



Facilities Management

IBM TRIRIGA

Training Guide

Version 4.0

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About This Training Guide

TRAINING GUIDE DESCRIPTION

This training guide covers the use of IBM TRIRIGA, a web-based Facilities Management application that supports facility operations and maintenance. Users will learn how to complete processes for the generation and management of work tasks, building systems and equipment.

TRAINING GUIDE OBJECTIVES

In this training guide, you will:

- Identify the setup and configuration of projects and portfolio objects
- Perform common operations functions

Overview of TRIRIGA Functionality

TRIRIGA is an Integrated Workplace Management System (IWMS) 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 for accounting and purchasing.

User roles play a key part in the software interface by controlling what portals and pages a user can access. Many aspects of the environment can be customized to a user's personal needs.

1. Setup and Configuration

Learning Objectives

In this lesson, you will:

- Identify the goals and configuration of the Organizational Structure
- Identify the goals and configuration of the Geographical Structure
- Examine available classifications

Lesson Overview

Portfolio data is the core information that is used to manage workplaces. The portfolio consists of information about the organizations, locations, people and assets that are associated with the space being managed. To assist in proper categorization of portfolio data, lists, classifications, geographies and specifications are set up as part of the initial configuration of the system.

1.1. Organizational Structure

Organizations are used to define the hierarchical structure of the enterprise. Organizations can also represent external companies such as vendors, tenants, landlords and customers.

The organization structure is hierarchal and set up based on a parent/child relationship. A parent organization record can have however many departments or divisions as necessary to represent the structure of the organization.

The organizations hierarchy can be included on various templates to define how work or approvals are routed.

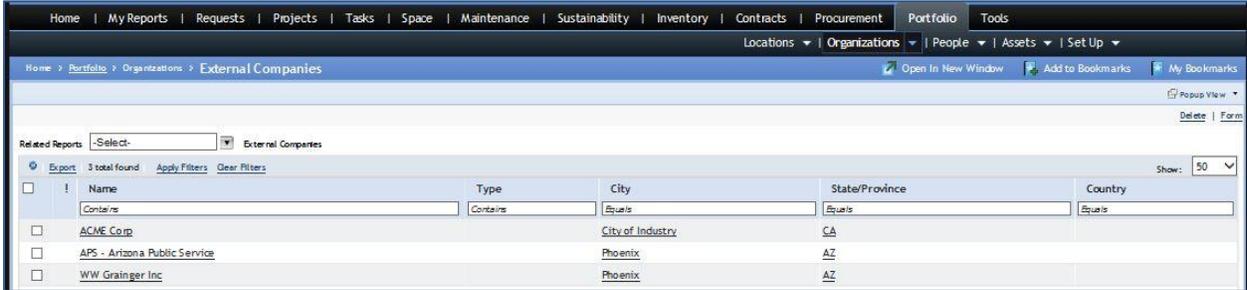
Government

Government organizations represent departments that are part of the State. Each department is defined as an agency at the parent level of the hierarchy. Additional divisions related to those departments are created at the next level down in the hierarchy, also as agencies.

Name	ID	Type	Status
State of Arizona	1000501	Agency	Active

External Companies

External companies can be represented as vendors, customers, tenants, non-State partners or other governments. Any external organization that is related to the functions of facilities management within the system must have a record set up in the organizational hierarchy. Like government organizations, external organizations can have child divisions within their hierarchy.



Any facilities management related external organizations that are defined as vendors or customers will have a matching record in AFIS. AFIS will interface regularly with TRIRIGA to create external organizations. The automated set up of matching vendor records will assist in purchasing functions for work orders and real estate payments for 3rd party leases.

1.2. Geographical Structure

The geographical structure is used to define the geographical area of property specific to an organization. Similar to the organization structure, the geographical structure is hierarchal and set up based on a parent/child relationship. A parent geographical record can have however many dependent geographical units as necessary to represent the structure of the organization.

The typical hierarchal structure of geographical areas can include a combination of world region, country, state, region, metropolitan area, county and city. Because each department using TRIRIGA has a different geographical definition, the names of the organizational hierarchy have been used within the structure to indicate the structure specific to that department.

The geographical hierarchy can be included on various templates to define how work or approvals are routed.

Country

“Country” is the top of the hierarchy which defines the organization with the highest geographical authority.

Country	World Region	ID	Status
Administration	North America	1000001	Draft
Industrial Commission	North America	1000000	Draft
Transportation	North America	1000002	Draft

Region

“Region” is defined as the organization that is responsible for any property within its geographical structure.

Region	Country	ID	Status
ADA-Dept of Administration	Administration	1000051	Draft
AHA-Dept of Agriculture	Administration	1000055	Draft
CLA- State Fair and Exhibition	Administration	1000056	Draft
DCA-Dept of Corrections	Administration	1000050	Draft
DEA-Dept of Economic Security	Administration	1000049	Draft
DJA-Dept of Juvenile Corrections	Administration	1000057	Draft
DTA-Dept of Transportation	Transportation	1000071	Draft
EVA-Dept of Environmental Quality	Administration	1000058	Draft
FOA-State Forester	Administration	1000059	Draft
GFA-Game and Fish Dept	Administration	1000053	Draft
HCA-AHCCCS	Administration	1000060	Draft
HIA-AZ Historical Society	Administration	1000061	Draft
HSA-Dept of Health Services	Administration	1000052	Draft
ICA-Industrial Commission	Industrial Commission	1000072	Draft
MAA-Dept of Emergency and Military Affairs	Administration	1000062	Draft
PHA-Prescott Historical Society	Administration	1000063	Draft
PIA-AZ Pioneers Home	Administration	1000064	Draft
PRA-State Parks Dept	Administration	1000065	Draft
PSA-Dept of Public Safety	Administration	1000054	Draft

State/Province

“State/Province” is defined by the responsible organization to identify geographical areas specific to their business process. Geographical areas include, but may not be limited to region, unit, district or any other name that the organization uses at the lowest level of the geographical hierarchy.

1.3. Classifications

Classifications define how records are related to each other within the classification hierarchy. A classification is a type of record that defines various data elements contained within the operational records.

Classifications can be used by queries, forms and workflows to determine how a record is managed. Generally, classifications are pre-defined, but new ones can be requested if necessary.

Type, Class, Status, Category, Code, Use, etc.

There are many classification types which allow a user to define general attributes about a data element. Classifications typically appear in a query format that is accessible by clicking on the magnifying glass to the right of the field, a list with a drop down menu or through a “find” query.

2. Operation Functions

Learning Objectives

In this lesson, you will:

- Identify the process of creating Locations
- Examine the specifications for vehicles and equipment
- Examine the management of building systems and equipment
- Review the utility meter creation and management process
- Create corrective maintenance work tasks
- Create preventative maintenance work tasks
- Identify the process involved in performing work tasks

Lesson Overview

This lesson examines many of the operational functions available in TRIRIGA for the management of assets, maintenance plans, and work tasks. The Portfolio is a central store of asset, location, and other records used throughout the system. Assets and specifications allow users to track and maintain detailed records for all owned equipment. Those assets can be maintained by performing regularly scheduled and as-needed maintenance work tasks.

2.1. Manage Portfolio Locations

The Location structure in TRIRIGA is hierarchical, meaning that records are organized based on their relationship with other locations. This allows the Location structure to mirror the physical location boundaries and relationships or be created independent of physical location structures in any way necessary.

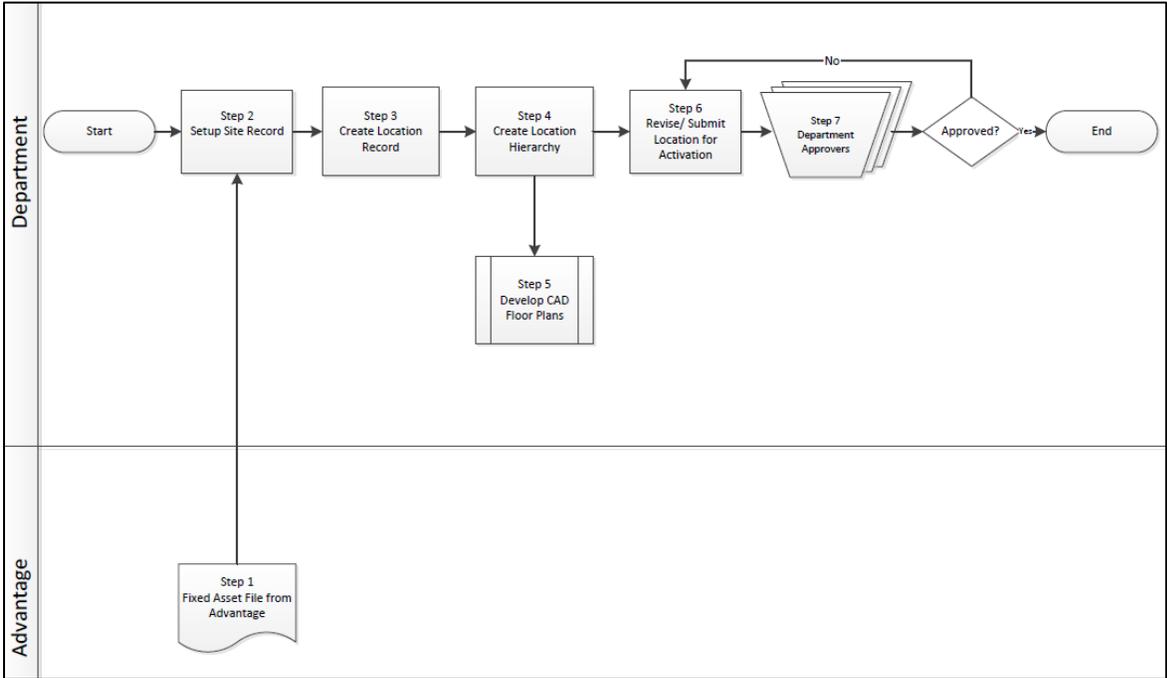
Locations

The Portfolio > Locations portal contains a listing of the locations in the hierarchy. A typical setup of location types in the hierarchy is as follows: Property > Building(s) > Floor(s) > Space(s). The available location type options vary based on the parent location type.



Since AFIS is the system of record for all Fixed Asset information, most new location or facility related equipment data will be sent from AFIS to TRIRIGA to establish a shell record. The TRIRIGA user will then complete the record with additional information not captured in AFIS. It is possible that some locations and/or equipment may not meet the criteria for Fixed Assets and a department may decide not to create those records in AFIS. In this case, the TRIRIGA user will create the record directly in TRIRIGA for facilities related items.

Figure 1: Manage Portfolio (IM-TB-002)



Create a Location Record

Some sections of the Location form will only be used when appropriate for the location type being created. For example, defining environmental details may be relevant for a building or land location record but not necessary when defining a space or room location record in the hierarchy.



To create a new location record, navigate to the existing node in the location hierarchy that will be the parent for the new location and select New. Then select what type of location record is to be created. When adding information to a Location record, it is important to save changes regularly so that they are not lost by accident.

Building: Print Help

General Contact Details Graphic Area Measurements Contracts Building Equipment Assessment Create Draft X

(Required): General Information for this Building.

General

ID Status Image

* Name

Description

Hierarchy Path

Details

Legal Name

Common Name

Parking Spaces (Open) Parking Spaces (Covered)

Tenure

Building Class Headcount

Zoning Headcount (manual)

Total Area Occupied square-feet Time Zone

Primary Use Total Area Occupied (manual) square-feet

Jurisdiction

Insurance Underwriting

Flood Zone Earthquake Zone

Marshall Valuation Classification Code

IBC Construction Type % Sprinklered

Fire Alarm Smoke Detector

Environmental Details

Carbon Calculation Method Carbon Calculation Region

Total CO2e (Carbon Footprint) US Tons CO2 Certification Level

Total CO2e (Carbon Footprint) Equity Share US Tons CO2 Equity Share (Percent)

Occupancy Rate (Percent) Electric Metering Type

Company Pays Utilities Weather Station

Energy Reporting Exempt Status Climate Zone

Total Annual Utility Bills US Dollars Climate Division

Annual Energy Use kilowatt-hours Carbon Calculation Needed

Last Update

General

In the General section on the General tab of the Location form, complete the following fields:

- ID
- Description
- Image
- Name

Insurance Underwriting

The Insurance Underwriting section is used when defining a building location. Complete the following fields:

- Flood Zone Indicator
- Earthquake Zone Indicator
- Marshal Valuation Classification Code
- IBC Building Construction
- Number of Stories
- Percent Sprinklered
- Fire Alarm Indicator
- Smoke Detector Indicator

Details

The Details section can be used to designate a location with Parking as the function, usually for a building or structure. In the Primary Use field, select Parking as the value.

Primary Address

The Primary Address section of the form is used to define the physical location of the location record. Complete the following fields:

- Address
- Zip/Postal Code
- Geography Lookup
- City
- State/Province

The Geocode Address action can be used to derive the GIS coordinates, Latitude and Longitude, from the provided address.

Graphics

In the Graphics section, CAD drawings can be associated with a Floor location record.

Contact Details

On the Contact Details tab, users can assign roles to people for a location at any level of the location hierarchy. In TRIRIGA, roles are used to manage contacts. Each associated contact can have a designated role, such as Manager, Primary Contact, or HR Contact. The Approval and Notification functionality in TRIRIGA can be based on the Contact Role for a record. Contacts can be added in specific roles by selecting the Add People action in the Contacts section.

Area Measurements Tab

The Area Measurements tab is used to review space area measurements for the Location. The measurements displayed vary based on the form. Measurements are rollups from any child locations and typically include Gross Area, Rentable Area, Usable Area, and Property, Building, or Floor Common Area.

The screenshot shows the 'Area Measurements' tab in the IBM TRIRIGA interface. At the top, there is a navigation bar with tabs for 'General', 'Contact Details', 'Graphic', 'Area Measurements', 'Contracts', 'Building Equipment', and 'Assessment'. A 'Create Draft' button is visible on the right. Below the navigation bar, a summary line reads '(Summary): Review the Area Summary for the Building.' The main content area is divided into sections: 'Building Area Measurements', 'Floors', 'Building Area Measurement Details', and 'Area Summary'. The 'Building Area Measurements' section displays a table with columns for 'Gross Area', 'Rentable Area', and 'Usable Area', each with values of 0 and units of 'square-feet'. It also includes a 'Proration Rule' dropdown menu set to 'Balance To Measured'. The 'Floors' section shows a table with columns for 'ID', 'Floor', 'Floor Class', 'Capacity', 'Headcount', 'Rentable Area', 'Usable Area', 'Vacant Space', and 'Total Prorat'. The table currently displays 'No data to display' and a row of zeros.

