • E-mail
Recommended for	Enable notifications for role(s) that manage parking

Module	Service Request
Main Slider	Controls if service request notifications are enabled for this role
Available Event Notifications	• Service Request - Estimate Changed (+*) • Service Request - Status Changed (++) • Service Request - New request assigned (+) • Service Request - New request created (+) • Service Request - Comment Added (++) • Service Request - Status Changed (Payment Initial) (+*)
How should this role receive notifications for the event(s)?	• Mobile • Text Message • E-mail
Recommended for	+ Enable for Building Engineering staff if native Service Request module (* when used with billing) ++ Enable for Tenant

Module	Bike Room
Main Slider	Controls if bike room notifications are enabled for this role
Available Event Notifications	• Bike Room Access granted – User • Bike Room Access granted – Management
How should this role receive notifications for the event(s)?	• E-mail
Recommended for	Building staff

Module	Geofence
Main Slider	Controls if geofence notifications are enabled for this role
Available Event Notifications	• Welcome to the building • You are leaving the building
How should this role receive notifications for the event(s)?	• Mobile
Recommended for	Tenant Manager, Tenant employee

Module	Vendor Management
Main Slider	Controls if vendor notifications are enabled for this role
Available Event Notifications	• Vendor Request Approval / Decline / Check-In Status (++) • COI Upload (+) • COI Expire Alert (+) • Vendor Request Creation (++) • Vendor Approval / Reject (+)
How should this role receive notifications for the event(s)?	• Mobile • Text Message • E-mail
Recommended for	+ Building staff ++ Building staff who approve/deny requests

Module	Indoor Air Quality
Main Slider	Controls if IAQ notifications are enabled for this role
Available Event Notifications	• Indoor Air Quality – Moderate • Indoor Air Quality – Critical
How should this role receive notifications for the event(s)?	• Mobile • Text Message • E-mail
Recommended for	Building staff

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Role Notifications tab

Instructions: The Role Notifications tab lists the modules and the event notifications that are available for each module. The Role column should be edited to include all of the roles defined on the Roles tab.

- Edit the **Role** column to include all of the roles defined on the Roles tab.

1. NOTE: To add an additional row for another role, copy another row as a starting point. Select the entire row and copy it (Ctrl+C) and then insert the new row wherever you want it (Right-click > Insert Copied Cells) The new row is inserted above the insertion point.

- For each module, review the **Notification Event Details** that are available and then edit the **Notification Types** that each role should receive. By default, all Notification Types are listed for each role, so delete any you do not want to include.
- Specify if the Notification Types should be editable by the role.

Tenant Companies

Provide a list of tenant companies in the building. After a company is created in the system, Company Details can be edited to specify the Space(s) each company occupies. If each company's Space information is provided, it can be entered as part of the Essentials set up. Otherwise Company Space(s) can be entered later by Building Management.

Client Details

Required Details from Client	Description
Company Name	Full name of the company

Optional Details from Client	Description
Show in Building Info	Specify if this company should be listed in in the Information module

Company Role Assignment	If available, list the Building Roles that users assigned to this Company will be able to hold
Company Logo	Provide a 240px X 240px image of the company logo
Spaces	Include a list of the Space[s] the company occupies

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Tenant Companies tab

Instructions: Complete a row for each company in the building

Users

Provide the list of users to be uploaded into the system. Typically, one bulk upload of users is performed by Cohesions just before the building launch date.

Users can be added and edited by Building Management in the Users module.

Client Details

Required Details from Client	Description
First Name	User first name
Last Name	User last name
Email Address	User's company email address
Building Role	User's Building Role
Company	User's company
Clearance[s]	Floor[s] user has access to
Home Office	Is this building the user's main office?

Optional Details from Client	Description
Middle Name	User middle name
Phone Number	Office phone number
Badge Number	Security badge number

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Users tab

Instructions: Add a row for each user in the building

Visitor Management (native)

Visitor Management functionality is built in to Cohesion Essentials. Clients may use this native Visitor Management or may already have a Visitor Management system they will integrate with.

For clients that are using native Visitor Management, specify that manual check-in should be enabled. For clients that are integrating with another Visitor Management system, this process is handled outside of this Essentials set up.

Client Details

Required Details from Client	Description
Enable manual check-in	Specify if native Visitor Management should be enabled in Cohesion, or if Cohesion will integrate with another Visitor Management system.

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Visitors tab

Instructions: Specify if native Visitor Management should be enabled.

Vehicle Parking

For buildings that have parking spots available for purchase or that can be assigned, details about these spots should be provided. If a parking garage map is available, please provide this to Cohesion so it can be used as a reference to set up parking.

Client Details

Required Details from Client	Description
# of reserved parking spots	Total number of reserved/numbered parking spots
# of unreserved parking spots	Total number of unreserved/unnumbered parking spots

Optional Details from Client	Description
Spot Code	This is defined internally by Cohesion
Floor	Specify the parking floor where spots exist.
Purchase Type	Specify if the spot(s) is Assigned or Monthly Purchase. Assigned spots are assigned to a tenant company so they can provide it to someone in their company. Monthly Purchase are available to tenant users for monthly purchase.
Monthly Rate	If Purchase Type is Monthly Purchase, then define the monthly cost for the spot(s).
Width	Size of the spot
Attributes	Attributes that describe the parking spot(s) E.g. Compact, Handicap, etc.
Update Access Control Clearance	Clearances that are associated with this parking spot

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Parking tab

Instructions: Complete the requested details and provide a garage map.

Bike Parking

If bike parking is available in the building, provide details for Bike Room set up.

