



# AFIS

ARIZONA FINANCIAL INFORMATION SYSTEM

## **Facilities Management:**

### **Space Management**

### **IBM TRIRIGA**

### Training Guide

Version 5.0

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# About This Training Guide

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## TRAINING GUIDE DESCRIPTION

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This training guide covers the use of IBM TRIRIGA, a web-based Facilities Management application that supports facility operations for occupancy and space management. Users will learn how to create and allocate spaces for the purpose of planning, and monitoring the use of space and facilitating the allocation of costs.

## TRAINING GUIDE OBJECTIVES

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In this training guide, you will:

- Create a floor and space record
- Create, track and manage a space reservation for the purpose of allocating costs

# 1. Operation Functions

## Learning Objectives

In this lesson, you will:

- Identify the process of creating Locations
- Perform the function of creating Floors
- Perform the function of creating Spaces

## Lesson Overview

This lesson examines the operational functions available in TRIRIGA for the creation of locations and spaces in a hierarchal system. The Portfolio is a central store of asset, location, and other records used throughout the system.

### 1.1. 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.

## State Process Overview

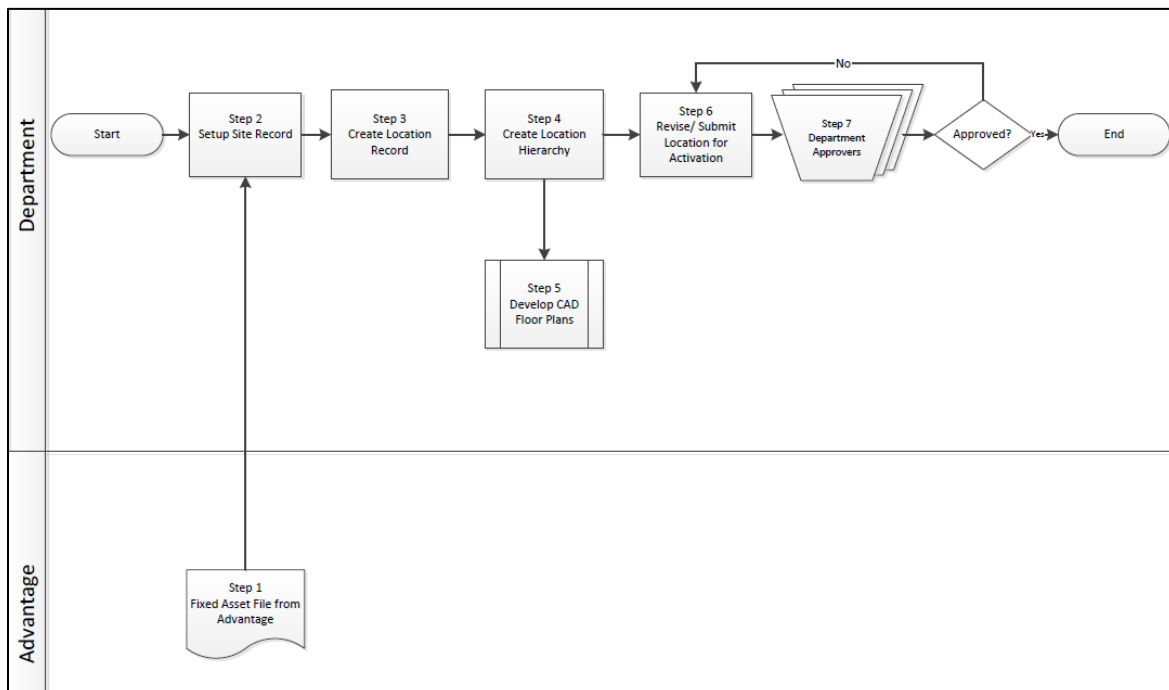
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The steps below describe the statewide process. Your agency may have additional requirements. This process is referenced in To Be ID FM-TB-001 (Manage Portfolio) and represented by Figure 1 below.