Building Area Measurements	
Gross Area	0 square-feet
Rentable Area	0 square-feet
Usable Area	0 square-feet

Floors	
0 total found	
ID	Floor
No data to display	
0	0

Assessment Tab

The Assessment tab is used to review condition assessment information and the assessment history for building systems. On the Assessment tab, users can find information pertinent to managing assessment data and processes for a location including:

- Life expectancy
- Replacement cost
- Current condition index (with history log)
- List of opportunities and total cost of opportunities
- Repair and replacement funding
- Building systems
- Inspection history
- Regulatory information
- Valuation log

The screenshot displays the 'Assessment' tab interface. At the top, there is a navigation bar with tabs for 'General', 'Contact Details', 'Graphic', 'Area Measurements', 'Contracts', 'Building Equipment', 'Assessment', 'Maintenance', 'Reserve', 'Move', and 'Space Management'. A 'Create Draft' button is visible on the right. Below the navigation bar, the page title is 'Building:'. The main content area is titled '(Optional): Assessment information for this building.' and contains a 'Units' section with dropdown menus for 'Currency' (US Dollars) and 'Area Units' (square-feet). The 'Condition Details' section, titled 'Facility Assessment Analysis', contains several input fields and calculated values:

* A. In Service Date	<input type="text" value="25"/>	E. Gross Area	0	square-feet
B. Life Expectancy (years)	<input type="text" value="0"/>	F. Replacement Cost Per UOM	<input type="text" value="5.00"/>	US Dollars
C. Remaining Life	<input type="text" value="100"/> percent	G. Overhead Factor	<input type="text" value="0"/>	percent
D. Calculated End of Useful Life (A+(B*(C*.01)))		H. Calculated Replacement Cost (E*F)+(E*F*(G*.01))	5.00	US Dollars
Next Planned Renewal Year	0	I. Manual Replacement Cost	<input type="text" value="5.00"/>	US Dollars
2nd Planned Renewal Year	0			
3rd Planned Renewal Year	0			

Valuation

When necessary, users can add a record to the Valuation Log on the Valuation tab of the Assessment tab. The following fields are available on the new Valuation Log record:

- Valuation Name
- Valuation Type
- Valuation Method
- Jurisdiction
- Comments
- Effective Dates
- Estimated Costs
- Actual Costs

The screenshot shows a web-based form for creating a new Valuation Log record. The form is titled "Valuation" and has a navigation bar with tabs for "General", "System", "Work Flow Instance", and "Associations". There are "Print" and "Help" icons in the top right corner, and a "Create" button with a close icon in the top right of the form area. Below the navigation bar, there is a note: "(Required): Valuation Details for the Location." The form is divided into three main sections: "General", "Units", and "Details". The "General" section has fields for "ID", "Status", and "Name". The "Units" section has a "Currency" dropdown menu set to "US Dollars". The "Details" section has "Valuation Type" (Misc.), "Valuation Method" (Not Applicable), "Jurisdiction", and "Comments" (a text area). Below these are "Effective From" and "Effective To" date pickers, and "Estimated Cost", "Actual Cost", "Estimated Rate", and "Actual Rate" fields, each with a value of "\$.00" and "US Dollars". A "Create" button with a close icon is at the bottom left.

Regulatory Information

From the Assessment tab, the Regulatory Information tab is used to review the list of existing license and permit information for the location. Users can add entries to this list by clicking the Add action. Complete the detailed information for each record in the following fields:

- Regulation Name
- Description
- Regulation Type
- Jurisdiction
- Code
- Issue Resolution

- Inspection Details
- Key Contacts

Regulatory Information : Print Help

General Inspection Details Contacts System Work Flow Instance Associations Create X

(Required): General Regulatory Information for this Record.

General

Status

* Regulation Name

Description

Units

* Currency

Details

* Regulation Type Regulation Category

Regulation

Jurisdiction

Code Regulation Title

Edition Local Amendment

Issue

Description

Date Open Estimated Cost US Dollars

Date Closed Actual Cost US Dollars

Resolution

Description

Date Open Estimated Cost US Dollars

Date Closed Actual Cost US Dollars

Maintenance

The Maintenance tab is used to review maintenance work activity information and maintenance history for the location record. In the Maintenance Details section, enter a value in the Maintenance Priority field. The Maintenance tab can also be used to view preventative maintenance schedules and procedures, building systems installed, meter allocations and readings, project activity, and work orders/tasks for the location.

Building Equipment

The Building Equipment tab is used to review the list of equipment associated with the location. The list cannot be modified in this view but the information can be searched, sorted and filtered if needed.

Notes and Documents

The Notes and Documents tab is used to add informational comments or documents related to a location record.

Activation

Once data entry for the location record is complete, the user can activate the location record using the Activate action at the top of the form. If approval is required to activate a location, the record status will be set to Review in Progress, pending the completion of the approval action.



ACTIVITY 1.1 Create a Location Record

Scenario

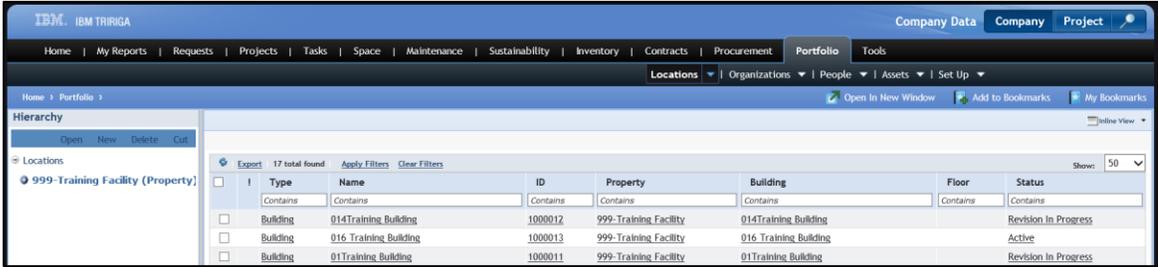
Your department has acquired a new building and a record must be created in TRIRIGA. You will use the Portfolio > Locations portal to create and update the record.

Setup

- ✓ User is logged in to the TRIRIGA Home Page.

Steps

- A. Navigate to the Portfolio > Locations portal landing page.
1. Click the Portfolio tab.
2. Click the Locations option in the sub header to view the Locations Hierarchy page.
3. In the list of Locations on the left, locate and select 999-Training Facility (Property).
4. Observe the list of buildings located at the property.



- B. Create a new Location record.
1. In the Hierarchy section, click New.

- In the list of location types, click **Building**.



- Complete the General section.

- In the **General** tab, in the **Name** field, enter **General ## Training Building**, where ## is your student number.
- In the **Description** field, enter **Temporary use for training**.
- In the **Location Status** section, in the **In Service** field, click the **calendar date lookup**.
- Select **today's date**.
- Click the **Create Draft** action.



- Complete the Primary Address section.

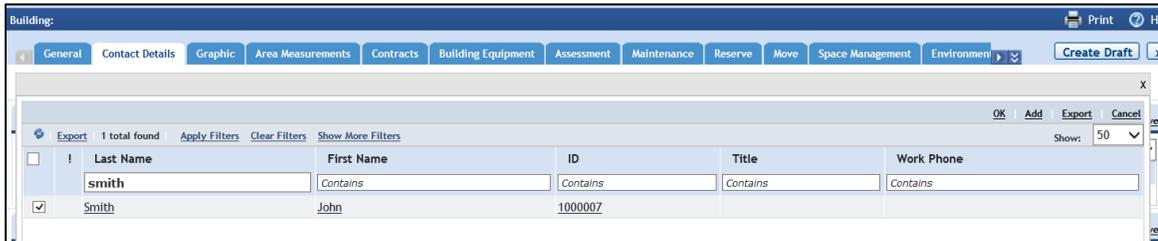
- In the Primary Address section, in the **Address** field, enter **100 East Phoenix Ave.**
- In the **Zip/Postal Code** field, enter **12345**.
- In the **City** field, enter **Phoenix**.
- In the **State/Province** field, enter **AZ**.

Primary Address	
Address	100 East Phoenix Ave.
Zip/Postal Code	12345
Geography Lookup	\Geography\North America\Administration\ADA - Dept of Administration
City	Phoenix
State/Province	AZ
Country	
GIS Latitude	0
GIS Longitude	
Country Code	

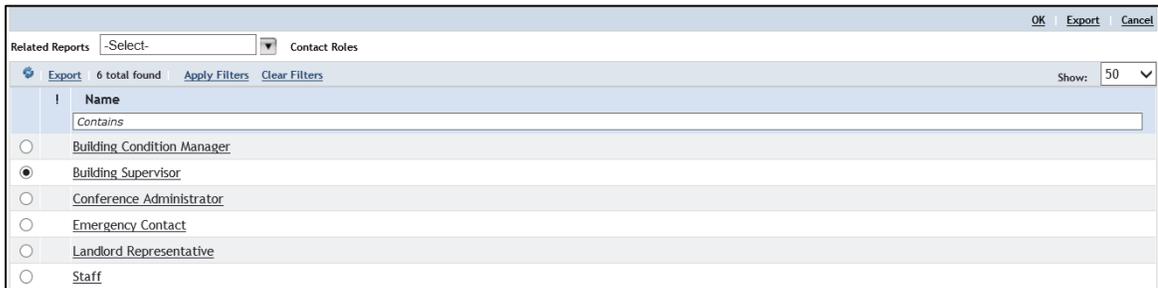
- Complete the Contact Details tab.

- Click the **Contact Details** tab.
- Click the **Add People** action. The Add People window is displayed.

3. In the **Last Name** filter field, enter **Smith**.
4. Press **Enter**.
5. Select the **checkbox** for the record that is displayed.



6. Click the **OK** action. The person is added to the list of Contacts.
7. Click the **Name** of the Person in the Contacts section.
8. In the **Role** section, click the **Find** action. The Role window is displayed.
9. Select the **radio button** for **Building Supervisor**.



10. Click the **OK** action. The role will be added to the contact record.
 11. Click the **Save & Close** action. The Contact Details tab will be updated with the person's role.
- F. Save and Activate the record.

1. Click the **Save** action to save the form.
2. Click the **Activate** action to submit the form for approval.



3. Observe that the new building has a status of **Review In Progress**.
4. When you are finished, click the **Home** tab to return to the Home Page.

2.2. Vehicle/Equipment Specification

In TRIRIGA, Assets are owned or leased items, such as equipment or vehicles, which may be associated with a location. An Asset is a unique instance of an item and each item is associated with a specification that categorizes the asset.

Building Equipment/Vehicle Specifications

Equipment records play a key role in the processing of maintenance work, condition assessment, energy tracking, and more. Vehicles can be tracked as part of an overall fleet management strategy, including reservations, scheduled maintenance, etc. The specification of an item is a description of the item, but does not represent the actual physical equipment.

The Portfolio > Assets portal is used to create and manage specifications. To add a new Building Equipment specification record, from the list of Specifications, click Building Equipment, and then click Add. To add a new Vehicle specification record, click Vehicles from the list of Specifications. When data entry is complete, the Activate action is used to submit the form for approval.

The screenshot shows the TRIRIGA Assets portal interface. At the top, there is a navigation bar with various menu items like Home, My Reports, Requests, Projects, Tasks, Space, Maintenance, Sustainability, Inventory, Contracts, Procurement, Portfolio, and Tools. Below this, there are filters for Locations, Organizations, People, Assets, and Set Up. The main content area displays a table of specifications under the heading 'Building Equipment'. The table has columns for Image, Name, Spec ID, Spec Class, Brand, and Model Number. There are three rows of data:

Image	Name	Spec ID	Spec Class	Brand	Model Number
	01 AC Compressor	EQ-1000024	Air Conditioners	Acme Corporation	xxx123
	01 Electric Utility Meter	EQ-1000035	Utility Meter		
	016 AC Compressor	EQ-1000015	Air Conditioners	Acme Corporation	016123

General

In the General section of the form, enter a Name and a Description. The ID field will be automatically generated if a value is not specified.

The screenshot shows the 'Building Equipment Spec: 01 AC Compressor-EQ-1000024' form. The form has a navigation bar with tabs for General, Details, Products, Inventory, Maintenance, Self Service, Notifications, Notes & Documents, System, Work Flow Instance, Associations, and Audit Actions. The 'General' tab is selected. Below the navigation bar, there is a section for '(Required): General information for Building Equipment Spec.' The 'General' section contains the following fields:

- ID:** EQ-1000024
- Status:** Revision In Progress
- Name:** 01 AC Compressor
- Description:** (Empty text area)

Details

In the Details section, complete the following fields:

- Spec Type
- Spec Class
- Spec Group
- Building System Class
- Service Class

The screenshot shows a 'Details' form with the following fields and values:

- Spec Type: Hard Spec
- Spec Class: Air Conditioners
- Spec Group: (empty)
- Specifier: (empty)
- Specification Order Type: (empty)
- Construction Class: (empty)
- Building System Class: (empty)
- Service Class: Appliances
- Manage Inventory:
- Self Service Request:
- Contains Haz Mat:
- Move Item:

Units

In the Units section, enter values for Currency and Item Units.

Other Sections

The other sections of the form are used when appropriate to store environmental details, manufacturer details, and item cost details.

ACTIVITY 1.2

Create an Equipment Specification Record

Scenario

You need to add a specification to the database for a new piece of equipment. You will use the Portfolio > Assets, New Specification form to create the new record.

Setup

- ✓ User is logged in to the TRIRIGA Home Page.

Steps

- A. Navigate to the Portfolio > Assets portal landing page.
 1. Click the **Portfolio** tab.
 2. Click the **Assets** option in the sub header to view the Assets page.
- B. Create a new Building Equipment specification record.
 1. In the Specifications section click Building Equipment.
 2. Click **Open** in New Window.

3. Click the **Add** action.

The screenshot shows the 'Building Equipment Spec' form. The 'General' tab is active, displaying fields for ID, Status, Name, and Description. The 'Details' tab is also visible, showing fields for Spec Type, Spec Class, Spec Group, Specifier, Specification Order Type, Construction Class, Building System Class, Service Class, Manage Inventory, Self Service Request, Contains Haz Mat, and Move Item.

- C. Complete the General tab on the record.

1. In the **General** section, in the **Name** field, enter **## AC Compressor**, where **##** is your student number.
2. In the **Spec Class** field, click the **magnifying glass** lookup icon.

The screenshot shows the 'Spec Class' field with the value 'Air Conditioners' and a magnifying glass lookup icon.

3. Select **Appliances > Air Conditioners**.
4. In the **Service Class** field, click the **magnifying glass** lookup icon.
5. Select **Facilities > Appliances**.
6. In the **Manufacturer Details** section, in the **Brand** field, click the **magnifying glass** lookup icon.
7. Select **Acme Corporation**.
8. In the **Manufacturer Details** section, in the **Model Name** field, enter **Pressure Flow**.
9. In the **Model Number** field, enter **XX123**.

The screenshot shows the 'Manufacturer Details' section of the form. The 'Brand' field is set to 'Acme Corporation', 'Model Name' is 'Pressure Flow', and 'Model Number' is 'XX123'. The 'List Price' is '5.00 US Dollars' and 'Purchase Units' is 'each'.

- D. Save and Activate the record.

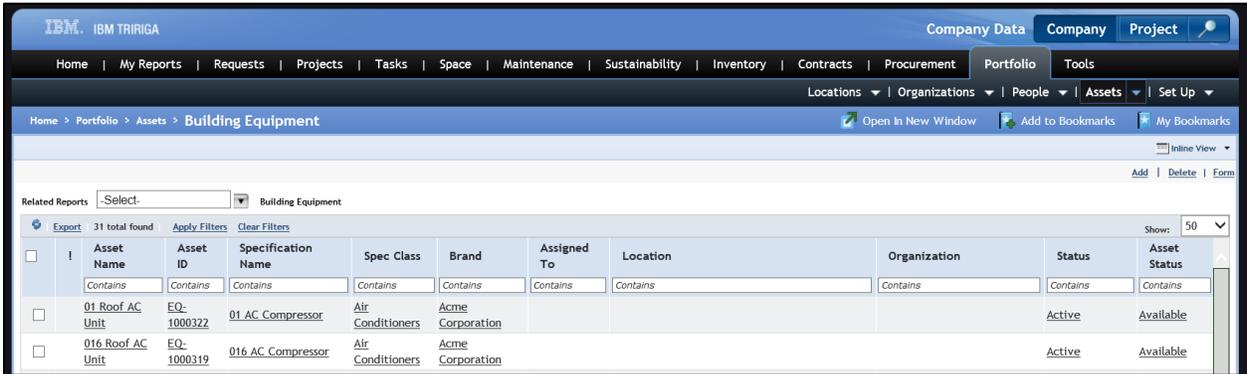
1. Click the **Create Draft** action.
2. Click the **Save** action.
3. Click the **Activate** action.