Client Details

Required Details from Client	Description
Max. Number of Bike Room users	What is the maximum number of spots available in the Bike Room?
Payment Required?	Is payment required for Bike Room? If so, identify which: Credit Card, Invoice, ACH.
Purchase Frequency & Amount	Identify purchase frequencies that are available and the amount for each (Unlimited, One Day, Monthly, Quarterly, Annual)
Terms & Conditions	Define Terms and Conditions and Acknowledgement statement, and if users are required to agree to them.

Optional Details from Client	Description
Clearance	Clearance required for Bike Room

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Bike Parking tab

Instructions: Complete the requested details.

Amenity Reservations

Amenities that are available in the building should be described so that tenants are aware of all that the building has to offer.

For reservable amenities, such as conference rooms and meeting spaces, more details are required.

Client Details

Required Details from Client	Description
Amenity Name	Name of the amenity
Amenity image	Provide an image to display for the amenity. File format: jpg or png Size: 1100px X 1100px
Amenity teaser text	Summary text to display under the amenity image. 250 characters max.
Reservable?	Whether or not this amenity can be reserved by tenants. If so, also complete Required Details for Reservable Amenities.

Optional Details from Client	Description
Space(s) associated with amenity	Define that building Space(s) the amenity occupies
Amenity Description	2,000 character max.
Links	Provide the amenity URL, if available.

Required Details for Reservable Amenities	Description
Requires approval to book?	Does the amenity require approval to book?
Available Layouts	Name Capacity Setup Cost Layout Image (optional)
Is payment required to reserve amenity?	If so, which are accepted? Invoice, Credit Card, ACH.

Required Details for Reservable Amenities	Description
Will the reservation structure use hourly increments or fixed time blocks?	Hourly: tenants define the Start and End time for the reservation. Amenities can be booked in 30-minute increments. Fixed Time Blocks: Tenants select a block of time for their reservation using a predefined start and end time.
Define the hours of operation for the amenity	Define the operation details for the amenity. If payment is required, also define the cost and the acceptable payment forms (currency, credits)

Optional Details Reservable Amenities	Description
Terms and Conditions	Information about amenity usage for users to review or agree to
Amenity Information	General information on an amenity that will be displayed during the reservation process. For example, what is included in the reservation.
Available Equipment	List any equipment that is available for this amenity
Amenity Code (if mobile code booking will be used)	4-digit code to use for mobile booking

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Amenities tab

Instructions: Complete the requested details.

Mass Communications

Mass Communications can be sent to users to inform them about events, promotions, and to communicate during an emergency. Notifications can be created from scratch at any time, but it is also helpful to use templates to quickly send a message.

Provide details about any mass notification templates to be created.

Notification templates can be added and edited by Building Management at any time in the Communications module. Banner and logo images can be added or edited by Building Management in Configuration > Building Signature.

Client Details

Required Details from Client	Description
Notification Title	Title for the notification
Category	Advertisement, Announcement, Emergency, or Event.
Message	Enter the text for the message you want to send. This should be structured like an email.
Company	Send to all companies or a sub-set? If sub-set, specify which.

Optional Details from Client	Description
Clearance	Clearance required for Bike Room
Banner image	Provide banner image for notification messages Image size: 1024px X 185px
Logo image	Provide logo image for notification messages Image size: 240px X 240px

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Notifications tab

Instructions:

- Review the sample notifications to include only those entries you want added to your system.
- Add any additional notifications that you want in the system.

Vendor Management

If there are approved vendors to be added into the Cohesion system, provide details to populate the Vendor Management module.

These details can also be completed by Building Management at any time in Configurations > Vendor Management.

Client Details

Required Details from Client	Description
Introduction Text	Appears on the vendor request screen.
Detail Options	Used to briefly describe the vendor visit. Some sample details are below: • Contractor Work • Contractor Delivery • Single-Trip Delivery • Multi-Trip Delivery • Move-In/Move-Out
Vendors Category Options	Briefly describe what the types of vendors needed for the building. Examples of options used in systems are below: • Contractor • Painting Services • Movers • Plant/Landscaping Services • Caterer
Enable Security Check-In	Should a Check-In option be available in the Vendor Management module? When enabled, only users in a Building Role(s) with the correct permissions can check-in an approved vendor in the system.

Optional Details from Client	Description

Documents	Provide any vendor instructions or a sample COI PDF

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Vendor Mgmt tab

Instructions: Complete the requested details.

Building Information

The Information module provides users with details about the building. Please provide the details to be displayed in the Information module.

These details can also be completed by Building Management at any time in Building Details > Building Information.

Client Details

Required Details from Client	Description
Building logo	Building logo image size 240px X 240px.
Building Name	Name of the building

Optional Details from Client	Description
Address	Street, City, State, Zip Code
Banner image and images	Provide images of the building to display in the Information module Size 1024px X 1024px
Property Information	Details about the property such as management hours, certifications, etc.
Building Description	Description of the building and its location.
Hours of operation	Building Hours Start Time, Building Hours End Time, Business Hours Start Time, Business Hours End Time
Neighborhood Description	Neighborhood description, Building Use description
Building features	Keywords that describe the features of the building

Leasing Contacts	Name, Email, Phone, Photo (240px X 240px)
Wi-Fi Details	Provide the network name and password, if desired.
Current Building Tenants	List other companies in the building
News + Social	Title, Type, Link
Transit UR	This is provided by Cohesion

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Building Info tab

Instructions: Complete the requested details.

Service Requests (native)

Service Request functionality is built in to the Cohesion system.

There are Standard Types and Sub Types that can be added to the system, which clients can customize to remove any that are not needed. Clients can also define their own Types and Sub Types to be added to the system.

Client Details

Required Details from Client	Description
Service Request Types	List the main types of services that can be requested.
Service Request Sub-Types	List the categories within each main service request type.