1. AFIS is the system of record for all Fixed Asset information. Fixed Asset information is sent from AFIS to TRIRIGA in order to establish location information in the TRIRIGA database. TRIRIGA users will then further define the location information.
2. A TRIRIGA user can create locations that define a group of related buildings, land areas, or other locations. A group of locations is referred to as a Property. Each Property record can be assigned to a Geography which links the Property to a region as defined with each organization. Basic information about the Property can be entered, including any attributes that are common or relevant to each of the location records associated with the Property.
3. A TRIRIGA user can define specific locations, including building or land records. Each location record can be assigned to the location hierarchy, including assignment to a parent Property record. Each location record in TRIRIGA is used as the data point in which all real estate and facility management activity is associated. Maintenance activity, project activity, lease administration, condition assessment, and space management are all activities that occur at specific locations. The history of this activity can be monitored using the location record. Each location can be assigned geo-code information to allow for spatial display and analysis of facility inventory, condition, and work order history information using GIS-enabled map functions.
4. Within each building location, a TRIRIGA user can define a hierarchy of space, including floors and spaces. By organizing the building record into separate floors, more precise definition of maintenance and project locations is possible. For example, a work task can describe the exact space of a reported problem to a technician, rather than simply a building number or description.
5. Once the location hierarchy is defined, CAD floor plans can be associated with each floor record in the database. CAD plans typically include a definition of the room/space boundaries (polylines). The integration of CAD data with floor plans allows for automatic calculation of floor and space areas, and the ability to graphically query the floor plan based on the data attributes of the spaces in the plan. Ongoing changes to the base CAD drawing will occur, and will require republishing. TRIRIGA exposes the user to CAD views of locations throughout the application. The user can interact with the drawing viewer using pan and zoom controls, measure functions, graphical reports, color-coding, and exporting.

6. Once the location record is fully defined, including the definition of key attributes (e.g. coordinate data for mapping) and floor plan data, then the location can be activated. Once a record is submitted for activation, an optional approval can be used to control which locations are available for reference to other activity in the system (e.g. projects, work orders, etc.). If the approval step is not used, the location record can be activated immediately. If the approval step is enabled, the assigned approver will be notified of an approval action. The location records will require the user to review and approve the location record prior to activation.
7. Record information and any attached documentation are reviewed and approved by the department. If the approver determines there are missing or incorrect data, then the record is rejected and returned for corrections in Step 6: Revise/Submit Location for Activation. If the approver determines the data is complete and acceptable, then the record is approved and the process ends.

**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.

| Open | New | Delete | Cut                      |
|------|-----|--------|--------------------------|
|      |     |        | <u>X</u>                 |
|      |     |        | Building                 |
|      |     |        | External Retail Location |
|      |     |        | Installation             |
|      |     |        | Land                     |
|      |     |        | Location Category        |
|      |     |        | Property                 |
|      |     |        | Proposed Retail Location |
|      |     |        | Proposed Site            |
|      |     |        | Retail Center            |
|      |     |        | Retail Location          |
|      |     |        | Structure                |

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.

Building: Print Help

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

(Summary): Review the Area Summary for the Building.

#### Building Area Measurements

|               |               |                          |               |                     |
|---------------|---------------|--------------------------|---------------|---------------------|
| Gross Area    | 0 square-feet | Gross Area (Imperial)    | 0 square-feet | Gross Area (Metr    |
| Rentable Area | 0 square-feet | Rentable Area (Imperial) | 0 square-feet | Rentable Area (Metr |
| Usable Area   | 0 square-feet | Usable Area (Imperial)   | 0 square-feet | Usable Area (Metr   |

\* Proration Rule: Balance To Measured

#### Floors

0 total found

| ID                 | Floor | Floor Class | Capacity | Headcount | Rentable Area | Usable Area | Vacant Space | Total Prorat |
|--------------------|-------|-------------|----------|-----------|---------------|-------------|--------------|--------------|
| No data to display |       |             |          |           |               |             |              |              |
|                    |       |             | 0        | 0         | 0             | 0           | 0            |              |

Building Area Measurement Details

Area Summary

### 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

Building: Print Help

General Contact Details Graphic Area Measurements Contracts Building Equipment Assessment Maintenance Reserve Move Space Management Create Draft X

(Optional): Assessment information for this building.