2.3. Manage Building Systems and Equipment

The management of building systems and equipment is performed in the Portfolio > Assets portal. Once specifications have been defined, they can be assigned to new asset records.

Building Equipment

The Portfolio > Assets portal is used to create and manage Building Equipment. To add a new Building Equipment record, from the list of Assets, click Building Equipment, and then click Add. When data entry is complete, the Activate action is used to submit the form for approval.



General

In the General section of the form, enter a name for the asset record. The ID field will be automatically generated if a value is not specified.

Spec Information

In the Spec Information section, assign a value to the Specification Name field using the lookup icon. Once the specification is assigned, the equipment record automatically infers key information from the specification. These inferred fields include:

- Building System Class
- Currency
- Spec ID
- Brand
- Spec Class
- Model Number
- Description

Details

In the Details section, enter values in the relevant fields, including:

- Serial Number
- Condition
- Organization
- Primary Location

ACTIVITY 1.3

Create a New Building Equipment Record

Scenario

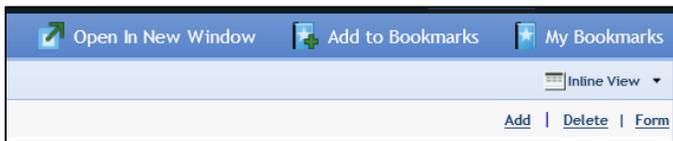
You need to add a building equipment asset to the database for a new piece of equipment. You will use the Portfolio > Assets, New Asset form to create the new record.

Setup

- ✓ User is on the Portfolio > Assets > Building Equipment (Specifications) page.

Steps

- A. Navigate to the Portfolio > Assets portal landing page.
 1. In the breadcrumb navigation feature, click **Assets**.
 2. On the **Assets** page, in the **Assets** section, click **Building Equipment**.
- B. Create a new Building Equipment asset record.
 1. Click the **Add** action.



- C. Complete the General tab on the record.
 1. In the **General** section, in the **Name** field, enter **## Roof AC Unit**, where **##** is your student number.
 2. Click the checkbox for **Reservable**.

3. In the **Spec Information** section, for the **Specification Name** field, click the **magnifying glass** lookup icon.
4. Select the **radio button** for **## AC Compressor**

- Click the **OK** action.

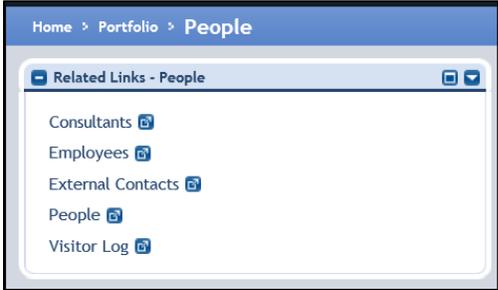
- Enter some optional information about the equipment.
 - Click the **Details** tab.
 - In the **Details** section, in the **BtuH** field, enter **80000**.
 - In the **SEER** field, enter **18**.

- Complete the Reserve tab on the record.
 - In the **General** section, in the **Reserve Calendar** field, click on the **magnifying glass** lookup icon.
 - Select the radio button for the **Default Reservation Calendar**.
 - Click the **OK** action.
 - In the **Usage Units** field, click the dropdown arrow and select **Hour**.
 - In the **Usage Cost** field, enter **50**.

- Save and Activate the record.
 - Click the **Create Draft** action.
 - Click the **Save** action.
 - Click the **Activate** action.

Assign Assets/Equipment to Employee

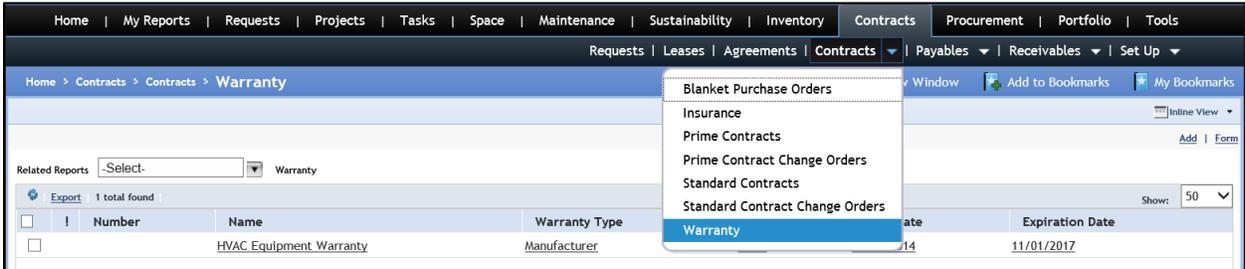
Upon completion of the asset record, individual assets and equipment can be assigned to an employee in the Portfolio > People > Employees list. Once the Employee record is located and opened, the Locations/Assets tab is used to add equipment assigned to the person. Equipment can also be assigned via a work task or on the equipment record. This process will be covered in a later section.



Track Equipment Warranties

During the performance of maintenance activity, it may be necessary for maintenance team members to reference maintenance warranty information, including warranty status, dates, and other information related to the maintenance of the asset record. Warranty records can be assigned to either building records or asset/equipment records.

The Contracts portal, Warranty menu is used to view a list of warranty records. A new warranty record is created by clicking the Add action.



General Tab

The required fields on the warranty record include:

- Name
- Description
- Warranty Type
- Contract Type
- Provider Type
- Start Date
- Expiration Date

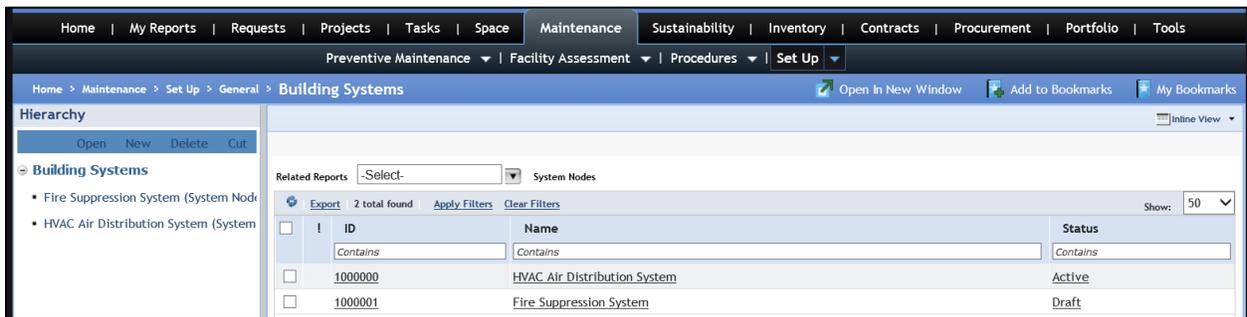
- Warranty Service Provider

Assets and Locations Tab

The Assets and Locations tab is used to define the scope of the warranty. Assets and Locations can be added using the Find action and locating the record to associate with the warranty record.

Manage Building Systems

Assets can be defined to track any type of equipment. Each asset record can be assigned to a building system, which provides the context for the relationship between the asset and the building where it is installed. For example, a generator asset may be assigned to the Electrical system of a specific location. Building systems are a key part of the condition assessment process. Only authorized users have the ability to create Building System records.



Manage Asset Lease

TRIRIGA provides the ability to assign an ownership status (Leased or Owned) to an asset record in the Asset Status section. Leased assets can be assigned to an Asset Lease Contract. Asset Lease records are created using the Contracts > Leases portal and clicking the Add action in the My Asset Leases section.

General Tab

On the General tab, enter a Name, Description, Commencement Date, and Expiration Date.

The screenshot shows the 'Asset Lease' form in the 'General' tab. The form is divided into several sections: General, Units, Details, Critical Dates, and Lease Notifications. The 'General' section includes fields for ID, Revision (0), Status, Date (04/27/2015), Name, Description, and Legal Name. The 'Units' section includes Currency (US Dollars), Conversion Group (Default), Asset Units (Quantity), and Currency Exchange Date (04/27/2015 15:15:36). The 'Details' section includes Lease Type, Lease Category, Base Lease Rate (5.00 US Dollars), Lease Base Year (0), Escalation Cap % (0 percent), Deposit (5.00 US Dollars), Late Fee Type, Late Fee Flat Amount (5.00 US Dollars), Late Fee Flat Rate % (0 percent), Accounting Type (Accounts Payable (AP)), and Payment Timing (Payment in Advance). The 'Critical Dates' section includes Commencement Date, Base Lease Expiration Date, Inception (Execution) Date, Legal Notice Date, Original Commencement Date, Original Expiration Date, Lease Term (0), Expiration Reminder (6 Months), Abstracted Date, Legal Notice Reminder (6 Months), and Returned Date. The 'Lease Notifications' section shows 0 total found and a table with columns for Notification, Deadline, Name, Notification Type, Notify Role, and Status. The table is currently empty with the text 'No data to display'.

Contact Details Tab

On the Contact Details tab, assign a person to the defined Contract Administrator role by clicking the role name and selecting a person from the list.

The screenshot displays the 'Asset Lease' window with the 'Contact Details' tab selected. At the top, there are navigation tabs: General, Contact Details, Assets, Clauses, Options & Terms, Payments, Accounting, and History. A 'Create Draft' button is visible in the top right. Below the tabs, a message states: '(Required): Provide information about Asset Lessee, Asset Lessor, and other contacts.'

The 'Contacts' section shows a table with the following columns: Role, Person, Work Phone, Fax, Email, and Primary Organization. One row is listed with the role 'Contract Administrator'. To the right of the table are 'Add People' and 'Remove' buttons, and a 'Show: 10' dropdown menu.

Below the contacts table are two sections: 'Asset Lessee' and 'Asset Lessor'. Each section contains multiple input fields for details such as Organization, Legal Name, Address, City, State/Province, Zip/Postal Code, Country, Contact Name, Contact Work Phone, Contact Fax, Contact Email, and Customer/Vendor Number.

Assets Tab

On the Assets tab, assign one or more assets to the lease using the Find action on the Leased Assets section.

The screenshot shows the 'Leased Assets' section. At the top right, there are 'Find' and 'Remove' buttons, and a 'Show: 50' dropdown menu. Below this is a table header with the following columns: Image, ID, Name, Spec Class, Ownership Status, Ownership Status Color, Asset Status, Asset Status Color, and Record Status. The table body is empty, with the text 'No data to display' shown below the header.

Complete any other relevant details for the Asset Lease, including the Lease Terms and Scheduled Payments. When data entry is complete, Save and Activate the record.

Manage Keys

The Key Security Manager in TRIRIGA enables an organization to define key security for all the locations in the organization’s portfolio. The key management tools are used to create a user-defined hierarchy of key security levels and store the security information required to create new keys.

Asset Name	Asset ID	Key Cut	Key Level	Spec ID	Spec Class	Assigned To	Organization	Location	Status	Asset Status
999 Training Key 001	1000000			KEY-10140	Key Specification				Active	Available
999 Training Key 002	1000001			KEY-10137	Key Specification				Active	Available

Keys have a specification record and an asset record. Key specification records are managed in the Assets > Keys portal. New key asset records can be created by clicking the Add action from the Keys page in the Specifications section.

Key asset records are stored in a hierarchy in the Inventory > Manage Keys portal that uses nodes to manage the levels of key security. The following types of keys can be created:

- Great Great Grand Master Key
- Great Grand Master Key
- Grand Master Key
- Master Key
- Change Key
- Sub Master Key
- Specialty Key

2.4. Manage Utility Data

Utility meters are used to track energy consumption data for locations. The process of managing utility data requires the setup of utility meter specifications, setup of asset meters and allocations, and the data entry of energy consumption information.

Setup Utility Meter Specifications

The first step in the utility management process is to create a utility meter specification. It is recommended to use the Building Equipment specification form to create and track utility meter equipment.

The screenshot shows the 'Building Equipment Spec: 01 Electric Utility Meter-EQ-1000035' form. The interface includes a top navigation bar with tabs for General, Details, Products, Inventory, Maintenance, Self Service, Notifications, Notes & Documents, System, Work Flow Instance, Associations, and Audit Actions. Below the tabs, there are buttons for 'Revise', 'More', and 'X'. The main content area is divided into two sections: 'General' and 'Details'.
General Section:
 - ID: EQ-1000035
 - Status: Active
 - Name: 01 Electric Utility Meter
 - Description: (empty field)
Details Section:
 - Spec Type: Hard Spec
 - Spec Class: Utility Meter
 - Spec Group: (empty field)
 - Specifier: (empty field)
 - Manage Inventory:
 - Self Service Request:
 - Specification Order Type: (empty field)
 - Construction Class: (empty field)
 - Building System Class: (empty field)
 - Service Class: Electrical
 - Contains Haz Mat:
 - Move Item:

In this case, a Building Equipment specification is created following the steps outlined in Lesson 4.2. The Spec Class value of Utility Meter can be found under Instrumentation and Controls in the class hierarchy.

For a utility meter, the Item Units field should match the units measured by the meter.

Once data entry is complete, Save and Activate the specification.

Setup Asset Meters and Allocations

The next step in the utility management process is to create the asset record to support the tracking and setup of utility meters. Meters can be allocated across and within buildings and other locations.

In this case, a Building Equipment asset record is created, beginning with the steps outlined in Lesson 2.3. Some additional steps are necessary to complete the Asset meter record.

Once the Specification Name field has been completed using the lookup icon, the equipment record will infer the other key information from the specification.

Building Equipment: EQ-1000333-Meter 01

General | Contacts | Details | Graphics | Contracts | Assessment | Maintenance | History | Notifications | Notes & Documents | System | Cd

Email: _____ Address: _____
 Zip/Postal Code: _____ City: _____
 State/Province: _____ Country: _____
 Cost Code: _____

Units

Currency: US Dollars

Spec Information

* Specification Name: 01 Electric Utility Meter
 Spec ID: EQ-1000035 Spec Class: Utility Meter
 Brand: _____ Model Number: _____
 Description: _____

Details

In the Details section enter values for the relevant fields for the meter, including the following:

- Serial Number
- Condition
- Organization
- Primary Location

Details

Serial Number: xxx1234 Asset Acquisition Method: _____
 Bar Code Entry: _____ Control Number: EQ-1000333
 Condition: Excellent Building System Class: _____
 Reservable:
 Maintenance Priority: _____
 Organization: \Organizations\State of Arizona\ADA
 Primary Location: _____

Meter Service Allocations

The Meter Service Allocations tab is located on the Building Equipment record Maintenance tab. This tab is used to allocate a meter across more than one location. For example, a Meter may have two locations assigned at 100% service which means that one meter reports data from both locations. And, multiple meters can service one location, for example, two meters assigned at 50% to a single location.

Meter Service Allocations Add | Remove

Export 2 total found Apply Filters Clear Filters

Service Location	Service Allocation Percent
Contains	
<input type="checkbox"/> 014Training Building	100 percent
<input type="checkbox"/> 01Training Building	100 percent
	200 percent

Enter or select values for the Service Allocation Percent and Service Location fields.

When data entry is complete, Save and Activate the equipment asset record.

Enter Energy Consumption Data

The next step in the utility management process is entering the amount and cost of energy consumed per utility meter into TRIRIGA. It is assumed that TRIRIGA is only used for historical reporting and analysis of utility invoices and not for processing of utility invoice payments. Utility payments are processed in AFIS.

Utility invoice data is entered in the Sustainability > Utility Invoices portal. The user can click the Add button to create a new Invoice record.