Optional Details from Client	Description
Spaces	In addition to Tenant Suites and Building Areas already defined, provide any spaces where Service Requests may be created that should be defined in the system.

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Service Req tab

Instructions:

- Edit the Standard Type and Sub Type columns to include only those entries you want added to your system
- Add any additional Type and Sub Type entries in the Client Added columns that you want added to the system.
- List any Spaces that are not already defined where services may be requested in the building.

Payments (Stripe)

Payments can be processed through Cohesion Essentials. For clients that are using payment processing, specify that this should be enabled.

Client Details

Required Details from Client	Description
Enable payment processing	Specify if payments will be processed through Cohesion.

Template

Template file: Essentials_Client_Information.xlsx

Tab name: Payments tab

Instructions: Specify if payments will be processed through Cohesion.

Scripting for Faster Building and Module Setup

Details on how to use postman scripts to aid building setup (fitness, elevators, mapping, service request integrations, service request building).

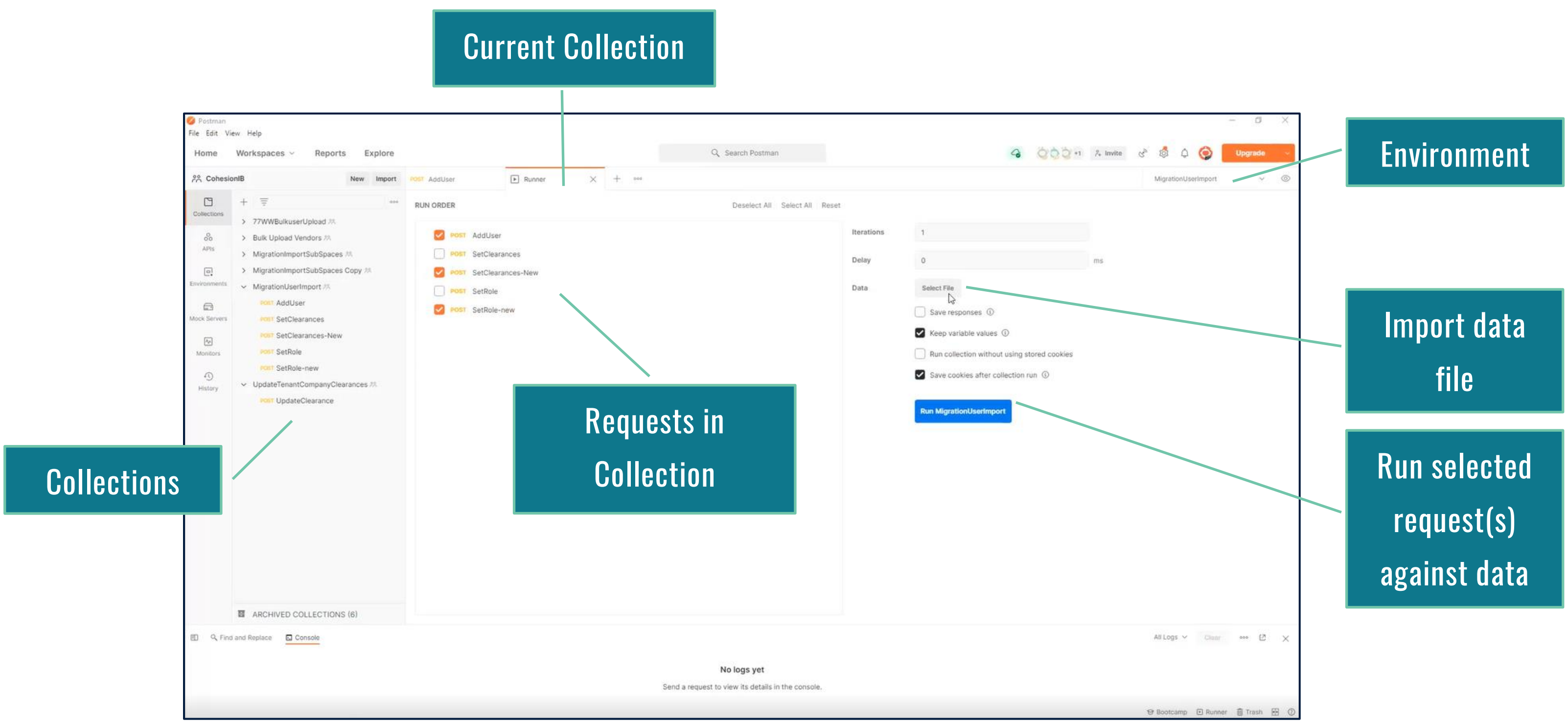
Audience: Internal

Using Postman for Building Implementation Tasks

Below is a high-level look at Postman and how to use the tool for implementation tasks to set up Cohesion. Be sure to create a Postman account using your CohesionIB email address.

You can read more in Postman's own [Introduction].

Navigating Postman



Read more in the Postman docs: [Navigating Postman].

What is an Environment?

An environment is a set of variables (reusable values that can be referenced throughout collections, environments, requests, and test scripts) you can use in your Postman requests.

They are used to group related sets of values together and manage access to shared Postman data.

You can import an environment.json file into Postman and then edit the variables for your specific scenario, such as buildingCode, buildingName, and more.

For more information, see Managing environments.

What is a Collection?

A collection is a set of API requests that are executed in sequence. The Collection Runner logs your request test results, and your scripts can pass data between requests as well as alter the request workflow.

Requests in a Collection run in the order they are listed. You can adjust the request order and even deselect a request to exclude it.

Cohesion has predefined Collections for repeatable requests and, in some cases, vendors provide their own Collections.