**Units**

Currency: US Dollars Area Units: square-foot

**Condition Details** Facility Assessment Analysis

|  |                                   |  |                 |
|--|-----------------------------------|--|-----------------|
| A. In Service Date                               | <input type="text" value="25"/>   | E. Gross Area                                      | 0 square-foot   |
| B. Life Expectancy (years)                       | 0 <input type="text" value="25"/> | F. Replacement Cost Per UOM                        | 5.00 US Dollars |
| C. Remaining Life                                | 100 percent                       | G. Overhead Factor                                 | 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                         | 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

Valuation: Print Help

General System Work Flow Instance Associations Create X

(Required): Valuation Details for the Location.

**General**

ID Status

Name

**Units**

Currency: US Dollars

**Details**

Valuation Type: Misc. Valuation Method: Not Applicable

Jurisdiction

Comments

Effective From  Effective To

Estimated Cost: 5.00 US Dollars Actual Cost: 5.00 US Dollars

Estimated Rate: 5.00 US Dollars Actual Rate: 5.00 US Dollars

Create X

### 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 Floor and Space Record

### Scenario

Your department has determined that it needs to track space within a building and a record must be created in TRIRIGA. You will use the Portfolio > Locations portal to create and update the record.

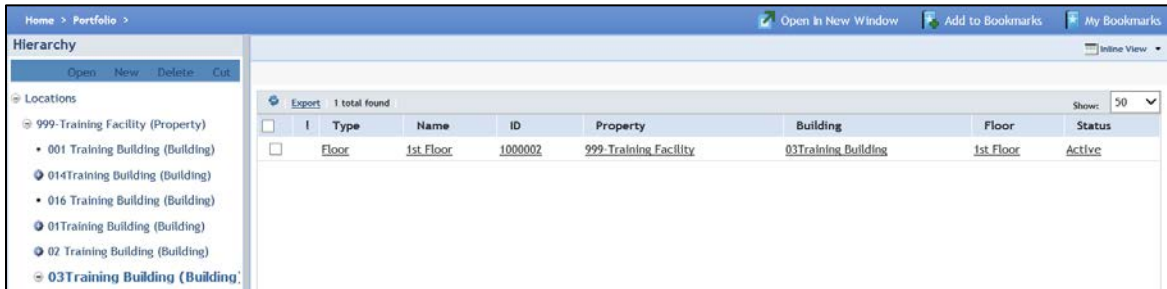
### Setup

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

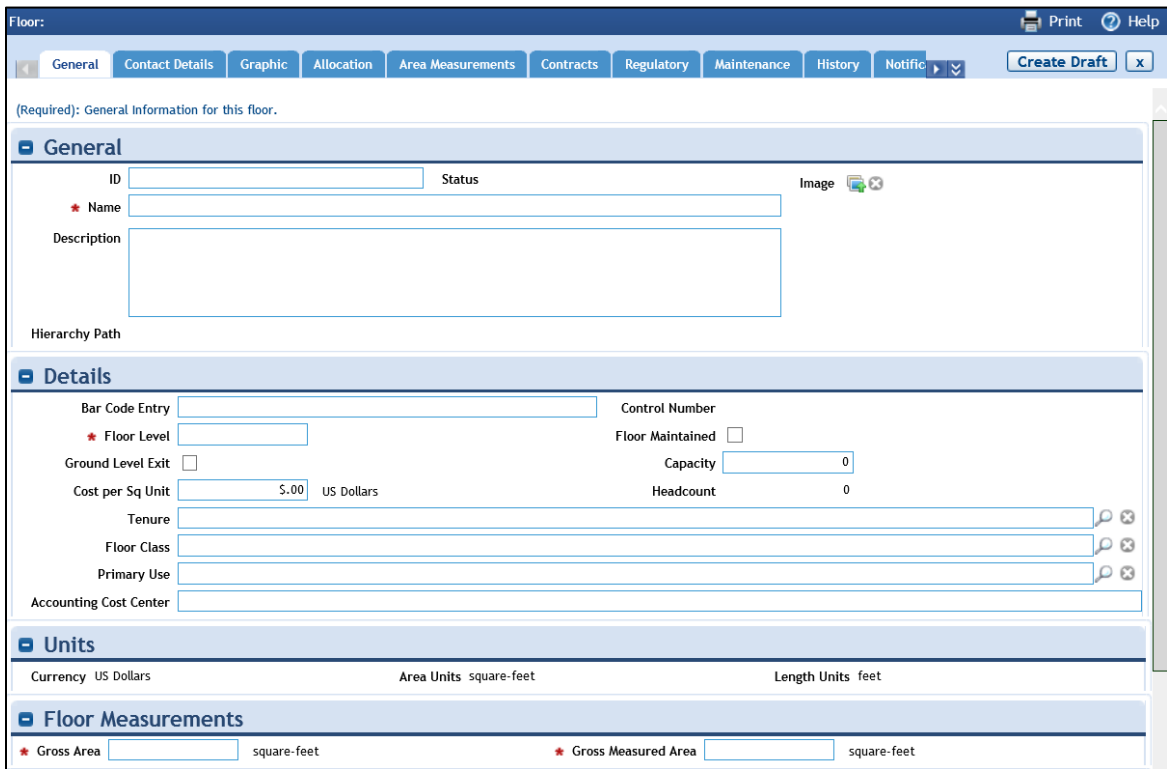
### Steps

- 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 expand **999 Training Facility (Property)**.

- Click on **## Training Building**, where **##** is your student number, from the list of buildings located at the property.