The screenshot displays the 'Utility Invoices' section of the TRIRIGA Sustainability portal. The main content area is divided into two panels:

- Utility Invoices Pending Approval:** This panel is currently empty, displaying 'No data to display.' It includes action buttons: Approve, Reassign, Request Clarification, Return, and Escalate.
- Utility Invoice History:** This panel contains a table listing historical utility invoices. The table has columns for ID, Date, Name, and Status. Below the table are 'Add' and 'Invoice Manager' buttons.

ID	Date	Name	Status
1000000	12/09/2014	Invoice 999	Revision In Progress
1000001	12/15/2014	Invoice 15	Issued
1000002	12/15/2014	Invoice 02	Issued
1000003	12/15/2014	Invoice 06	Issued
1000004	12/15/2014	Invoice 01	Issued
1000005	12/15/2014	Invoice 07	Issued
1000006	12/15/2014	Meter 14	Draft
1000007	12/15/2014	Invoice 10	Issued
1000008	12/15/2014	Invoice05	Completed
1000009	12/15/2014	Invoice 03	Issued

General

In the General section, enter a Name and select a currency (the default is US Dollars).

Utility Invoice: Add To Bookmarks Print Help

General Line Items Utility Logs Notifications Notes & Documents System Work Flow Instance Create Draft X

(Required): Create a Utility Bill Invoice by selecting a Contract and record the amount to be paid for each line item.

General

ID	Revision	0	Status
----	----------	---	--------

* Name Invoice Date 04/19/2015

Description

Units

Currency US Dollars

Details

Response Required

Conversion Group Default Currency Exchange Date 04/19/2015 18:34:39

Invoice Summary

Total Invoice Amount	\$0.00	US Dollars
Total Previous Invoices	\$0.00	US Dollars
New Invoice Total	\$0.00	US Dollars

Contract Find | Clear

ID	Status	
Name	Revision	0

Contract Type

To

To Lookup

First Name Last Name

* Organization

Line Items

On the Line Items tab, click the Add action to display the Utility Invoice Line Item form.

The screenshot displays the 'Utility Invoice Line Item' form with the following sections and fields:

- General:** Name, Status
- Units:** Currency (US Dollars), Quantity UOM (Quantity), each
- Details:**
 - Line Number: 1
 - Date: 04/19/2015
 - Utility Bill Type: Energy
 - Meter Name: [Searchable]
 - Energy Type: [Searchable]
 - Energy Source: [Searchable]
 - Include In Energy Use?:
 - Cooling Degree Days: 0
 - Renewable Source?:
 - Heating Degree Days: 0
 - Billing Period: [Searchable]
 - Peak Load: 0 each
 - From Date: [Searchable]
 - To Date: [Searchable]
 - Current Reading: 0 each
 - Previous Reading: 0 each
- Meter Service Allocations:** Add | Remove, 0 total found. Table with columns: Service Location, Service Allocation Percent. No data to display.
- Cost Details (This Invoice):**
 - Quantity: 0 each
 - Rate: 5.00 US Dollars
 - Total: 5.00 US Dollars
- Invoiced Totals:**

Prev Invoiced Quantity	0	New Invoiced Quantity	0
Prev Invoiced Total	5.00 US Dollars	New Invoiced Total	5.00 US Dollars
- Budget Code:** Cost Code ID, Cost Code Name, Find | Clear

Utility Invoice Line Item Details

On the Utility Invoice Line Item form, in the Details section, complete the following fields:

- Name
- Date
- Utility Bill Type
- Meter Name
- Energy Type

- Billing Period
- From Date
- To Date
- Quantity UOM
- Current Reading
- Previous Reading

The Meter Name field provides a lookup icon that can be used to select the meter asset that was created to track usage.

Cost Details

In the Cost Details section, enter values for the Quantity and Rate fields. Also, assign a budget code value if needed. Budget codes must be set up in the Organization Cost Code hierarchy prior to assigning to a utility invoice.

Cost Details (This Invoice)		
★ Quantity	<input type="text" value="5000"/>	each
Rate	<input type="text" value="5.05"/>	US Dollars
Total	\$250.00	US Dollars

Create and Issue

When data entry is complete for the Utility Invoice record, click Create to save the record, then click Issue. If approved, the record will appear in the results page with a status of Active.

ACTIVITY 1.4

Manage Utility Meter Data

Scenario

You want to track the consumption of energy for a location record using meter data. You will configure the meter specification, assign the specification to an asset and then enter the energy usage data.

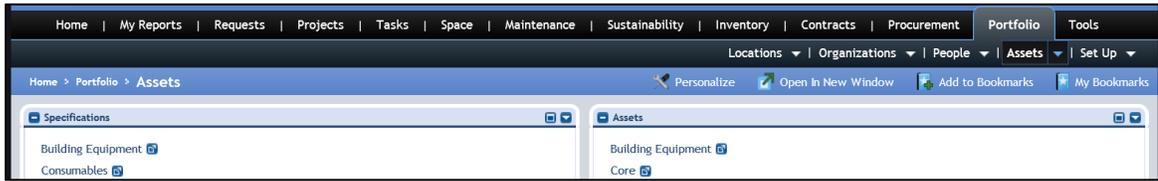
Setup

- ✓ User is on the Portfolio > Assets > Building Equipment page.

Steps

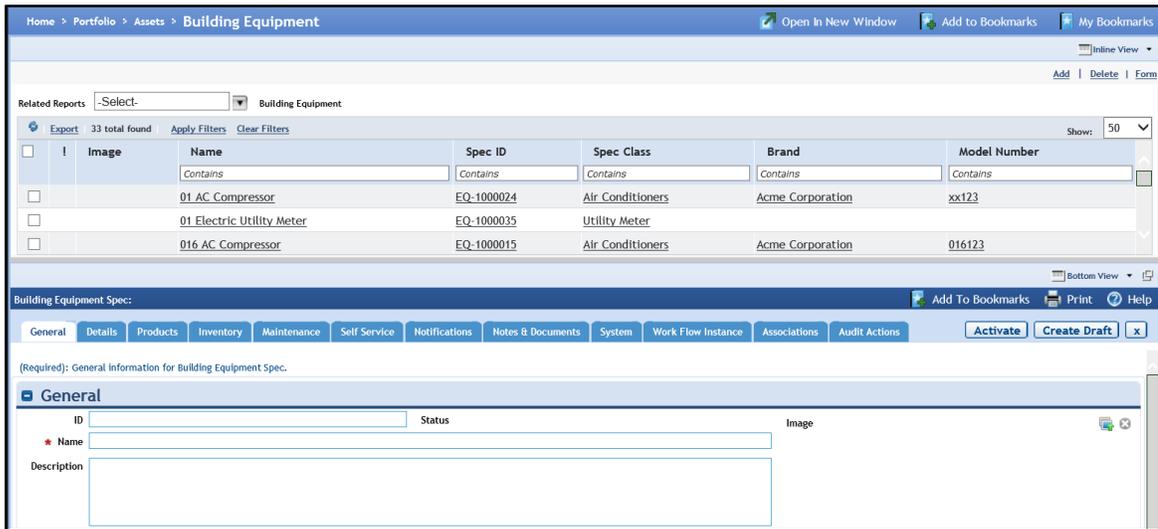
- A. Navigate to the Portfolio > Assets portal landing page.
 1. Click the **Portfolio** tab.

2. Click the **Assets** option in the sub header to view the Assets page.



- B. Create a new Building Equipment specification record.

1. In the **Specifications** section, click **Building Equipment**.
2. Click the **Add** action.



- C. Complete the General tab on the record.

1. In the **General** section, in the **Name** field, enter **## Electric Utility Meter**, where **##** is your student number.
2. In the **Details** section, for the **Spec Class** field, click the **magnifying glass** lookup icon.
3. Select **Instrumentation and Controls > Utility Meter**.
4. For the **Service Class** field, click the **magnifying glass** lookup icon.
5. Select **Facilities > Electrical**.
6. In the **Units** section, in the **Item Units** field, click the **dropdown** and select **Energy**.
7. Click the **Measurement** dropdown and select **kilowatt-hours**.

8. Click the **Activate** action to save and close the record.

The screenshot shows the 'Building Equipment Spec' form with the following sections:

- General** (selected): Includes fields for Spec Type (Hard Spec), Spec Class (Utility Meter), Spec Group, Specifier, Manage Inventory, and Self Service Request.
- Details**: Includes Specification Order Type, Construction Class, Building System Class, and Service Class (Electrical).
- Environmental Details**: Includes Energy Rating Type, Overall Product Rating, and Energy Rating Value (0).
- Spec Class Data Attributes**: A table with columns for Name, Value, and Units. It currently shows 'No data to display'.
- Units**: Includes Currency (US Dollars) and Item Units (Energy, kilowatt-hours).

D. Create a new Building Equipment asset record.

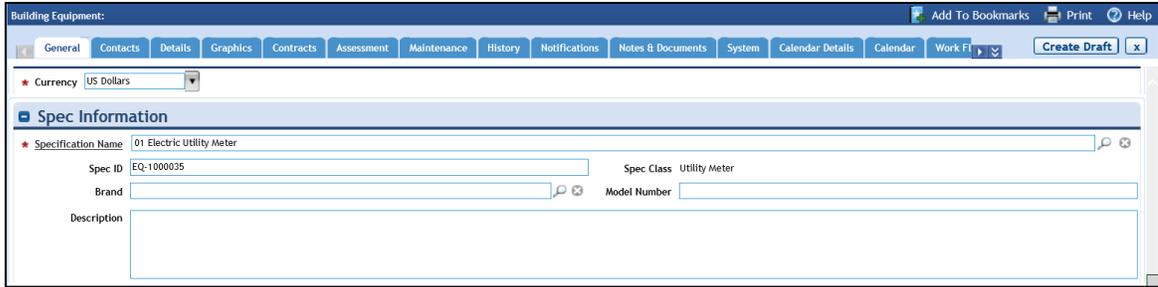
1. In the breadcrumb navigation feature, click **Assets**.
2. In the **Assets** section, click **Building Equipment**.
3. Click the **Add** action.

The screenshot shows a table of Building Equipment assets with the following data:

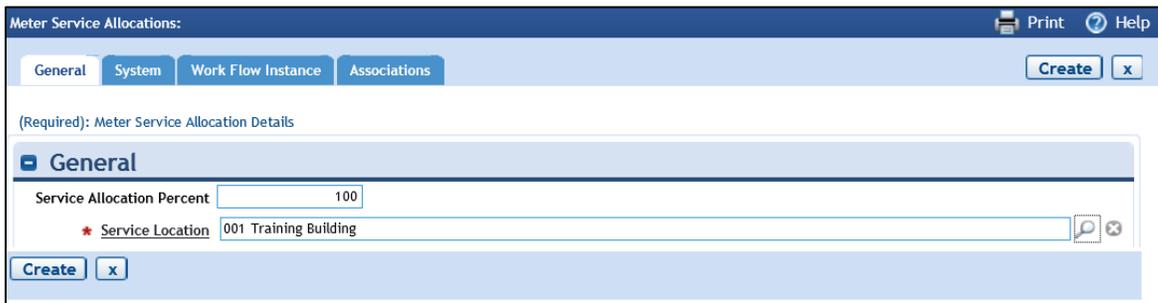
Asset Name	Asset ID	Specification Name	Spec Class	Brand	Assigned To	Location	Organization	Status	Asset Status
01 Roof AC Unit	EQ-1000322	01 AC Compressor	Air Conditioners	Acme Corporation				Active	Available
016 Roof AC Unit	EQ-1000319	016 AC Compressor	Air Conditioners	Acme Corporation				Active	Available

E. Complete the General tab on the record.

1. In the **General** section, in the **Name** field, enter **## Meter**, where **##** is your student number.
2. In the **Details** section, for the **Serial Number** field enter **XX1234**.
3. In the **Organization** field, click the **magnifying glass** lookup icon.
4. Select the **radio button** for **\Organizations\State of Arizona\ADA**.
5. Click the **OK** action.
6. In the **Spec Information** section, for the **Specification Name** field, click the **magnifying glass** lookup icon.
7. Select the **radio button** for the **## Electric Utility Meter** created in the previous step.
8. Click the **OK** action.
9. Click the **Create Draft** action.

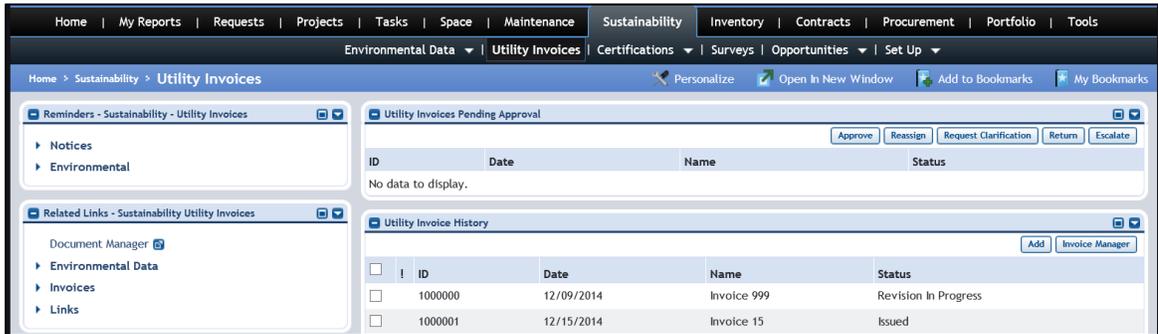


- F. Navigate to the Maintenance tab on the record.
 1. Click the **Maintenance** tab.
 2. Click on the **Meter Service Allocations** tab.
 3. Click the **Add** action.
 4. In the **Service Allocation Percent** field, enter **100**.
 5. In the **Service Location** field, click the **magnifying glass** lookup icon.
 6. Select the **radio button** for the building that you created in activity 3.1.
 7. Click the **OK** action.



8. Click the **Create** action.
9. Click the **Save** action.
10. Click the **Activate** action.
- G. Navigate to the Sustainability > Utility Invoices portal.
 1. Click the **Sustainability** tab.
 2. Click the **Utility Invoices** option in the sub header to view the Utility Invoices landing page.

3. In the **Utility Invoice History** section, click the **Add** action.



H. Complete the Utility Invoice record.

1. On the **General** tab, in the **General** section, in the **Name** field, enter **## Invoice**, where **##** is your student number.
2. In the **Organization** field, click the **magnifying glass** lookup icon to display the lookup page.
3. Select the **radio button** for **\Organizations\State of Arizona\ADA**.

4. Click the **OK** action.

Utility Invoice: Add To Bookmarks Print Help

General Line Items Utility Logs Notifications Notes & Documents System Work Flow Instance Create Draft X

(Required): Create a Utility Bill Invoice by selecting a Contract and record the amount to be paid for each line item.

General

ID Revision 0 Status

* Name 01 Invoice Invoice Date 04/19/2015

Description

Units

Details

Invoice Summary

Contract Find Clear

To

To Lookup

First Name Last Name

* Organization \Organizations\State of Arizona\ADA

Address

Zip/Postal Code

City

State/Province Country

5. Click the **Line Items** tab.

6. Click the **Add** action.

Utility Invoice: Add To Bookmarks Print Help

General Line Items Utility Logs Notifications Notes & Documents System Work Flow Instance Create Draft X

(Optional): Create Line Items for the Utility Invoice.

Line Items Add Remove

I. Complete the Utility Invoice Line Item record.

1. In the **Details** section, in the **Date** field, enter today's date.
2. In the **Energy Type** field, click the **magnifying glass** lookup icon.
3. Select **Scope 2 > Electricity**.
4. In the **Billing Period** field, click the **magnifying glass** lookup icon.