List of Collections that exist for implementations and where they can be accessed:

- Collection name + location (TBD)
- Collection name + location (TBD)

For more information, see Using the Collection Runner.

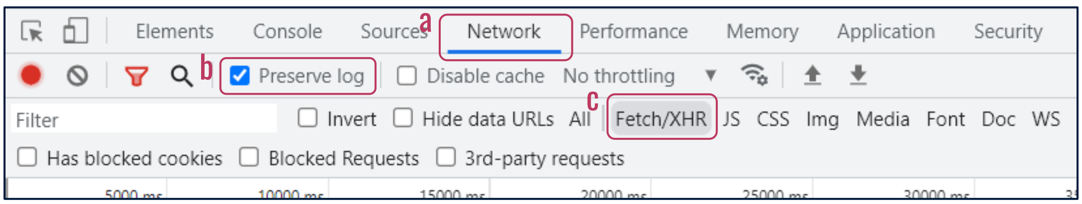
Using Swagger for Building Implementation Tasks

Authentication

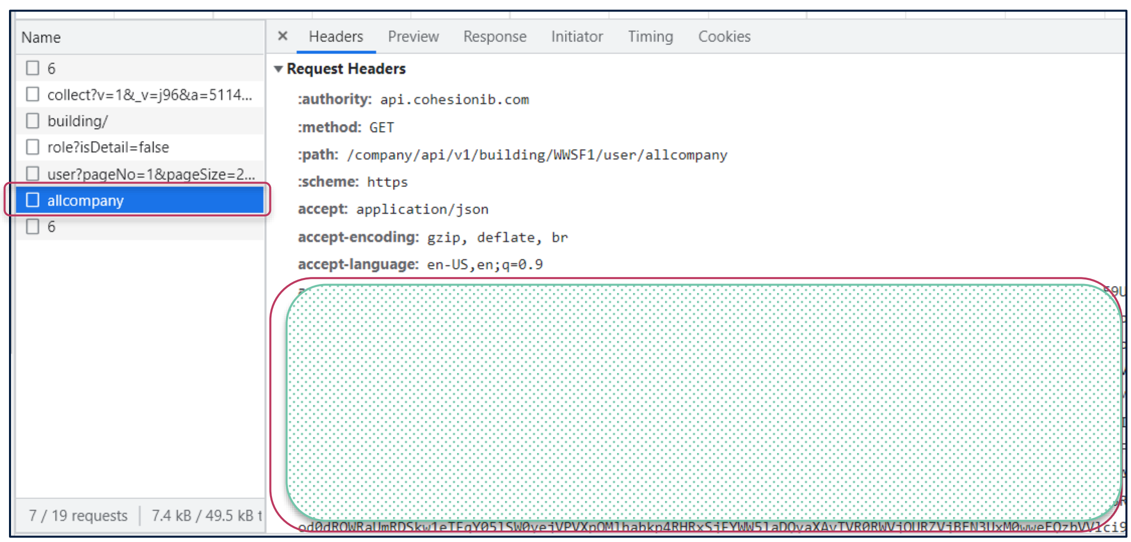
Swagger requires you to authenticate with a Bearer token prior to using any of its functions.

IMPORTANT: If you are confused about how to use Swagger after reading these steps, please do not attempt any updates. Swagger will update/add/delete data live in the production environment and undoing changes is not possible for most tasks. Contact a member of the Implementations team for help.

1. Open the API you want to use.
2. Log in to the Cohesion system you want to update and then press **F12** to open Developer Tools.
3. In the Developer Tools window, set up the screen with the following options:
    a. **Network** tab active
    b. **Preserve log** enabled
    c. **Fetch/XHR** filter selected



4. In Cohesion, select the **Users** module (or any other menu item).
5. In Developer Tools, select an XHR item, such as **allcompany**, and find the **authorization Bearer** under Request Headers.



6. In the website for the API, select **Authorize** at the top of the screen.
7. Paste in the Bearer token from Developer Tools into the **Value** field and click **Authorize**.

    Once authorized, you are able to use any of the calls to the system you see listed in Swagger.

The output will only affect the building for which you obtained the bearer token.

Most tasks will require a GUID ID to be run. Depending on the type of task, the GUID ID can be obtained directly from the database or can be found in the URL when editing the item.

Common APIs for Building Set Up

- User Management: User API (Prod)
- Service Request Management: Service Request API (Prod)
- Fitness Center: Fitness Center API (Prod) | Fitness Center API (Dev)
- Access Control: Access Control API (Prod) | Access Control API (Dev)
- Elevators: Elevators API (Prod) | Elevators API (Dev)

Mass Subspace Upload and Space Mapping

Once you have an export data file of the building's Subspaces, they can be uploaded to the Cohesion system using Postman to populate the GraphQL database.

1. Using Postman, open the Subspace Collection.
2. Edit the Environment variables to reflect the current building.
3. Run the Subspace import script (need exact name).
4. In Cohesion, map Spaces to the Subspaces that have been added to the system.

User Import

Users that exist in a building's access control system can added to the Cohesion system via bulk user import. A User Upload file must be generated from the access control system by exporting the users into a CSV file. This Upload File is then used in conjunction with Postman to populate the users in the Cohesion system.