- Create a new Floor record.
  - In the **Hierarchy** section, click **New**.
  - In the list of location types, click **Floor**.



- Complete the General tab.
  - In the **General** section, in the **Name** field, enter **2<sup>nd</sup> Floor**.
  - In the **Description** field, enter **Temporary use for training**.
  - In the **Details** section, in the **Floor Level** field enter **2**.
  - In the **Floor Measurements** section, enter **1000** for both **Gross Area** and **Gross Measured Area**.



5. Click the **Create Draft** action.
  6. Click the **Activate** action.
- D. Return to the Locations Hierarchy page.
1. In the list of locations on the left, locate and expand **## Training Building**, where **##** is your student number.
  2. Click on **2<sup>nd</sup> Floor**.

| Type  | Name      | ID      | Property              | Building             | Floor     | Status |
|-------|-----------|---------|-----------------------|----------------------|-----------|--------|
| Floor | 1st Floor | 1000002 | 999-Training Facility | 03 Training Building | 1st Floor | Active |

- E. Create a new Space record.
1. In the **Hierarchy** section, click **New**.
  2. In the list of location types, click **Space**.
- F. Complete the **General** tab.
1. In the **General** section, in the **Name** field, enter **## Space**, where **##** is your student number.
  2. In the **Description** field, enter **Temporary use for training**.
  3. In the **Space Measurements** section in the **Area** field, enter **500**.
  4. In the **Current Use Space Classification** section, click **Find** in the top right corner of the section.
  5. Select the radio button for **\Classifications\Space Class Current\Alternative Workplace**.
  6. Click **Ok**.

Space: 03 Space Print Help

General Contact Details Graphic Details Allocation Finishes Regulatory Maintenance Activate Save Save & Close More X

(Required): General Information for this Space.