- 5. Select the **current month**.
- 6. In the **Meter Name** field, click the **magnifying glass** lookup icon.
- 7. Select the meter asset that was created in the previous step.
- 8. Click the **OK** action.
- 9. Select the checkbox for **Include in Energy Use?**
- 10. In the **Cost Details (This Invoice)** section, in the **Quantity** field, enter **3500**.
- 11. In the **Rate** field, enter **.05**.
- 12. Click the **Create** action.

The screenshot shows the 'Utility Invoice Line Item' form with the following sections and values:

- General:** Name (empty), Status (empty).
- Units:** Currency US Dollars, Quantity UOM Energy, kilowatt-hours.
- Details:** Line Number 1, Date 04/19/2015, Utility Bill Type Energy, Meter Name Meter 01, Energy Type Electricity, Energy Source Scope 2 (Indirect), Cooling Degree Days 0, Heating Degree Days 0, Billing Period 2015 - 04 - April, From Date 04/01/2015, To Date 04/30/2015, Current Reading 0 kilowatt-hours, Previous Reading 0 kilowatt-hours.
- Cost Details (This Invoice):** Quantity 3500 kilowatt-hours, Rate 5.05 US Dollars, Total \$175.00 US Dollars.

- J. Issue the Utility Invoice record.
 - 1. In the **Utility Invoice** form, click the **Create Draft** action.
 - 2. Click the **Issue** action.

The screenshot shows the 'Utility Invoice: 1000013-0-01 Invoice' form with the following table:

Line No.	Meter Name	Utility Type	Quantity	Rate	Total	Prev Invoice Total
1	Meter 01	Energy	3500 kilowatt-hours	\$.05	\$175.00	\$175.00
					\$175.00	\$175.00

3. Click the **Home** tab to return to the Home Page.

2.5. Create Corrective Maintenance Work Task

TRIRIGA supports the creation and tracking of multiple request types. Corrective maintenance work tasks are issued upon request, either by using the self-service functions in TRIRIGA or after being received over the phone. Corrective Maintenance Work Tasks can also be created directly by a user with appropriate access.

Some of the request types that TRIRIGA supports include:

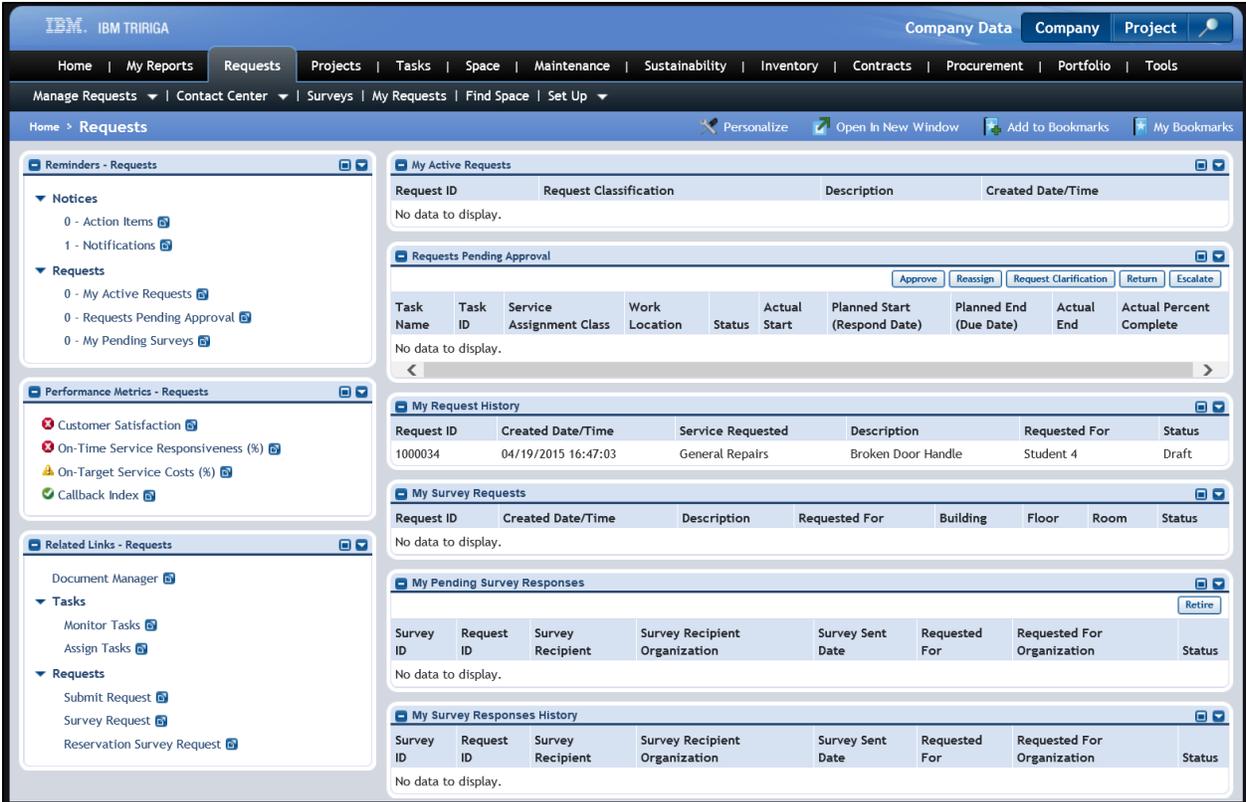
- Electrical and Lighting
- Equipment Service
- Exterior Services
- Fixture and Furniture
- General Repairs
- Housekeeping
- Interior Services
- Key Request
- Plumbing and Leaks
- Security
- Temperature

This lesson focuses on General Repair requests with the understanding that all requests are similar in nature but with minor specific differences in the details that pertain to the specific request type.

Submit Online Request

The Requests portal is used to issue, manage, and track the various requests for corrective maintenance in TRIRIGA. Users can create self-service requests for a variety of repairs and services.

In the Requests Portal, the Submit Request action in the Related Links – Requests section will display the types of requests that can be created. Selecting the type of request from the menu on the left will create the form used to complete the request. In this lesson, the focus is a General Repair request.



General Repairs

In the General Repairs form, select who the request is for, either Me or Someone Else. For Someone Else enter the contact information for the person the request is for.

(Instruction): To submit a General Repairs request, complete the form below then click Submit.

★ Request is for Me Someone Else

Request Details

In the Request Details section, check the Emergency box if immediate service is required. Then enter the Building, Floor, Room, and Organization values as appropriate for the request.

Request Details Select From Floor Plan

Emergency, immediate service required

★ Building

Floor

Room

★ Organization

Describe Your Request

Enter a description of the repairs or issue in the Describe Your Request section.

Other Sections

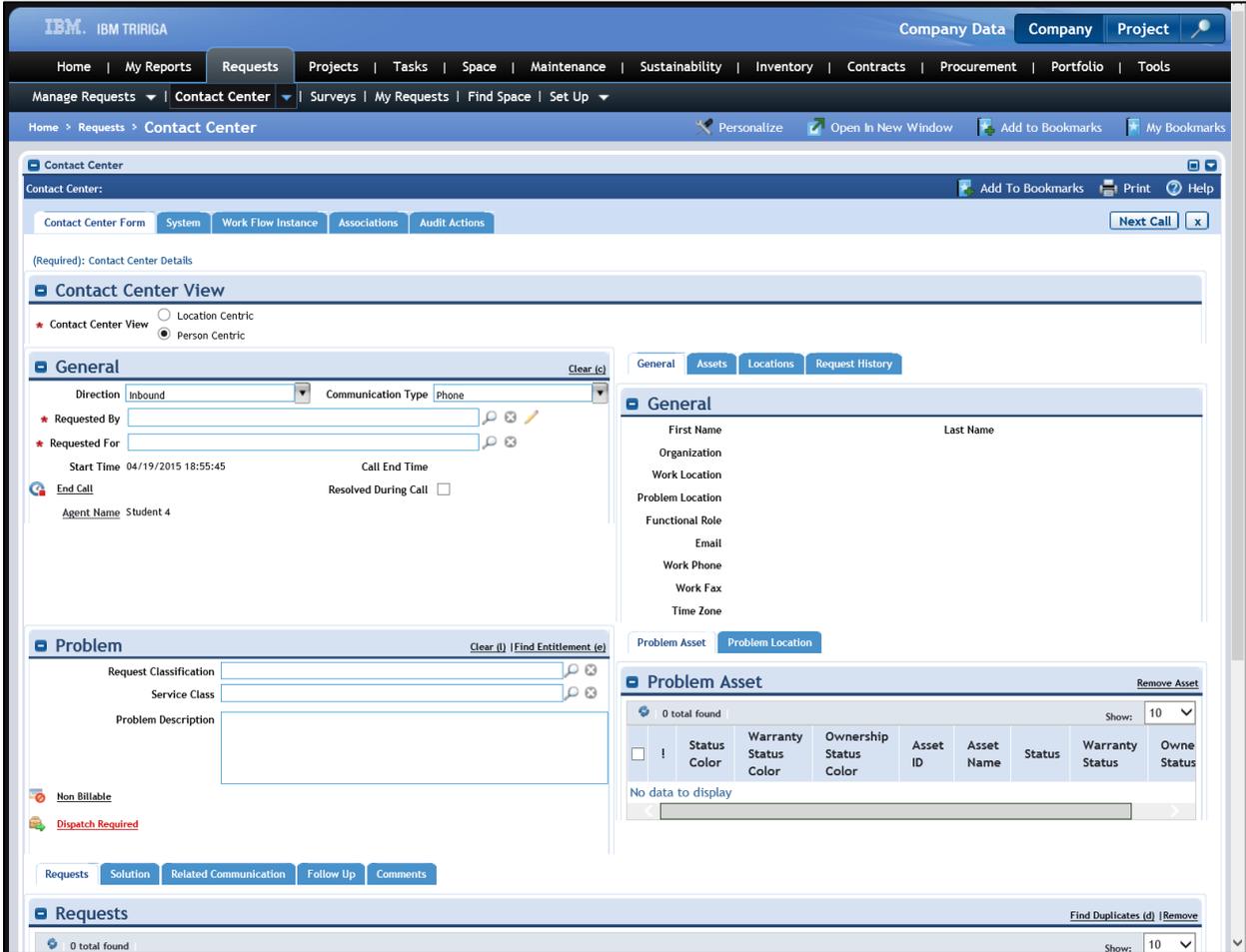
If the request is applicable to more than one Location, add locations by selecting the Find action. Select any Assets that the request is associated with. Enter any additional information in the Comments section and attach any documentation using the Upload action in the Related Documents section.

Save and Submit

When data entry is complete, the Create Draft button is used to save the request and the Submit button is used to submit the request. Users will see the status of their request in the Manage Requests portal. Requests will be listed in the My Request History section.

Receive Request by Phone

The Requests > Contact Center is used to record requests received by phone, email or other offline communication. On the Contact Center form, a call center user completes the necessary information for the request and then clicks Quick Add to create the request then clicks Next Call to submit the request.



Contact Center View

In most cases, the Contact Center View should be left as the default Person Centric which will configure the form to logically record data entry based on a person making the request.

General

In the General section enter values for Requested By and Requested For (if not the same). Both fields are required and the Requested For field will inherit the value from the Requested By field. These fields also populate the content of the General and Primary Location sub-menus. Select a Communication Type from the list, Fax, Mail, or Phone.

Problem

In the Problem section, complete the following fields:

- Request Classification
- Service Class
- Problem Description

The assigned Request Classification will determine the Service Plan used for routing the request.

Locations

In the Locations sub-menu, assign any locations related to the request by selecting from the available items in the list. Click the radio button to add a location to the request record.

Assets

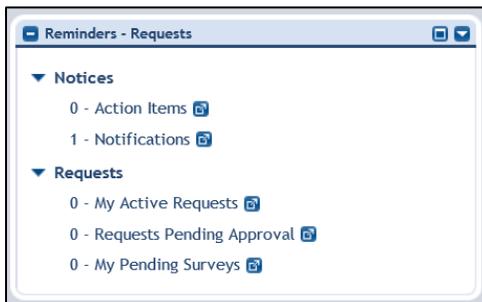
In the Assets sub-menu, assign any assets related to the request by selecting from the available items in the list. Click the radio button to add an asset to the request record.

Submit the Request

Clicking Quick Add action will create the request and clicking Next Call will submit the request. Requests created by the Contact Center form behave the same as requests created in Request Central using the self-service form to generate a work order or a project, as appropriate to solve the request, but there is no approval required in the workflow.

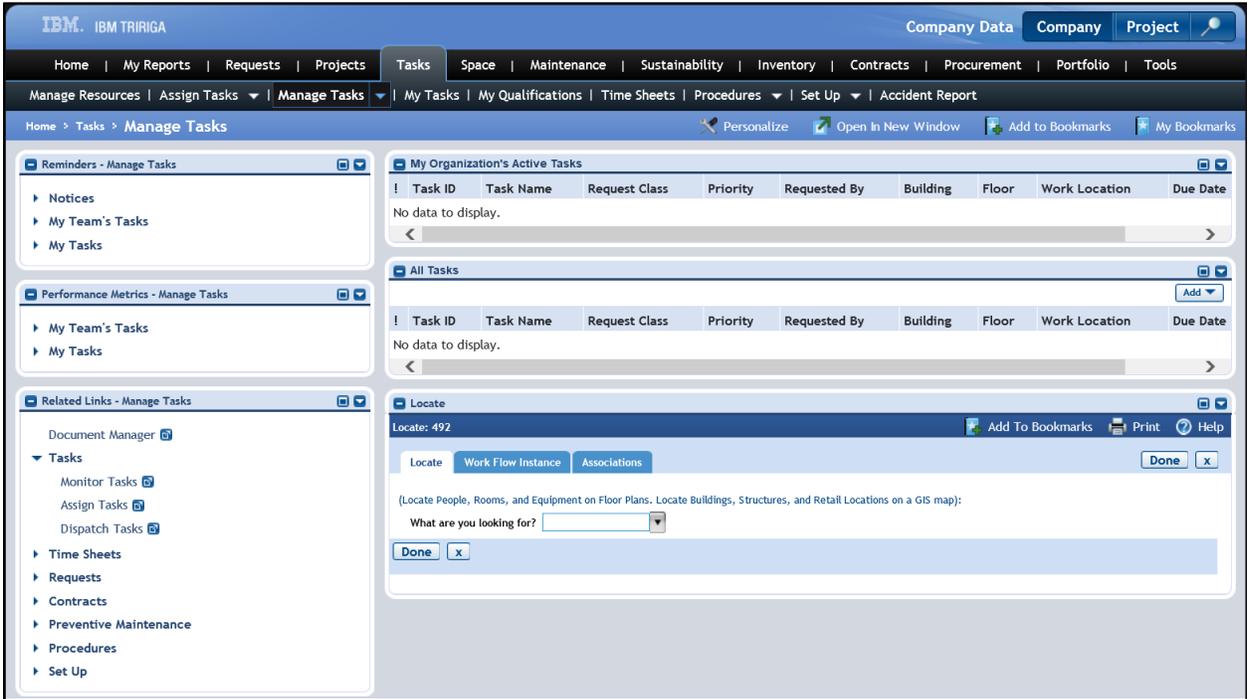
Review Request

A facilities manager should review requests before creating work tasks. Requests can be reviewed in the Notices > Notifications page in the Reminders section of the Requests page. In the Actions section, managers can approve, escalate, or reassign the request. They can also request clarification for the request. After review, if the request is valid, the manager can approve the request. If necessary, a comment can also be entered for the approval.



Create Work Task

When a Work Request is approved, an associated Work Task is created. Work Tasks are automatically created with the information from the Work Request. Work Tasks can be viewed in the Tasks > Manage Tasks portal using the Work Tasks option. Work Tasks can be filtered and sorted to find desired tasks. Clicking on a task will display the details of the task for review.