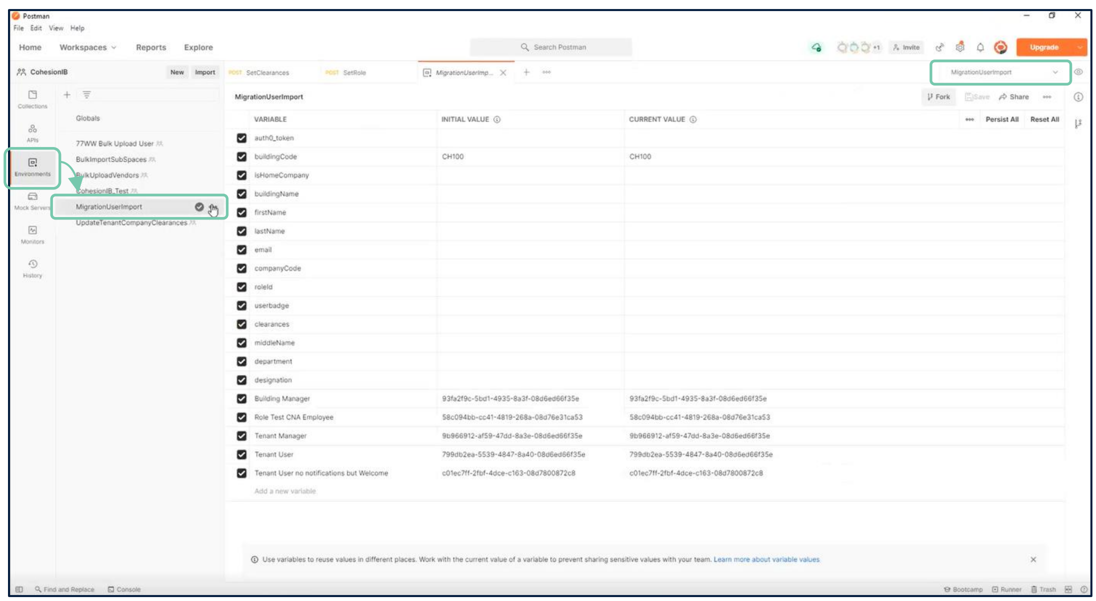
These steps involve using Postman and saved Collections. For details about using Postman and accessing Collection and Environment files, see Using Postman for Building Implementation Tasks.

Columns included in a basic user upload:

- buildingCode - Building code found in the URL of your building. Same for all entries.
- buildingName - Building Name written out - Same for all entries.
- firstName - First Name of your user
- lastName - Last Name of your user
- email - Email of your new user
- companyCode - Company code of tenant company of uploaded user
- roleId - GUID of the role the user will have

NOTE: Before performing these import steps on a large set of data, try importing a subset (2-3 users) of the entire upload file first to ensure all of the data imports as expected.

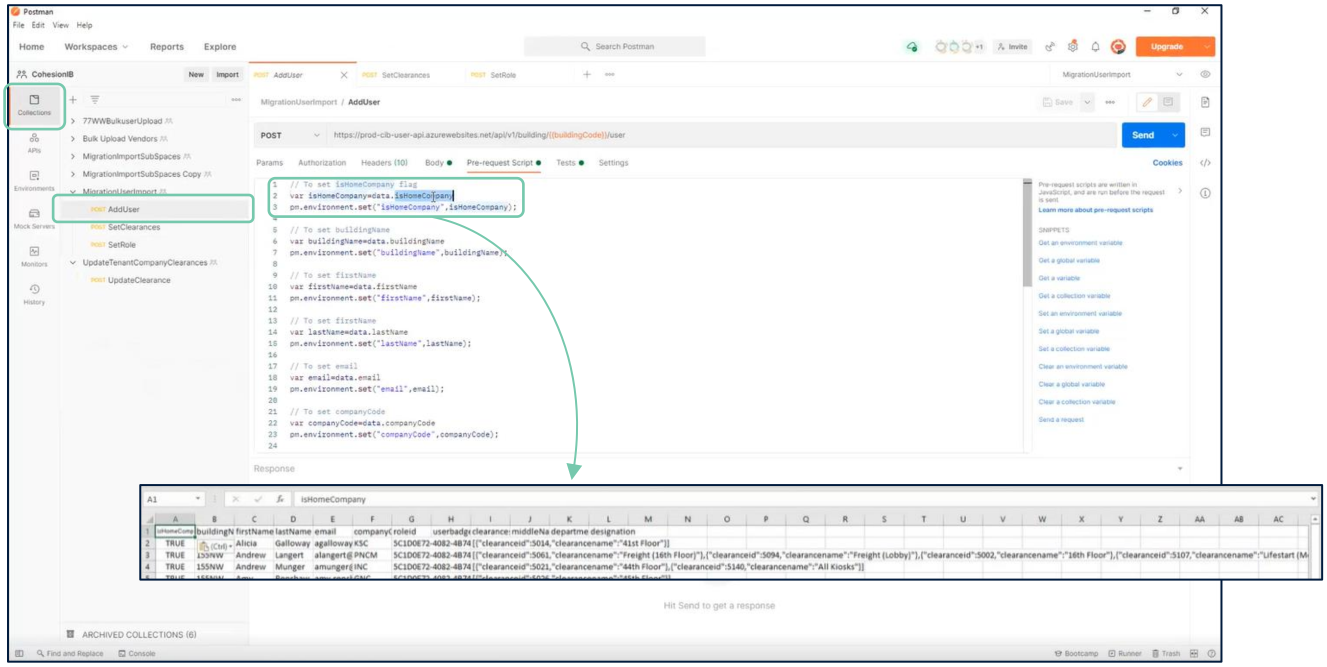
1. Open the User Import collection (MigrationUserImport.postman_collection.json).
2. Open the User Import environment file (MigrationUserImport.postman_enviroment.json) and update the following variables to reflect your current implementation:
    - Update BuildingCode variable
    - Update auth0 bearer token
3. Navigate to the MigrationUserImport environment.



4. In the AddUser request, verify that the **Pre-request Script** variables match the column headings in the User Upload file provided by the building.
    a. In the left pane, select **Collections**.
    b. Open the **MigrationUserImport** collection and open the **AddUser** request.