**General**

ID  Status Revision In Progress Image

\* Name

Description

Hierarchy Path \Locations\999-Training Facility\03Training Building\1st Floor\03 Space

**Details**

Bar Code Entry  Control Number

Primary Phone  Primary Fax

Primary Mail Stop

Hazardous Materials

Reservable  Emergency Exit Route

**Units**

Currency US Dollars Area Units square-feet Length Units feet

**Space Measurements**

|                 |  |                          |  |                       |
|-----------------|--|--------------------------|--|-----------------------|
| Area            | <input type="text" value="500"/> square-feet | Prorated Area            | <input type="text" value="500"/> square-feet | Gross Area            |
| Area (Metric)   | 46.45 square-meters                          | Prorated Area (Metric)   | 46.45 square-meters                          | Gross Area (Metric)   |
| Area (Imperial) | 500 square-feet                              | Prorated Area (Imperial) | 500 square-feet                              | Gross Area (Imperial) |

**Current Use Space Classification**

\* Used for Space Class Roll Up

\* Current Use Space Class

OSCRE Exterior Gross  Proration Type Not Applicable

7. Click the **Create Draft** action.
8. Click the **Activate** action.



## 2. Occupancy and Space Management

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### Learning Objectives

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In this lesson, you will:

- Review the process of Forecasting Occupancy
- Review Chart of Account set up for Program Codes
- Identify the process of creating a Room Utilization Program
- Create a Space Utilization record
- Review the reports available for viewing space utilization data
- Perform a space allocation
- Identify the concepts involved in move requests and move projects

### Lesson Overview

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Some of the functions performed in TRIRIGA revolve around the planning and allocation of space. This lesson focuses on the process of space utilization, allocation and planning.

### 2.1. Forecast Space Occupancy

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TRIRIGA provides a space management feature that can be used to maintain space plans and track space utilization data in buildings and structures. It is also possible to manage the people and assets that are in the space and coordinate property transactions in the system. Once spaces have been configured and classified, users can manage spaces through space associations, space audits, and space utilization.

### State Process Overview

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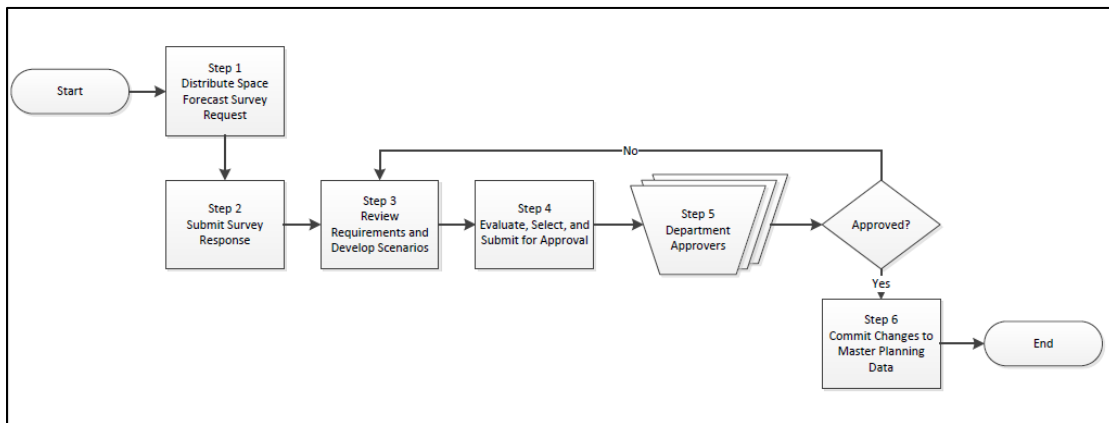
The steps below describe the statewide process. Your agency may have additional requirements. This process is referenced in To Be ID FM-TB-017 (Forecast Space Occupancy) and represented by Figure 2 below.

1. The forecasting process requires that the Space Planner gathers information from the business managers to determine the space requirements that meet the business needs and objectives. Space Forecast surveys are set up and generated in the Strategic Facilities Planning module. The surveys are tied to a Portfolio plan that defines specifics, such as; the forecast time span, fiscal time periods, contacts, planning objectives and scope. Surveys are generated for each organization and forwarded to the designated Business Managers for their input.
2. Surveys can be sent as either an online form that allows direct input of the information into the system, or as an offline form that is distributed as an Excel spreadsheet. Once the spreadsheet is

updated by the department business manager, the survey is sent back to the system where the forecast line items are updated. Survey request responses can be collected and monitored centrally to track which departments did not complete surveys.