ACTIVITY 1.5

Create Corrective Maintenance Work Task

Scenario

You need to create a work task for a general repair in TRIRIGA. You will create the corrective maintenance request in the Requests portal and then create a work task to perform the repairs.

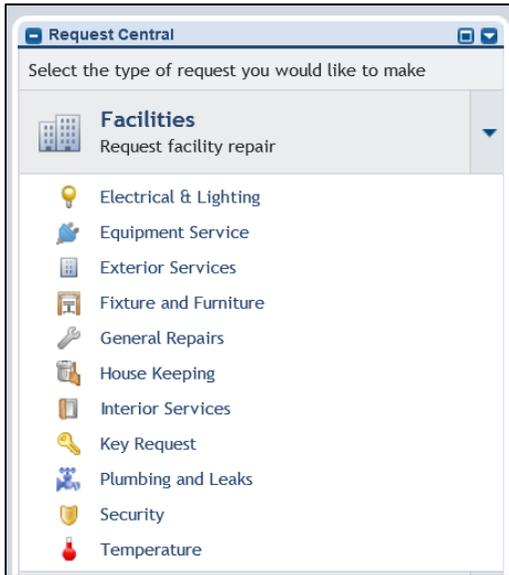
Setup

- ✓ User is logged in to the TRIRIGA Home Page.

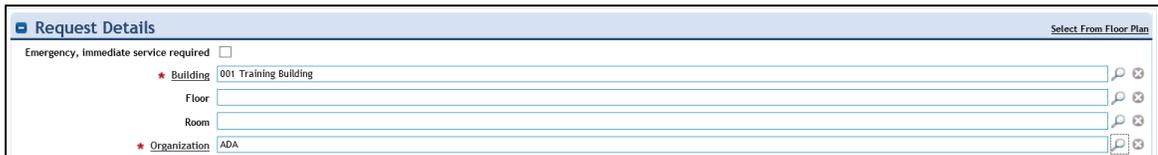
Steps

- A. Navigate to the Requests > Manage Requests portal.
 1. Click the **Requests** tab.

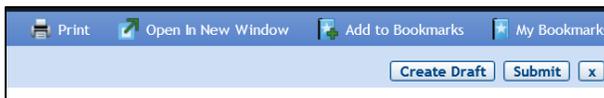
- In the **Request Central** section, expand **Facilities** and click **General Repairs**.



- Complete the General Repair request form, Request Details section.
 - In the **Request Details** section, in the **Building** field, click the **magnifying glass** lookup icon.
 - Click in the **Name** filter field.
 - Click **Enter**. All possible values will be displayed in the list.
 - Select the **radio button** for the **Training Building** you created earlier.
 - Click the **OK** action.
 - In the **Organization** field, click the **magnifying glass** lookup icon.
 - Select the **radio button** for **ADA**.
 - Click the **OK** action.



- Complete the rest of the request.
 - In the **Service Request** section, select the **radio button** for **Elevator**.
 - In the **Describe Your Request** section, in the text box, enter **## The elevator will not stop at floor 13, where ## is your student number.**
 - Click the **Submit** action.



D. Review the request.

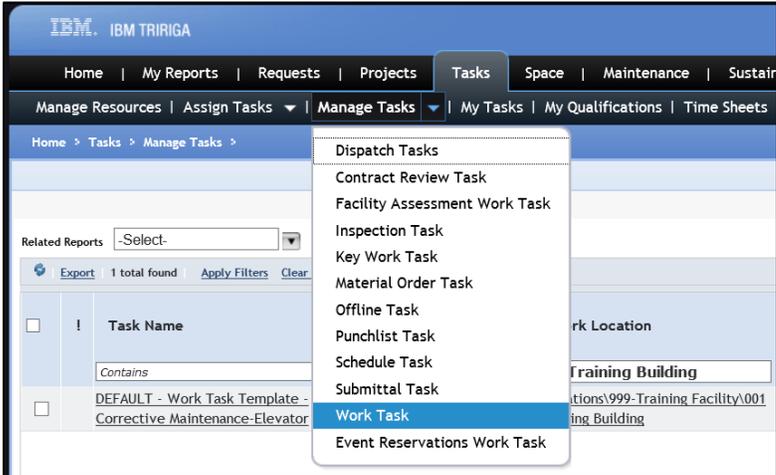
1. On the **Manage Requests** page, in the **My Request History**, observe the request has been created.
2. Confirm notification in user **Home** portal that request has been received.



E. Approval of the request generates the Work Task.

F. Locate and review the Work Task.

1. Navigate to the **Tasks** landing page.
2. Click the drop down menu for **Manage Tasks**.
3. Click **Work Task**.



4. Filter the results by entering **General ## Training Building**, where **##** is your student number, in the **Work Location** field.



5. Click on the task to open it and confirm it created properly.

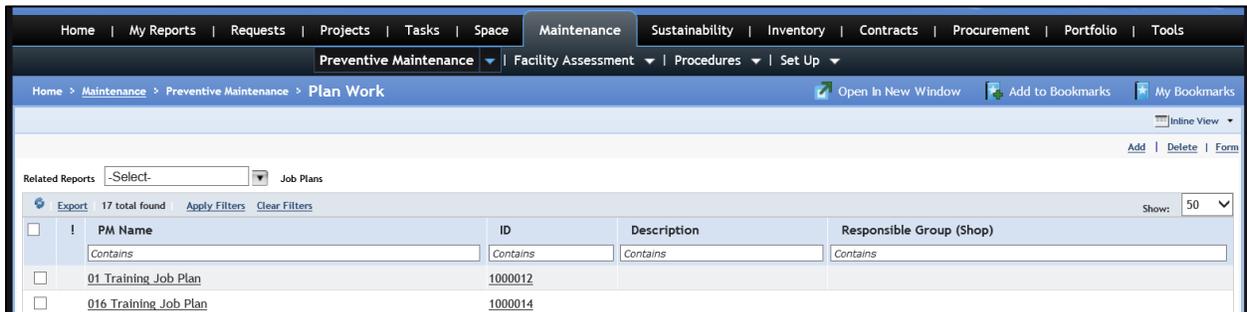
2.6. Create Preventative Maintenance Work Task

Preventative maintenance is work performed on a defined schedule rather than when something breaks. A job plan is the primary record in the preventative maintenance process that defines who is responsible for the work to be performed and identifies the building systems, assets, and locations that will be serviced, also referred to as the scope.

Setup Preventative Maintenance Job Plan

The Maintenance portal is used to create and manage preventative maintenance job plans. Once a job plan is created it can be used to generate work tasks.

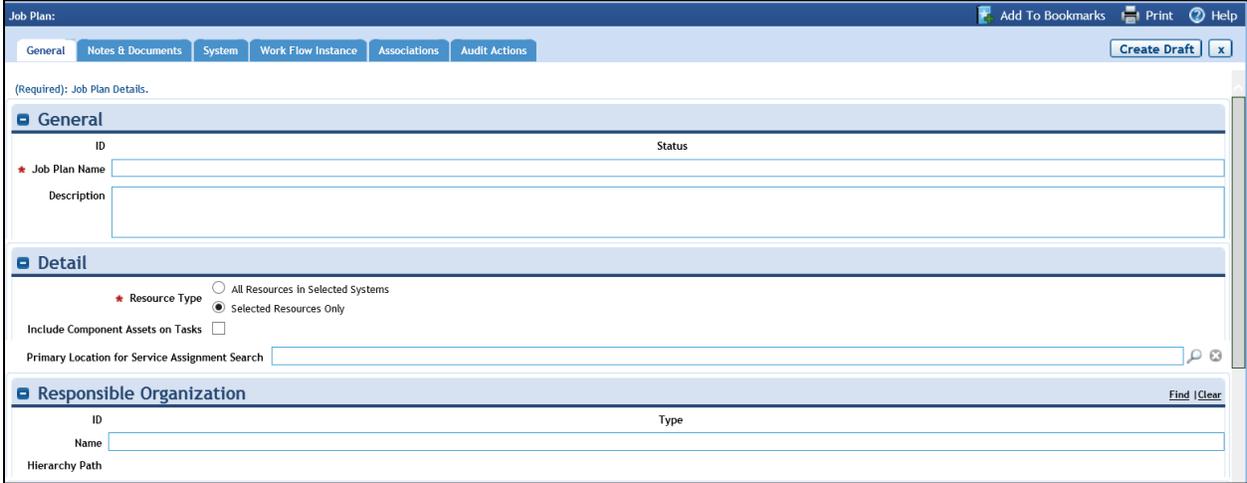
From the Maintenance portal, navigate to Preventative Maintenance and select Plan Work from the menu. Click the Add button on the job plan list to create a new job plan record. Clicking a job plan link in the list will open the existing job plan for review and/or modification.



General

On the General tab, enter the necessary information to define the job plan. Enter a Job Plan Name and Description. Select a Resource Type, either All Resources in Selected Systems or Selected Resources Only (default). Enter optional data into the remaining fields, including:

- Primary Location
- Responsible Organization
- Service Provider
- Include Component Assets



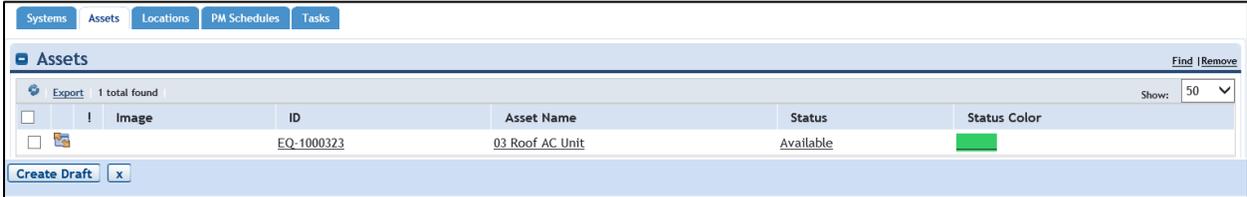
Systems

Selecting the All Resources in Selected Systems option will enable the Systems tab at the bottom of the General tab. Users can use the Find action to assign one or more building systems to the job plan. Adding systems to the plan will automatically populate the Assets and Locations with the records associated with the selected systems.



Assets

The Assets tab is used to assign one or more asset records to the job plan. The list of available assets is dependent on the equipment records that have already been defined.



Locations

The Locations tab is used to assign one or more location records to the job plan.

When data entry is complete, save and close the job plan to save the record with a status of Draft.

Generate Schedule-Based Preventative Maintenance Work Task

Preventative maintenance (PM) work can be generated based on a defined recurrence schedule. Once the planned work is generated and activated, the work can be managed using the standard work management processes.

The process starts with locating and opening an existing job plan record in the Maintenance > Preventative Maintenance portal. Once the record is open, the PM Schedules tab at the bottom of the job plan form allows users to create and review PM schedules. Clicking the Add action will open a new window for the PM Schedule form.

The screenshot displays the 'PM Schedule' form with the following sections and fields:

- General Tab:**
 - Fields: ID, Name, Description, Status.
- Detail Tab:**
 - Request Class: [Lookup Icon]
 - Service Plan: [Dropdown]
 - PM Type: Schedule-Based
 - Frequency: [Dropdown]
 - Buttons: Create Recurring Pattern
- Service Level Defaults:**
 - Respond Within: 0 [25]
 - Follow-Up Within: 0 [25]
 - Due Within Duration: 0 [25]
- Estimates:**
 - Use Procedures?:
 - Work Time: 0 [25]
 - Cost: 5.00
- Procedures Table:**

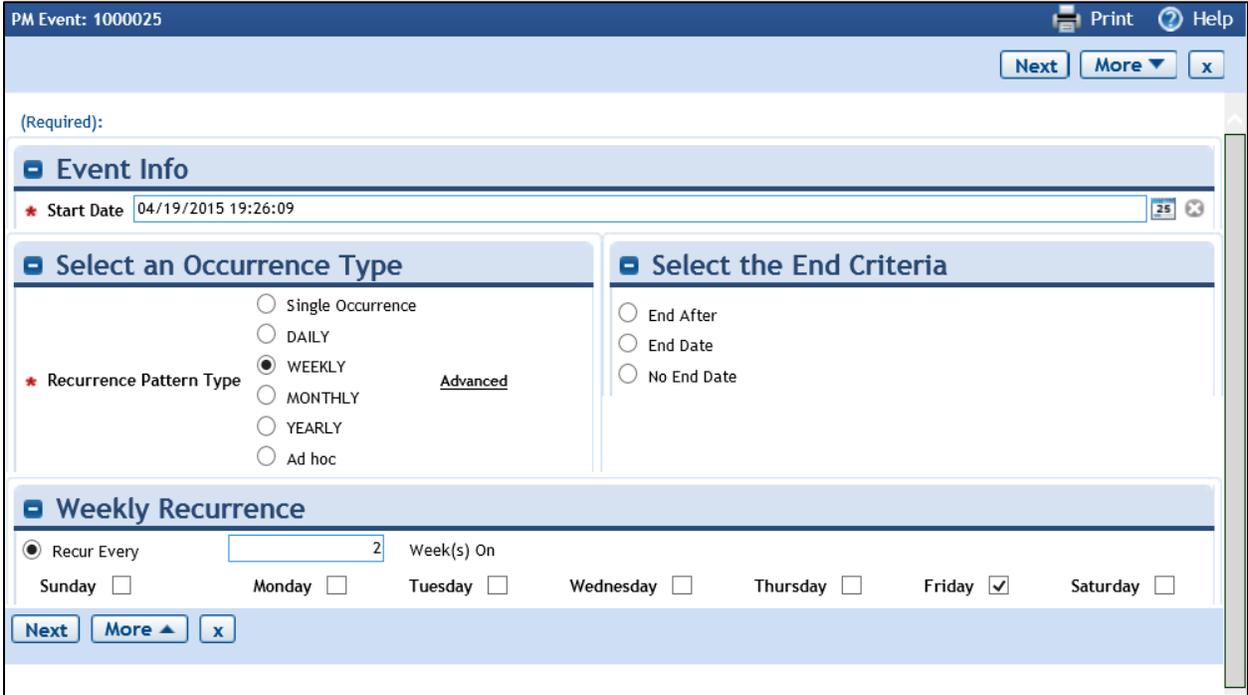
Plan Type	Name	Description	Is Environmental Procedure	Duration	Cost
No data to display					
				0	.00

General

On the General tab, enter a name and description for the schedule. Select a Request Classification from the list using the lookup icon. The PM Type should be set to Schedule-Based. Optional information on the General tab includes the Service Level Defaults and Estimates for time and cost.

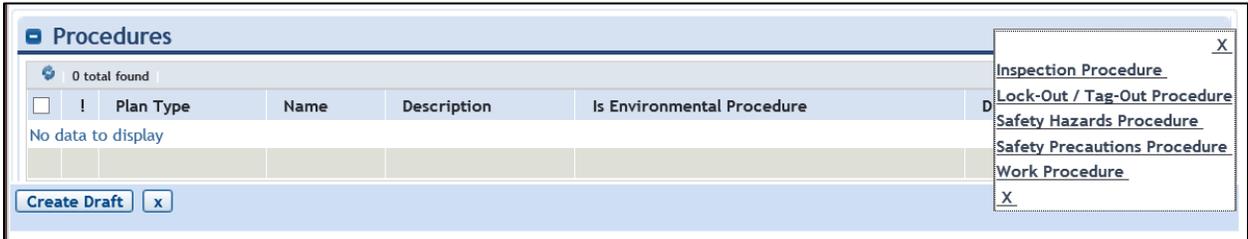
Recurrence

Users can create a recurrence pattern using the Create Recurring Pattern action. Options include, single occurrence, daily, weekly, monthly, and yearly. For example, a recurrence pattern could be set to bi-weekly on Fridays by selecting weekly and recur every 2 weeks on Friday.