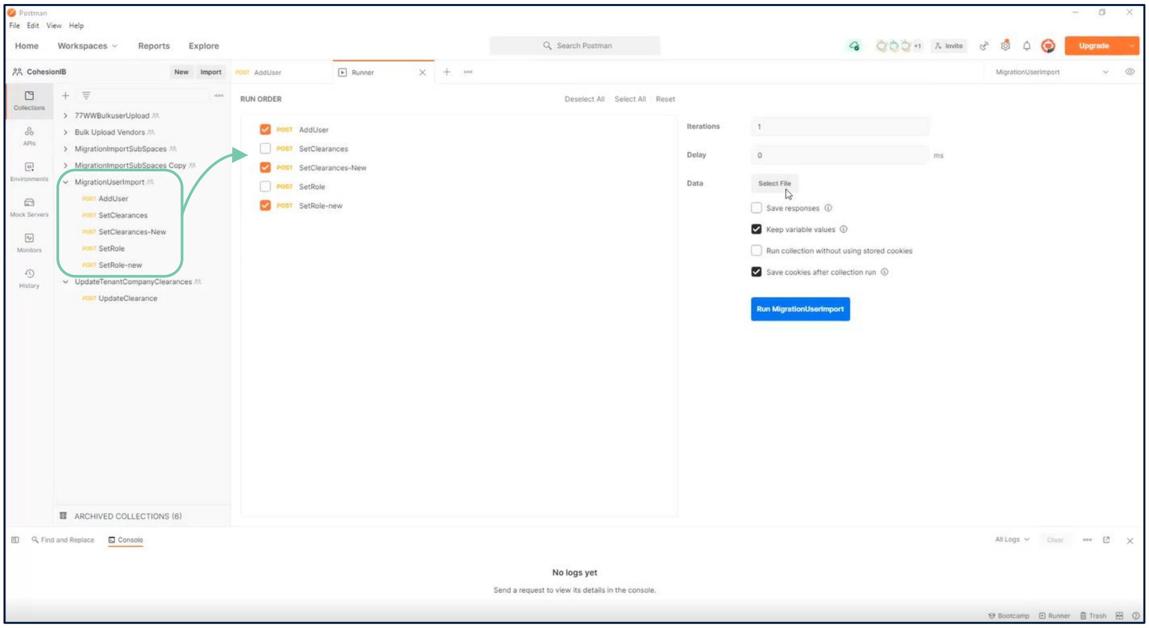
c. Compare each variable on the Pre-script Request tab to the headings in the User Upload file.

If there are any mismatches, copy the variable from the Pre-script Request and replace the value in the User Upload file.



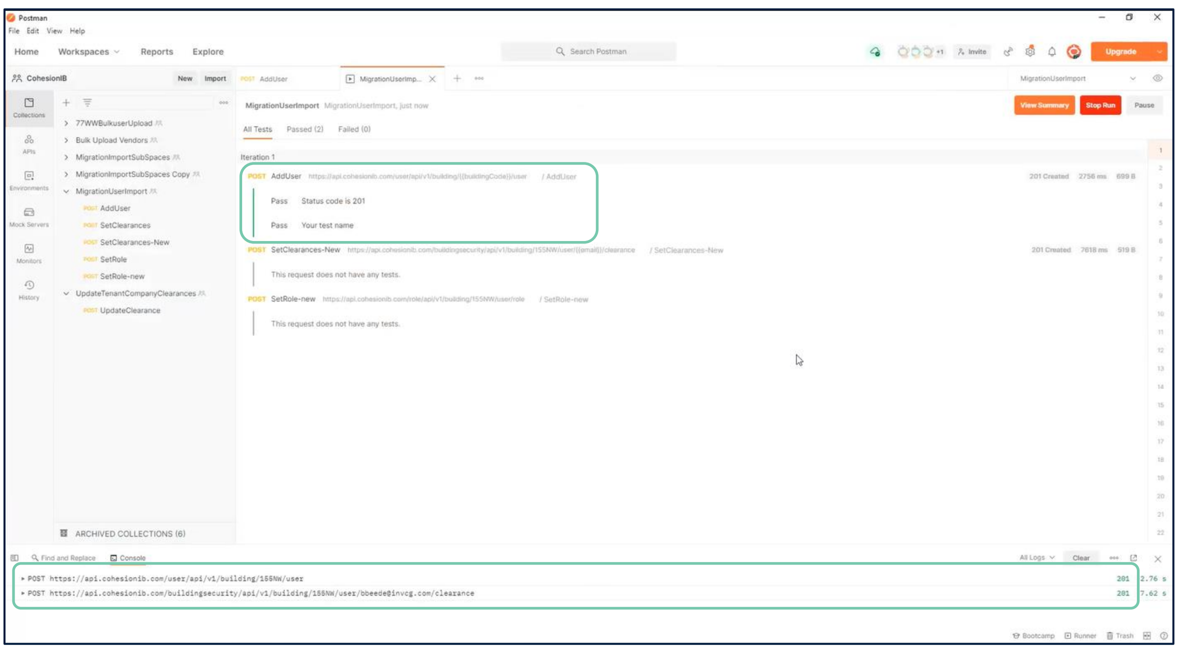
5. In Postman, open the Collection Runner.
6. Drag the collection MigrationUserImport into the Runner pane and make sure the following methods are selected:

- POST AddUser
- POST SetClearances
- POST SetRole



7. Import the User Upload file (provided by the building) and click **Run MigrationUserImport** to run the collection.

   As requests are processed, the status displays for each entry.



To confirm users are added to the Cohesion system, search for a user email address and confirm all of their data in the upload file exists in the Cohesion system.