3. The Space Planner reviews the long-term space usage forecast information from the surveys, along with the State and departmental goals and objectives to create alternative proposed solutions to the current Space Plan that satisfy the requirements.
4. The Space Planner reviews and evaluates the scenarios with the Scenario Evaluation and Comparison tool. Here the user can compare multiple scenarios side-by-side to review how each scenario performed against specific criteria. These comparison reports allow for better-informed decision making by management. The planner then identifies the recommended scenario plan and submits the recommended plan for review and approval.
5. The system allows the approvers to view all the scenarios in the side-by-side comparison and evaluation grid. If the plan requires further development or clarification, it is routed back to Space Planner for review. If approved, the process continues with Step 6.
6. Upon approval, the system changes the status of the recommended scenario to Approved, and it becomes read-only. All other scenarios are updated to a Retired status, which are also now read-only. The Space Planner applies the approved changes to the master plan. If the plan requires changes, the record can be revised, but may require re-approval.

**Figure 2: Forecast Space Occupancy (FM-TB-017)**



## Review Space Utilization Data

There are several Community Reports available in TRIRIGA designed to help users understand their current space utilization. These reports include the Area per Employee by Building report and the Floors report.

### *Area per Employee by Building*

Navigate to the My Reports portal and select the Community tab. In the Title filter field, enter Area per Employee and press Enter. The first report returned is the Area per Employee by Building report. This report illustrates the area per occupant of each building and the headcount total for each building.

### Floors

On the Community tab, in the Title filter field, enter Floors and press Enter. The first report returned is the Floors report. This report illustrates the space usage information, broken down by floor class, capacity, headcount, area usage (sq. ft.), vacant area (sq. ft.), for each floor record in the report. This report provides a clear picture of where space may be over-utilized or under-utilized.

All reports provide the user with an option to export the report data to Excel using the Export action on the report window.

## 2.2. Allocate Space and Track Occupancy

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TRIRIGA provides the ability to manage many aspects of space management including space allocations and occupancies.

### State Process Overview

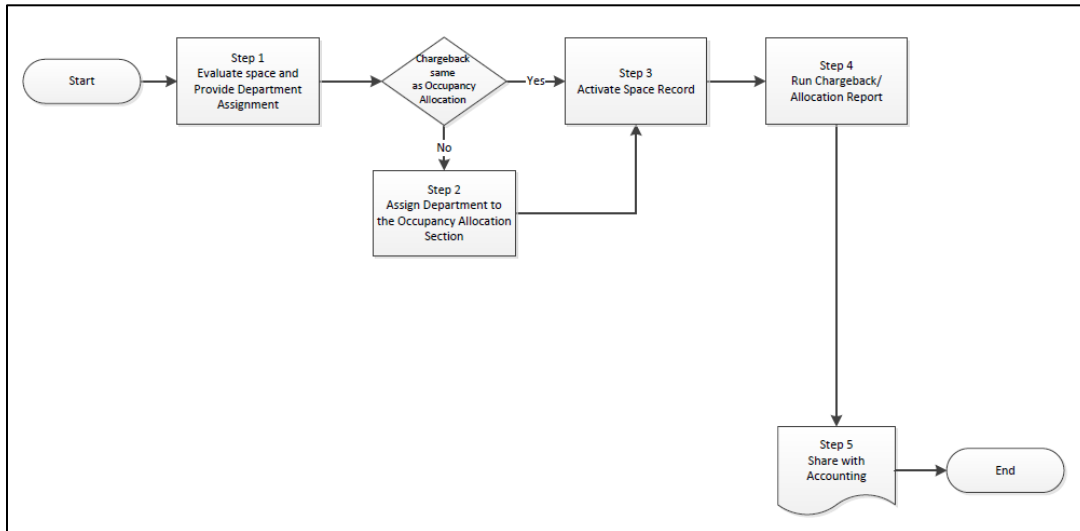
---

The steps below describe the statewide process. Your agency may have additional requirements. This process is referenced in To Be ID FM-TB-018 (Allocate Space and Track Occupancy) and represented by Figure 3 below.