Procedures

In the Procedures section, add procedures that detail the required steps for the technician to perform in order to complete the assigned schedule of work.



Activate

After a review of the data is complete, the preventative maintenance job plan is activated and the schedule creates with a status of Planned.

Generate PM Work Task

TRIRIGA will automatically generate PM work based on the schedule. Planned work tasks are automatically moved to an Active status on the planned start date of the task.

Activate PM Work Task

Selecting a work task with a status of Planned and clicking the Generate Work action will update the task status to Active.

ACTIVITY 1.6

Create Preventative Maintenance Work Tasks

Scenario

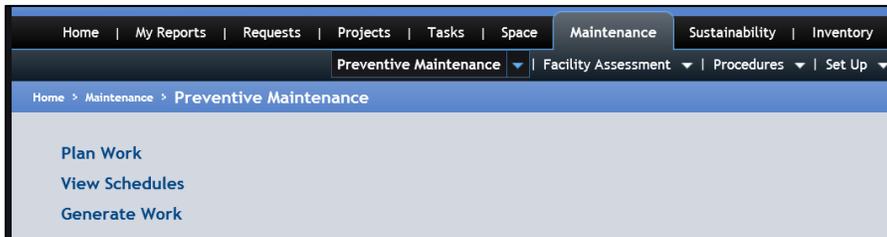
You want to set up a job plan to automatically schedule work tasks for preventative maintenance. You will use the Maintenance portal to create the job plan and add preventative maintenance.

Setup

- ✓ User is logged in to the TRIRIGA Home Page.

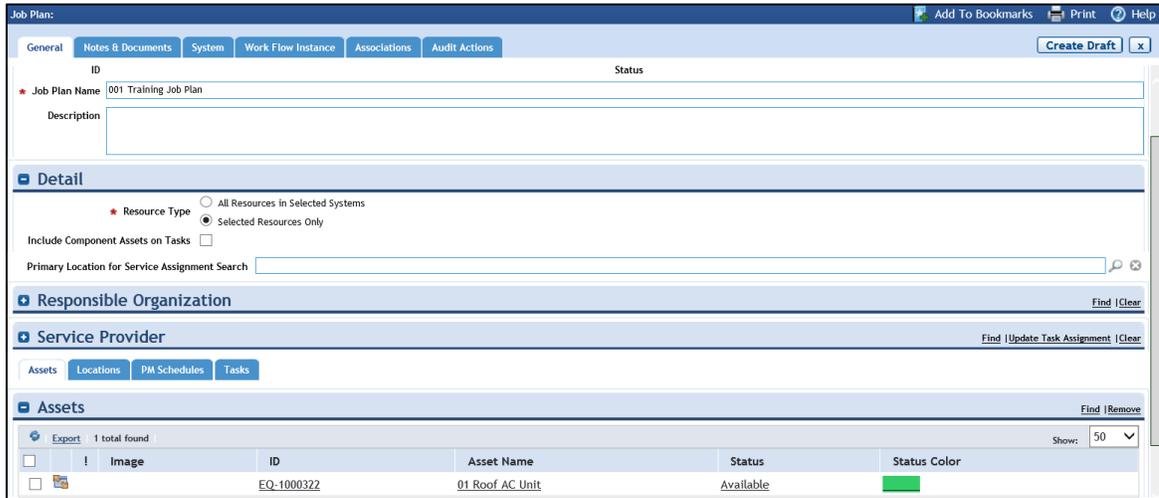
Steps

- A. Navigate to the Maintenance > Preventative Maintenance portal landing page.
 1. Click the **Maintenance** tab.
 2. Click the **Preventative Maintenance** option in the sub header.
 3. Click **Plan Work**.



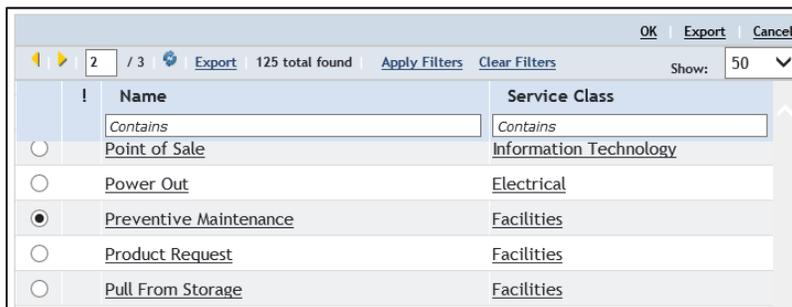
- B. Create a PM job plan.
 1. Click the **Add** action.
 2. In the **Job Plan Name** field, enter **## Training Job Plan**, where **##** is your student number.
 3. In the **Service Provider** section, click the **Find** action.
 4. Filter the results by **Type: Work Group** and select the radio button next to your student number work group.
 5. Click the **OK** action.
 6. In the **Assets** section, select the **Assets** tab, click the **Find** action.
 7. Click the **checkbox** for the Air Conditioner created in a previous activity.
 8. Click the **OK** action.

9. Click the **Create Draft** Action.



C. Create a PM schedule to generate the task.

1. Click the **PM Schedules** tab.
2. Click the **Add** action.
3. In the **Name** field, enter **## Training PM Schedule**, where **##** is your student number.
4. In the **Detail** section, for the **Request Class** field, click the **magnifying glass** lookup icon.
5. Select the **radio button** for **Preventative Maintenance**.
6. Click the **OK** action.



7. Click the link for **Create Recurring Pattern**.
8. Select the radio button for **Monthly**.
9. Select the radio button for **End After** and enter **2** in the box for **Occurrences**.
10. In the **Monthly Recurrence** section, select the radio button for **Day [x] of every [x] month**

11. Enter **1** in both boxes that appear

12. Click **Next**

13. Click **Complete**

14. Click the **Create Draft** action.

15. Click the **Activate** action.

D. Activate the job plan and review the tasks.

1. In the **Job Plan** form, click the **Activate** action.

Generate Meter-Based Preventative Maintenance Work Task

Preventative maintenance (PM) work can be generated based on a meter reading log entries. Once the monitored meter reading log exceeds a defined threshold, work is generated and activated. The work created by a PM job plan can be managed using the standard work management processes.

The steps involved in generating a meter-based, preventative maintenance work task are very similar to the process of generating schedule-based work tasks. The only difference is that the job plan PM schedule uses a PM Type of Reading-Based. This changes the form and displays sections for Reading Action Rules and Reading Occurrence Details.

The Reading-Based options include:

- Reading Classification
- Reading (Units)
- Action Based On
- Action Occurrence

The action can be based on a value, variance, cumulative total, or reset total. The Action Occurrence can be set based on when a reading occurs. All other options are the same as creating a schedule-based PM schedule.

2.7. Perform Work Task

TRIRIGA allows users to create, track, and manage work tasks utilizing a variety of tools and resources. Much of the work that is done in the system to manage tasks requires that some setup and configuration be completed first. After work is performed there are several follow-up steps that can be performed prior to closing out a work task and reporting on work performed. This topic will identify the processes involved in the completion of work tasks. The steps outlined in this section include the following:

- Performing Maintenance Setup
- Setup of Service Level Agreements
- Setup of Maintenance Teams
- Assigning Resources to a Task
- Performing a Work Task
- Assigning Equipment to a Task
- Procurement of Goods and/or Services for a Work Task
- Performing a Work Survey
- Tracking Accidents
- Closing Work Tasks
- Performing Work Reporting

Perform Maintenance Setup

Maintenance setup involves the creation of a maintenance service plan. Service plans are associated with a request class that determines the business rules that are to be applied by the service management process. Service plans are used to centralize the rules used to manage service requests and work tasks. A request class cannot be associated with more than one service plan. However, it is common for a generic service plan to be associated with more than one request class record. Only authorized users have the ability to create service plans.

Setup Service Level Agreements

When more than one group provides the same service, the service assignment matrix records are used to evaluate and assign the work to the appropriate service provider. Service assignment matrix records allow administrators to define Service Level Agreements (SLAs) with external or internal maintenance organizations. SLAs include a start date and an end date for the effective period of the agreement. SLAs are used to define the contractual terms and conditions for maintenance service agreements. Only authorized users have the ability to create Service Level Agreements.

Setup Maintenance Teams

Maintenance teams are used as resources for both internally and externally assigned work tasks. The workgroup supervisor is responsible for assigning specific workgroup team members to individual work assignments. Labor Class records can be managed in the Portfolio > People portal. Workgroups are managed in the Portfolio > Organizations portal. In TRIRIGA, every resource (person, location, or asset) can be assigned an availability calendar that shows working days/hours that the resource is generally available to be scheduled and non-working event days (holidays). Only authorized users have the ability to create and manage workgroups in the Organization hierarchy.

Assign Resources to a Task

Task assignment can occur in a number of ways, including automatic assignment to a responsible organization based on service plan settings and manual assignment via the dispatch manager. The goal should always be to do smaller cost (in money, time, and resources) maintenance in an effort to avoid larger, more costly repairs over the long term. The Work Plan allows maintenance managers to allocate resources to tasks efficiently by assigning service technicians based on the desired schedule.

The maintenance supervisor is responsible for managing work plans and teams of resources. A work plan is created by navigating to the Tasks > Assign Tasks portal, clicking Manage My Work Plans, and clicking the Add action.

The screenshot displays the 'Manage My Work Plans' interface. At the top, there is a navigation bar with options like Home, My Reports, Requests, Projects, Tasks, Space, Maintenance, Sustainability, Inventory, Contracts, Procurement, Portfolio, and Tools. Below this is a sub-navigation bar with Manage Resources, Assign Tasks, Manage Tasks, My Tasks, My Qualifications, Time Sheets, Procedures, Set Up, and Accident Report. The main content area shows a table with 0 total found items. Below the table is the 'Work Plan' form, which is currently in the 'General' tab. The form includes fields for Plan Name (Student 4), Contact (Student 4), # of Weeks (1), Start Date (04/19/2015), End Date (04/25/2015), and Scheduled Rebuild (04/20/2015 00:01:00). There are also checkboxes for 'Include Weekend Days?' and 'Include Overdue Tasks?'. A 'Workgroups' section on the right shows 0 total found items. The interface includes various utility buttons like 'Open In New Window', 'Add to Bookmarks', 'My Bookmarks', 'Add', 'Delete', 'Form', 'Bottom View', 'Print', and 'Help'.

Work Plan – General

In the General section, enter a Plan Name and a Contact.

Work Plan – Parameters

In the Parameters section, set the basic work plan timeframe which includes the number of weeks and whether to include weekend days or overdue tasks.

Work Plan – Workgroups

The Workgroups section is used to define the organizations that are included in the work plan.

Work Plan – Scheduled Rebuild

The Scheduled Rebuild section is used to define how often the system will regenerate the work plan data. By default, rebuilds happen daily and can be scheduled for non-working hours.

Work Plan – Contacts

In the Contacts section, managers can associate additional contacts with the work plan.

When data entry is complete, click the Create action to generate the record and start the build process. The plan build can take several minutes to process and the user will be notified when the plan is ready for use.

From the work plan, select the desired task. Right click on the desired resource and select the Place action. Click OK then click the Assign action to commit the change. Continue assigning or moving work until all warnings have been cleared. Warnings indicate work that is unassigned or resources that are over allocated.

Perform Work Task

Once a task is dispatched to the appropriate resource, some modifications to the work task can be made, including assignment of failure codes or descriptions of the work performed to resolve the problem. While work is in progress, the task may be put on hold and resumed as necessary, for example if there are missing parts, or by request of the person who initiated the request.

Once work is performed, the work task can be marked as Complete and details of the work performed, such as labor, hours, costs, and actual completion date/time entered.

Tasks assigned to a technician are displayed in the My Active Tasks portal section. Clicking a work task will open the task and allow the user to view the details including resources related to the task, task location, task description, and task planning dates. The technician can place the task on hold for parts or for requestor reasons and reactivate the task when necessary.

On the Work/PO Details tab, the technician can verify any procurement information that may be related to the task.

On the Resources tab, the technician enters any materials or equipment used to complete the task.

On the Work Task Info tab, the technician enters their own time, including the following information:

- Time Entry Date

- Time Category
- Hours
- Comment

The technician can then save the changes using the Save or Save and Close action. If the task has been completed, the technician can update the work task status to Complete using the Complete action.

When a work task is marked as complete, related requests are automatically changed to Complete, the requestor is notified of the change to the request status, and the survey process is initiated if a survey template is attached to the request classification of the completed request record.

Perform Work Survey

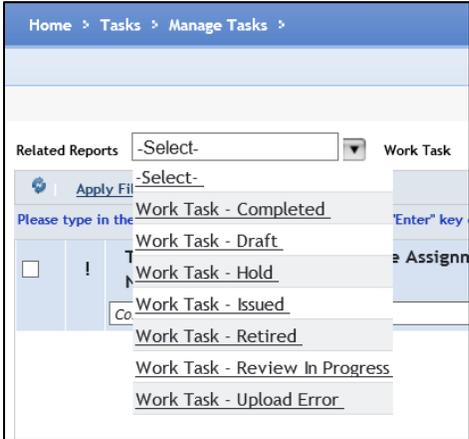
If a survey template is assigned for the type of work that is requested, then a survey request will automatically be sent to the requestor after the service technician completes the work task associated with the request.

A survey request can also be manually created in the Requests > Surveys portal using the New Survey Request link.

When a survey is sent to a requestor, the requestor will receive an e-mail notification about the survey request. Pending surveys are listed in the My Pending Surveys list accessed via the Request portal in the Reminders section. The user completes the survey questions and submits the record with the survey responses which are used to provide feedback to the service management team.

Close Work Task

Work tasks that have been marked as complete are considered ready for review and closeout. The closeout of a work task indicates that the work performed was accepted. Closed tasks can no longer be modified. Survey results or other information about the quality and completeness of the work performed should be reviewed prior to closing out the task. All task revisions should be completed prior to moving the work task from Completed to Closed.



If a completed work task is considered acceptable, the service manager can close the task from the work task record. From the work task form, clicking the Close action will change the task status to Closed. The Work Task – Completed query can be used to close multiple work tasks simultaneously using the checkboxes next to each record.

The screenshot shows a table of work tasks. The table has columns for Task Name, Task ID, Service Assignment Class, Work Location, Status, and Actual Start. There are 4 records, all with a status of 'Completed'. The table also includes an 'Export' button and a 'Show: 50' dropdown.

Task Name	Task ID	Service Assignment Class	Work Location	Status	Actual Start
DEFAULT - Work Task Template - Corrective Maintenance-Elevator	1027401	Facilities	\Locations\999-Training Facility\999 Training Building	Completed	12/11/2014 13:56:30
DEFAULT - Work Task Template - Corrective Maintenance-Elevator	1027415	Facilities	\Locations\999-Training Facility\10 Training Building	Completed	12/15/2014 10:26:09
DEFAULT - Work Task Template - Corrective Maintenance-Elevator	1027417	Facilities	\Locations\999-Training Facility\08Training Building	Completed	12/15/2014 10:34:57
DEFAULT - Work Task Template - Corrective Maintenance-Elevator	1027421	Facilities	\Locations\999-Training Facility\02 Training Building	Completed	12/15/2014 10:37:30

If a completed work task is considered not acceptable, the service manager can re-open the task from the work task record. From the work task form, clicking the Re-Open action will change the status to Active.

ACTIVITY 1.7

Create Work Plan

Scenario

Using the work tasks that you previously created, you are the Service Manager responsible for managing schedules and assigning work to your team. You will need to set up your work group and set up a work plan for your team.