Fitness Center Setup

- Set Up Data using Mindbody Postman Collection
- Building Setup

Set Up Data using Mindbody Postman Collection

1. Download the Postman collection (click "Run in Postman"): https://developers.mindbodyonline.com/PublicDocumentation/V6#postman
2. Modify the UserToken request in the collection:
    a. In the collection, select **UserToken**.
    b. Select **POST Issue Token Staff** and then select **Tests** at the top of the request.
    c. Replace line 2 with this line of code:

    pm.environment.set("staffAuthToken", data.AccessToken);
3. Create a new Environment named “Mindbody API – DEV.”
    a. Click **Environments** and create a new environment.
    b. Name the Environment “Mindbody API - DEV.”
    c. Make sure to get the API Key from the Azure Key Vault (Igloo key vaults). The Dev Environment should look like this:

Variable	Initial Value	Current Value
API Key		
siteId	-99	-99
baseUrl	https://api.mindbodyonline.com/public/v6/	https://api.mindbodyonline.com/public/v6/
staffAuthToken		
staffUserName		
staffPassword		

4. Create another Environment named “Mindbody API – PROD.”

Make sure to get the API Key and Staff Credentials from Azure Key Vault (Igloo key vaults).

The siteId can be taken from the “BuildingFitnessIntegrations” table in SQL server.

Now that two different Environments have been created, you will be able to switch between Prod and Dev Environments by selecting the Environment at the top-right in Postman.

IMPORTANT: When switching buildings, be sure to switch the siteId for Prod. You can get siteIds from the "BuildingFitnessIntegrations" table in SQL.

Building Setup

Below are the steps that need to be performed by the Solutions Engineering Team to get a building set up to use Fitness Center functionality.

- Gather Required Integration Details
- Map Building to Fitness Integration Provider
- Connect to the Mindbody Developer Account
- Complete Gym Info Page in Cohesion/Fitness setup

Gather Required Integration Details

1. Contact the client for the following information, which is required for the Cohesion integration with Mindbody:
   - Mindbody siteId
   - Name of the staff member who is the Gym Manager in Mindbody
2. Get staffId of the person who is the Gym Manager in Mindbody (you'll use for your request to the Fitness Center API).

   There are two ways to get this:
   - Contact to a Team Igloo backend developer and give them the name of the staff member who is the Gym Manager in Mindbody. They will look up the person and give you the staffId to use.
   - Use the Get Staff request in Postman.

     The Collection set up is described in Get Set Up Data using Mindbody Postman Collection.

For details about using Postman, see Using Postman for Building Implementation Tasks.

a. In the Mindbody Postman Collection for the Production environment, make a request to "Staff" > "Get Staff."

b. Remove any staffId query string parameters and then find the staffId of the person who is the Gym Manager.

3. Get an image to be display on the Gym Info page.

Map Building to Fitness Integration Provider

- Add the following entries to the Cohesion system SQL database. You can use Swagger to create this configuration or update the database directly.
    - SiteId – this refers to the third-party fitness provider's site/location/clientId (currently this only refers to MindBody's SiteId)
    - FitnessIntegrationId – this represents the Id of the particular fitness integration, which can be found in the FitnessIntegrations table

Map using Database Entry

- In the "BuildingFitnessIntegrations" table in SQL Server, update the siteId and fitnessIntegrationId.

Map using Swagger

1. Access the Fitness Center API.
2. Authorize the server in Swagger (for details, see Authentication).
3. Execute the following method: POST /api/v1/BuildingConfiguration.

Connect to the Mindbody Developer Account

1. Now that the siteId is stored on the Cohesion end, follow these steps from the Mindbody Developer page, in the topic “Taking Your Application Live”: https://developers.mindbodyonline.com/PublicDocumentation/V6#taking-application-live.

   Use the credentials stored here to log into the developer portal: https://portal.azure.com/

2. Once the developer account is associated with a new site, add a new entry into Prod-Igloo-KeyVault for "MindbodyApiSettings--StaffCredentials--{BuildingCode}".

   The value of this secret should be the same as the other staff credentials that are in the Key Vault. See other key/values for reference.

Complete Gym Info Page in Cohesion/Fitness setup

1. Gather the details needed to post the gym information. You will need the following request parameters:
   - name – Fitness Center name
   - imageURL – the main image to use for the Fitness Center module (see note below)
   - phoneNumber – Fitness Center phone number
   - cohesionBuildingId – Building code
   - gymHours – Fitness Center operating hours
   - staffId – staffId for the Gym Manager in Mindbody
   - staffTitle – Gym Manager title in Mindbody

     NOTE: If you do not have an image URL you can create one by following these steps.

     a. Log in to the building and go to Building Details > Building Information (core.cohesionib.com/{buildingCode}/setup/details).

     b. Press F12 to open Developer Tools and select the Network tab.

     c. In the Information module, upload an "Other Image" on this page.

        This image should have been provided by the client.

     d. In the response for uploading this in Developer Tools, copy the image url.

     e. Delete this photo in Cohesion after you have grabbed the image url.

2. Use the Fitness Center API to fill in the gym information to be displayed on the "Gym Info" page:

   "POST /api/v1/FitnessCenter"

3. In Cohesion, enable the Fitness module for the building.

4. Run the sql below for adding the menu items.

5. In Cohesion, enable role permissions for the Fitness Center.

   a. Make sure that the Fitness Manager has the "Can manage fitness clients" permission enabled for their role.

b. For clients of the fitness center, ensure that they have a role with the "Can Reserve Fitness Classes" permission.