1. The Space Planner evaluates the space for occupancy and chargeback assignments to departments. This activity is typically performed by doing a physical walkthrough of the facility to document who is occupying each space. Once move management processes are in place and enforced, space planners can rely on the system for tracking of what space each department is occupying, and physical walkthroughs can be performed less frequently. For each space, the assigned departmental allocation can be defined or revised using the Chargeback Allocations section on the Allocation tab of the space record. Area Allocated and Percent Allocated are auto-populated at 100%, but can be overwritten to reflect multiple department assignments.
2. In some cases, a space is assigned to one department for chargeback purposes, even when that organization does not occupy the space. If the assigned chargeback department is the same as the occupying department, the process can continue with Step 3: Activate Space Record. If the assigned chargeback department differs from occupying department the occupying department is assigned to the Occupancy Allocation section of the Allocation tab on the Space record. In addition, depending on State policy, departments may remain accountable for the chargeback of a space even after the space is left vacant.
3. Once the space is allocated to one or more departments, the space record is activated to update the department assignment and to trigger workflows that create the allocation records. The space record status is updated to Active.
4. Chargeback/allocation reports can be generated to display the amount of space and space costs allocated to each department, by site, by building, by floor, etc. The chargeback/allocation reports can be used for reviews with each department about their space usage.

5. Depending on State policies, the chargeback/allocation report may be used to apply proportional chargeback of other costs (e.g. utilities) based on the share of the total building space of each department. If the State will use proportional departmental space usage to determine other internal cost distributions, then the chargeback/allocation report will be shared with AFIS for charging to other areas.
6. The State will use an interface with AFIS to create the Room Utilization Programs necessary for the chargeback of space allocation for departments participating in cost allocation.

**Figure 3: Allocate Space and Track Occupancy (FM-TB-018)**



## Space Level Allocations

The Portfolio portal is used to locate records in the Location hierarchy. Navigate to the Portfolio > Locations portal and locate the Building > Floor > Space record for which allocations will be defined.

| Occupancy Allocations  |   |                   |                   | Chargeback Allocations   |   |                   |                   |
|--|---|-------------------|-------------------|--|---|-------------------|-------------------|
| Related Reports: <input type="text" value="-Select-"/> Space Level Occupancy |   |                   |                   | Related Reports: <input type="text" value="-Select-"/> Space Level Allocations |   |                   |                   |
| 0 total found  |   |                   |                   | 0 total found  |   |                   |                   |
| <input type="checkbox"/>   | ! | Organization Name | Area Allocated    | <input type="checkbox"/>   | ! | Organization Name | Area Allocated    |
|  |   |                   | Percent Allocated |  |   |                   | Percent Allocated |
| No data to display   |   |                   |                   | No data to display   |   |                   |                   |
|  |   |                   | 0                 |  |   |                   | 0                 |

Within the Space record, select the Allocation tab and then the Revise action. Chargeback allocations can be added and removed in the Chargeback Allocations section. Occupancy allocations can be added or removed in the Occupancy Allocations section. Select Save and Close when finished.

## Floor Level Allocations

Allocations can also be defined at the Floor level in the Location hierarchy. Navigate to the Portfolio > Locations portal and locate the Building > Floor record for which allocations will be defined.

Within the Floor record, select the Allocation tab and then the Revise action. To add new Floor-level allocations, in the Area Overlay section, select the Add action. A new Area Overlay Allocation window opens. In the Organizations Charged section, select the Organization and enter a name for the allocation. Complete the Overlay record by entering the amount of the area to be allocated in the Details section, click Create.

The screenshot shows the 'Area Overlay' form with the following sections:

- General:** ID, Status, Image, Name (required).
- Details:** Area (0 square-feet).
- Organization Charged:** Search results table with 0 total found. Columns: Name, ID, Type.
- Allocations:** Search results table with 0 total found. Columns: Allocation Id, Space, Organization Name, Space Class, Area Allocated, Percent Allocated, Status.

