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Creating and Modifying Chart of Account Elements Related to TRIRIGA Integration

TRIRIGA Facilities Management application supports facility operations and maintenance, project management, space reservation, site planning, and contract management.

TRIRIGA is a web-based system that integrates real estate, capital projects, facilities, operations, portfolio data, and energy management in a single web platform. Each of these components is presented as a portal that contains all of the related tables, forms, and menus for that business function.

TRIRIGA also provides the ability to interface with other State applications, including Arizona Financial Information System (AFIS) and Arizona Procurement Portal (APP) for accounting and purchasing transactions. In order to facilitate some of those integration, the selected COAs are need to be interfaced from AFIS to TRIRIGA.

The AFIS Function code has been selected as the primary element for TRIRIGA and will map to the TRIRIGA from the Function Code. The majority of Chart of Accounts elements are inferred.

Creating a Function

Log into AFIS. Navigate to the Page Search table as shown in this image.

1. In the Description field, enter \textit{FUNC}*
2. Click Browse or Enter
3. Select Function – FUNC
Locate existing Function to be used as an example

1. Click Search
2. In the Fiscal Year, enter 2021
3. In the Department field, enter your department code
4. Click OK

Create the new Function

1. Select the record to copy – once selected there is a checkmark to the left of the fiscal year
2. Click Copy
3. Click Paste

Complete the General Information section. At a minimum, enter the following information:

1. Fiscal Year: current fiscal year
2. Department: 3 letter alpha for agency
3. Function: 10 characters’ maximum, can be numbers, letters or mixture of both
4. **Name:** 60 Characters’ maximum, can be numbers, letters or mixture of both (only first 30 characters will be interfaced)

   In order to support integration, the Function element must not include spaces in the naming convention. The space needs to be simulated by using underscore or dash characters:

   - **GAO 55221** – is not supported
   - **GAO_55221** – is supported

5. **Short Name:** 15 characters’ maximum, can be numbers, letters or mixture of both

   Complete the **Extended Description** section.

   At a minimum, enter the following information:
   - Extended Description – Additional comments

6. **Active:** check box if function will be active

7. **Budgeting:** needs to be always checked

8. **Click Save**

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**Creating a Function Inference**

Navigate to the **Page Search** table.

1. In the **Description** field, enter **FUNC***

2. Click **Browse** or **Enter**

3. Select **Function Inference** – **FUNCINF**
Locate existing Function Inference to be used as a template

4. Click **Search**
5. In the **Fiscal Year**, enter **2021**
6. In the **Dept.** field, enter your department code
7. Click **OK**

Create the new Function Inference

Select the record to copy – once selected there is a checkmark to the left of the fiscal year

1. Click **Copy**
2. Click **Paste**
Complete the record. At a minimum, enter the following information:

1. **Fiscal Year**: Current fiscal year
2. **Department**: agency three letter reference
3. **Function**: When creating the Function Inference for the Function which will be used for TRIRIGA integration (Function Type is LGST or HRLG) you must enter at least the following elements:
   - Fund
   - Appropriation Unit
   - Unit
   - Task
4. Click **Save**, and the new function inference will be populated in the grid.

After Function and Function Inference record are established, you may proceed to updating Function Roll-up on the Function (FUNC).
Updating Function Rollup

Navigate to the Page Search table.

1. In the Description field, enter **FUNC**
2. Click Browse or Enter
3. Select Function - FUNC

Locate Function to be updated

Click Search

4. In the Fiscal Year, enter **2021**
5. In the Department field, enter your department code
6. In the Function field, enter the Function value to be updated
7. Click OK.
Complete the **Rollups** section. At a minimum, enter the following information:

1. **Function Type**: enter Function type (LGST or HRLG):
   - **LGST** – The Function element will be included in the interface to TRIRIGA
   - **HRLG** – The Function element will be included in the interface to HRIS and TRIRIGA

2. **Click Save**

   **Note**: You will not be able to enter Function Type until Function Inference (FUNCINF) is created. The following error will be displayed if Function Inference has not been created.