Service Request

- General Instructions for Service Request Set Up
- Building-Specific Instructions

General Instructions for Service Request Set Up

- Define Service Request Spaces and Subspaces
- Insert Subtypes, Types, and Priority via Swagger
- Service Request Management Building Role
- Notifications for the Service Request Management Building Role
- Get API Key into Key Vault
- Map Property to Cohesion Building
- Add Companies in Cohesion
- Map Company IDs to Service Request System Tenants
- Map Service Request System Users to Cohesion Users (using SR vendor API)

Define Service Request Spaces and Subspaces

Ensure that all spaces and subspaces needed for service requests exist in Cohesion. Spaces that were entered for the building set up may not have been done with service requests in mind.

Clients should have completed a template listing the spaces and subspaces in their building. Refer to the following topics for information on what clients are asked to provide:

- What Information Do We Need from Clients?

- Building Subspaces
- Building Spaces
- Service Requests (native)

Insert Subtypes, Types, and Priority via Swagger

When creating a service request in Cohesion, users need to select a Type, Subtype, and Priority to describe the service they are requesting. The Types, Subtypes, and Priorities that are available must be defined in the database.

There are two scenarios for entering this data, depending on the Service Request system:

- Native Service Request module: In this case, all Types and Subtypes can be defined for Cohesion using the defaults, plus any additional options the client would like.
- Integrated Service Request Management system: In this case, the Types and Subtypes need to match between the Cohesion system and the integrated system. Evaluate the Types and Subtypes that exist in the integrated system and the default options defined for Cohesion, and then identify any additional Types and Subtypes that need to be added so the systems match.

Add Default Types and Subtypes

Note: there are two ways to do this: using Swagger or using new Admin UI in Configurations. Need to update these steps with new UI options.

Use the Service Request API to insert Types and Subtypes for service requests. You can also add additional Types and Subtypes that may be needed.

IMPORTANT: These links are for Production.

- Get default types: GET /api/v1/servicerequest/DefaultType
- Get default subtypes: GET /api/v1/servicerequest/DefaultSubtype
- Add a new type: POST /api/v1/servicerequest/type
- Add a new subtype: POST /api/v1/servicerequest/subtype

Add Priorities

IMPORTANT: This link is for Production.

Use the Service Request API to insert add service request priorities to the system.

- Add service request priorities: : POST /api/v1/servicerequest/priority

Service Request Management Building Role

In some cases, a specific building role is needed to manage Service Requests. This applies to buildings using native Service Request functionality or in buildings where Engineers need special permissions for work orders. To handle these situations, a dedicated building role should be created in Cohesion.

This role should include all of the Service Request permissions in Building Details > Roles.

- Service Request enabled
- All of the sub-module permissions enabled for All companies' service requests.

Notifications for the Service Request Management Building Role

If a dedicated building role is created to manage Service Requests, that role should be configured with the proper notification settings. This ensures the role responsible for managing service requests is notified when new requests are submitted, and when other service request activity occurs.

In Configurations > Notifications, select the role that has the Service Request permissions enabled and edit their Service Request notifications.

Get API Key into Key Vault

For integrated Service Request systems, get the vendor's API key authorization (or access granted to an existing key) then provide the API key for the integrated building to the Dev team so they can add it to Key Vault. The naming convention is "{SR System}-{buildingCode}".

Map Property to Cohesion Building

Integrated Service Request systems need to be added to the Postgres database. Typically, there is a table dedicated to the integrated system named like this: "{SR Mgmt system}_property_building_map."

In the property_building_map table, map the Property to the Cohesion Building

This is a two-step process:

1. Get the Property ID from the Service Request system. Depending on the system, this could involve using their Postman Collection.
2. In the "{SR Mgmt system}_property_building_map" Postgres table, manually map the Property ID value to the Cohesion Building value.

Add Companies in Cohesion

Add the user Companies in the Cohesion system (Settings > Tenant Companies) if they do not yet exist.

Map Company IDs to Service Request System Tenants

Map the Companies and their IDs to the Service Request system Tenants in the "{SR Mgmt system}_tenant_company_map" table.

1. Get the Tenants from the Service Request system. Depending on the system, this could involve using their Postman Collection.
2. In the "{SR Mgmt system}_tenant_company_map" Postgres table, insert the Tenant ID, Company Code, and Building Code to map the Companies and their IDs to the vendor Tenants.

Map Service Request System Users to Cohesion Users (using SR vendor API)

In the Service Request API, map Service Request system Users to Cohesion Users using the POST /api/v1/servicerequest/MapUsers/{buildingCode} endpoint.

For the mapping to work, the Cohesion Users that need to be mapped must have a Company associated with them and that Company must be present in the "{SR Mgmt system}_tenant_company_map".

NOTE: There is an additional endpoint for getting the map; call that if you want to see the map after creating it.

Building-Specific Instructions

Check Mapping between Cohesion and Facility 360 Systems

All Mappings for 360 Facility occur in a table called "Facility360Mapping".

The below statement enables you to check for a user and if they are mapped in 360 facility. Replace "ENTER GUID HERE" with the GUID of the Cohesion user you are checking the mapping for.

```
SELECT "MappingId", "BuildingCode", "EntityTypeId", "CohesionId",
"Facility360Id"

      FROM public."Facility360Mapping"

      Where "CohesionId" = 'ENTER GUID HERE' and "EntityTypeId" = 1
```

A successful check will yield 1 result for your user that will include the “Facility360Id” that the Cohesion user is tied to. Lack of a result in this search would mean the user is not mapped and you must find the corresponding 360facility account to map to.

In the above SQL, replacing the "EntityTypeId" = 1 to reflect any of the other values pictured above will transform your query to search for existing mappings for other types of data.

This legend below will show what type of data is being associated in any given entry in this table:

User = 1

Company = 2

Floor = 3

Zone = 4

Space = 5

Type=6

SubType = 7

ServiceRequest =8

Status= 9