Setup

- ✓ User is logged in to the TRIRIGA Home Page.

Steps

A. Update Work Task with Work Group.

1. Navigate to the Tasks > Manage Tasks > Work Task
2. Filter on **Work Location** field, locate and click on the corrective maintenance task containing **General ## Training Building** as the work location, *where ## is your student number*.

	Task Name	Task ID	Service Assignment Class	Work Location	Status	Actual Start	Planned Start (Respond Date)	Planned End (Due Date)	Actual End	Actual Percent Complete
<input type="checkbox"/>	Contains	Contains	Contains	01 Training Building	Contains	Equals	Equals	Equals	Equals	Contains
<input type="checkbox"/>	DEFAULT - Work Task Template - Corrective Maintenance-Elevator	1027467	Facilities	Locations\999-Training Facility\001 Training Building	Active		04/19/2015 19:08:30	04/19/2015 23:08:30		0 percent

3. In the **Responsible Organization** section, select find to open a list of available workgroups.
4. Select the radio button for **## Work Group**, *where ## is your student number*.
5. Click **OK**.

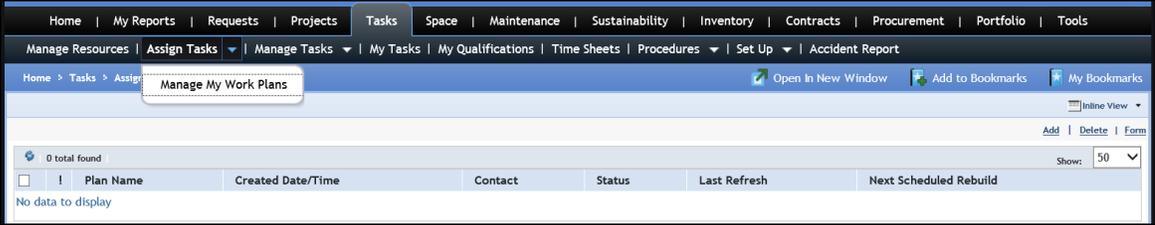
Responsible Organization		Unassign Find Clear
Name	01 Work Crew	Organization Type Workgroup
Hierarchy Path	\Organizations\01 Work Crew	

6. Click the **Save** action and wait for the record to update.
7. Click the **Save & Close** action.

B. Create Work Plan

1. Navigate to the Tasks>Assign Tasks

2. Click on **Manage My Work Plans**.



- 3. Click **Add** to create a new Work Plan
- 4. In the **General** section, enter **## Work Plan**, where **##** is your student number.
- 5. In the **Workgroups** section, click the **check box** for **## Workgroup**, where **##** is your student number, click **OK**.
- 6. Click the **Create** action.



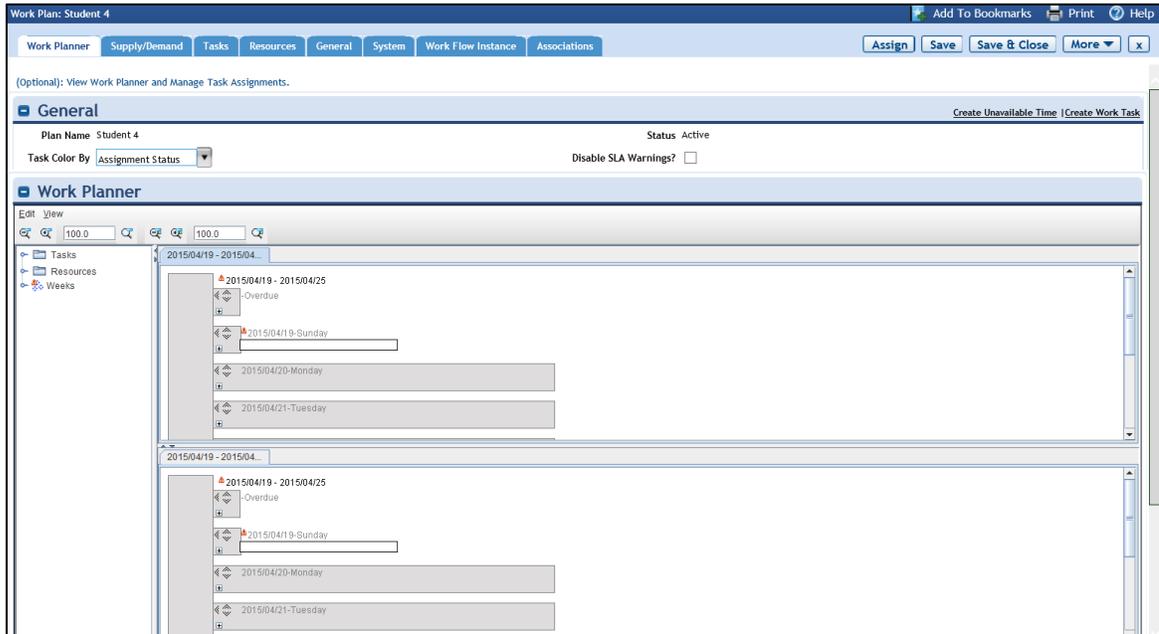
- 7. Close the **Work Plan** window. It will take the system a few minutes to generate the Work Plan, the **Status** of the Work Plan will display as '**Processing**'. Click on the **Refresh** icon until the **Status** of the Work Plan displays as '**Active**'.

Attention!

Please Wait. The Work Plan is gathering the necessary data for Planning. You will receive a Notification once the process has finished.

Plan Name	Created Date/Time	Contact	Status	Last Refresh	Next Scheduled Rebuild
Student 4	04/19/2015 20:09:35	Student 4	Active	04/19/2015 20:11:08	04/20/2015 00:01:00

8. Select the **Work Plan** record to open the **Work Planner**.



C. Assign Work

1. In the Work Planner, expand the schedule for today's date by clicking on the + icon..
2. Click on the **unassigned task** to select.
3. Expand the first day in the center box to reveal the **resources** assigned to this **Work Plan**.
4. Right click on **##Student** and select **Place**.
5. Click the **Assign** action.
6. Click the **Save and Close** action.

ACTIVITY 1.8

Perform Work Task

Scenario

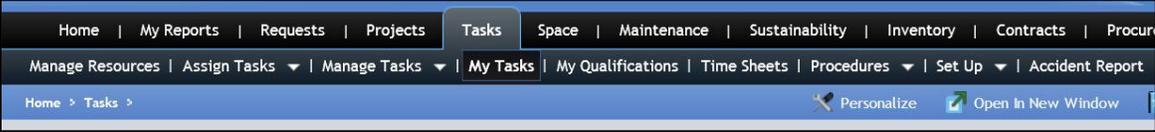
Using the work tasks that you previously created, you are the technician responsible for completing the work task and entering in the task completion information into TRIRIGA.

Setup

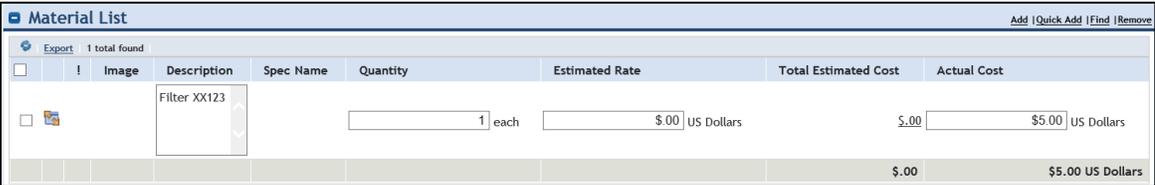
- ✓ User is logged in to the TRIRIGA Home Page.

Steps

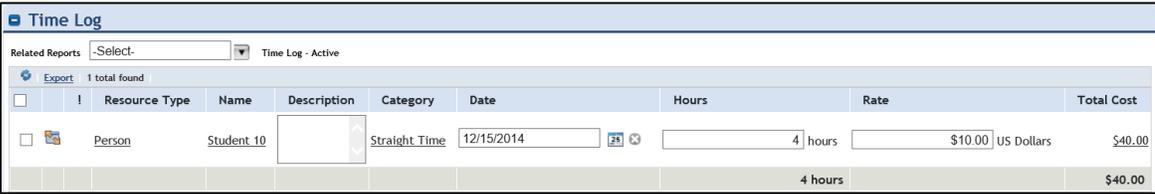
- A. Navigate to the My Active Tasks portal.
 - 1. Click the **Tasks** tab.
 - 2. Click the **My Tasks** option in the sub header.



- B. Complete the Work Task Info tab.
 - 1. Click on the task and navigate to the **Resources** tab.
 - 2. Verify that task is assigned to **Student##**.
 - 3. In the **Material List** section, click **Quick Add**.
 - 4. In the **Description** field, enter **Filter XX123**.
 - 5. In the **Quantity** field, enter **1**.
 - 6. In the **Actual Cost** field, enter **5.00**.



- 7. In the **Resources** section, click the **checkbox** next to **## Student** and then click **Quick Add Time Entry**.
- 8. In the **Time Log** section enter **4** in Hours and **10** in Rate.



- 9. Navigate to the **Work Task Info** tab.
- 10. In the **Resolution Comment** section, enter **## task complete**, where **##** is your student number.
- 11. Click **Save**.

2.8. Assigning Equipment

Each equipment or vehicle record managed in TRIRIGA can be assigned to locations and people.

When assigning equipment, the user will only be presented with items currently available. Once assigned to a user the selected equipment or vehicle record becomes unavailable in the list.

Manage Equipment Assignment

TRIRIGA can be used to manage the assignment of shared equipment.

A service technician updates the work tasks using the My Active Tasks portal section. The portal displays work tasks directly assigned to the technician. Work Tasks are opened by clicking on the task in the list. The technician can view the details of the assigned task, including any resources related to the task, the task location, task description, task planning dates, etc. The technician is allowed to modify some of the values on the work task directly.

Resources Tab

On the Resources tab, the technician creates a resource entry for all parts and equipment used during the performance of the assigned work.

The screenshot displays the 'Resources' tab in the TRIRIGA system. It contains several sections:

- Resources:** A table with columns: ID, Name, Resource Type, Resource Requirement, and Percent Allocated. It shows '0 total found' and 'No data to display'.
- Work Time:** A form with fields for Work Start (04/19/2015 19:08:30), Work End (04/19/2015 23:08:30), Work Hours (input field with '4'), (Assigned) (0), and (Unassigned) (4).
- Resource Allocations:** A table with columns: Resource, Date, Hours, Planned Start, Planned End, Planned Duration, and Status. It shows '0 total found' and 'No data to display'.
- Material List:** A table with columns: Image, Description, Spec Name, Quantity, Estimated Rate, Total Estimated Cost, and Actual Cost. It shows '0 total found' and a row with Total Estimated Cost of .00 and Actual Cost of .00.
- Equipment:** A table with columns: Name, Spec Class, Usage Cost, Usage Unit, and Asset Status. It shows '0 total found' and 'No data to display'.

Equipment

On the Resources tab, Equipment section, the user can click the Find action to display a list of available equipment. From the list, the user selects all of the equipment items that were used to perform the work. When finished, click the OK action to save the equipment items to the work task.

Equipment Find Remove					
Export 1 total found					Show: 10 ▾
<input type="checkbox"/>	Name	Spec Class	Usage Cost	Usage Unit	Asset Status
<input type="checkbox"/>	02 Roof A/C Unit	Air Conditioners		\$0 Day	Available

Asset Status

After adding equipment to the work task, it will need to be assigned. Clicking on the equipment item in the Equipment section will display the Equipment form.

Asset Assign: Print Help

General System Work Flow Instance Associations Continue x

(Required): Enter the dates and assignee for this Asset.

General

ID Status

Details

* Assign Date 04/20/2015 00:44:01 25 x Return Date 25 x

Comments

Assigned To Find Clear

Name
eMail
Work Phone

Continue x

On the form, in the Asset Status section, click the Assign action and complete the following fields:

- Assign Date (Required)
- Return Date
- Comments
- Assigned To

When the necessary information has been entered, click the Continue button to assign the asset. The Asset Status will change to Assigned.

Asset Status Unassign Lost

In Service Date 25 x Asset Status Assigned

Assign Date 04/20/2015 00:44:01 Return Due Date 25 x Assigned To 25 x

Ownership Status

Warranty Status

Details

After equipment is assigned, the location of the equipment may need to be changed. In the Details section, click the lookup icon for Primary Location. It may be necessary to clear the existing location by clicking the Clear Primary Location action. On the location lookup screen, select a location and click the OK action. The Primary Location of the equipment item will be updated. Click the Save & Close button to save any changes made to the equipment item.

Appendix A

TERMINOLOGY

The terms listed below are used throughout this training guide.

Table 1: Terminology

Term	Description
Acquisition	Defines the real estate details of a property being purchased from another party.
Approvals	Ensure that created and modified records meet the defined business requirements.
Assets	Owned or leased items, such as buildings, equipment or vehicles that are tracked in the TRIRIGA system.
Capital projects	Large-scale goals, such as the construction of a building project that typically requires significant funding to complete.
Condition Assessment Plan	A plan for ensuring that critical building systems are regularly inspected and the current condition of systems is recorded.
Current Terms	Defines the current terms and conditions of a lease agreement with another party.
Dashboard	Default page for each security group or user role that provides a snapshot of current activity.
Disposition	Defines the real estate details of a property that is being sold to another party.
Evaluation surveys	Used to follow up requests, maintenance, sustainability measurements, and space reservations with a questionnaire that provides feedback to the service provider on the quality of work performed.
Expiration	Defines the real estate details of a lease whose duration is elapsed.
Facilities projects	Smaller-scale goals, such as painting an office, moving cubicles, and handling plumbing or electrical repairs.
Funding Request	Used to request the necessary funds to pay for assessed opportunities.
Funding Sources	Budgetary resources for programs and projects.
Home Page	Returns the user to the default Dashboard page and includes the available portals for that user based on assigned security.
Job Plan	The primary record in the preventative maintenance process that defines who is responsible for the work to be performed and identifies the building systems, assets, and locations that will be serviced, also referred to as the scope.
Landing Pages	Contain actions organized into menus and sections of relevant information.
Lease	Defines the real estate details of a lease agreement with another party.
Leases Portal	Used to view real estate contracts and asset leases.
Manage Moves Project	Management of moves includes managing move service requests, planning scheduled moves, and planning strategic moves.
Notifications tab	A tab in each record that defines users who are notified of any changes or approval requirements.
Portals	The main application sections within TRIRIGA.
Portfolio portal	Central store of Locations, Organizations, People, Specifications, and Assets.
Preventative Maintenance	Work performed on a defined schedule.

Term	Description
Program record	Provides details about the higher-level business vision, business goals, or business objectives that govern and align the objectives across multiple inter-related projects.
Project	Defined by its general information, the team members, the scope, a schedule, and a budget.
Project Record	Used to manage all activity related to the completion of work for a specific project, including the tracking of costs, tasks, milestones, and resources.
Requests portal	Used to issue, manage, and track various requests.
Service Level Agreements (SLAs)	Used to define the contractual terms and conditions for maintenance service agreements.
Service Plans	Used to centralize the rules used to manage service requests and work tasks.
Termination	Defines the real estate details of a lease that is closing before its original end date.
Utility meters	Used to track utility consumption data for locations.
Work Plan	Used to manage work groups and assign work through scheduling of resources.

Appendix B

LIST OF ACRONYMS

The table below lists the acronyms that are used in this training guide.

Table 2: Acronyms

Acronym	Definition
CAM	Common Area Maintenance
CTQ	Critical to Quality
OpEx	Operating Expense
PM	Preventative Maintenance