Within the Floor record, select the Activate action to route the record for approval. Once approved, the status will change to Active.

## Space Allocation and Chargeback Reports

There are several Community Reports available in TRIRIGA designed to help users understand their current space allocation. These reports include the Space Allocations by Organization report and the Space Chargeback by Organization report.

Both of these reports can be found on the My Reports portal, Community tab. Enter Space in the Title filter field and press Enter to display the available reports.

These reports can be exported to Excel using the Export action.

## ACTIVITY 2.2 (INSTRUCTOR DEMO)

### Create a Room Utilization Program (*manual process*)

#### Scenario

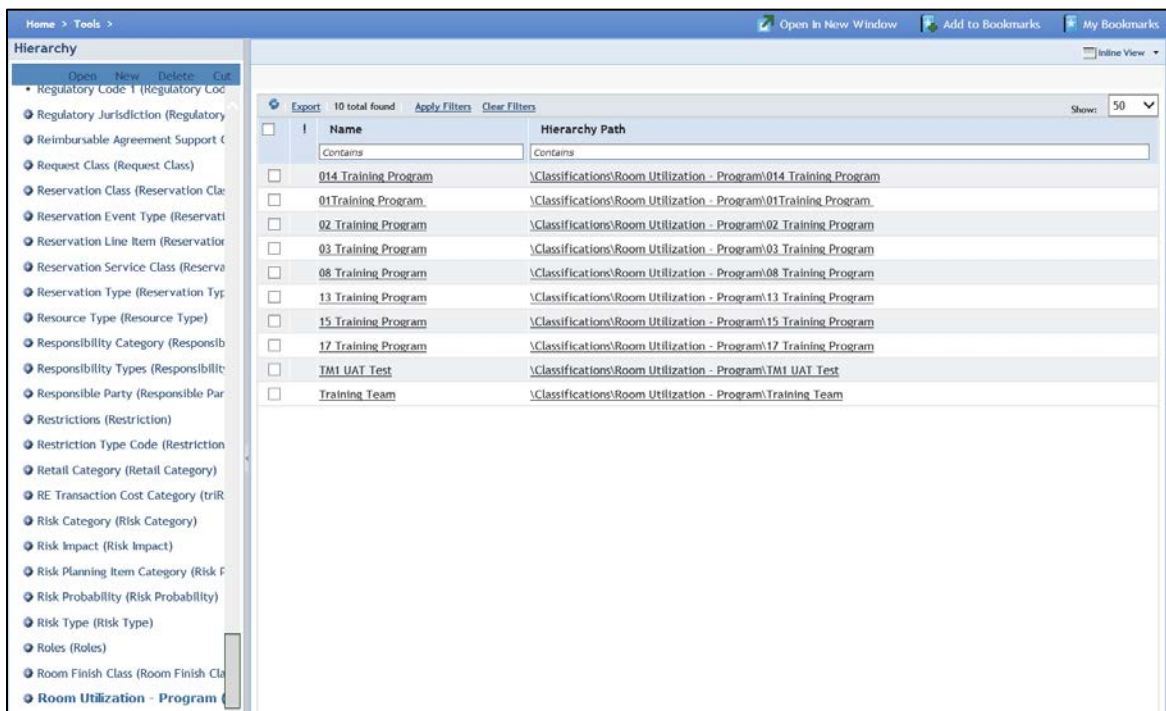
Your department has determined that it wants to perform chargeback allocation for the space it occupies. You must create a Room Utilization Program to facilitate this chargeback to the appropriate program.

#### Setup

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

#### Steps

- A. Navigate to the Tools > Administration portal landing page.
  1. Click the **Classifications** option.
  2. In the list of **Classifications** on the left, locate and click on **Room Utilization - Program**.



- B. Create a new **Program** record.
  1. In the **Hierarchy** section, click **New**.
  2. In the list of location types, click **Room Utilization Program**.

C. Complete the General tab.

1. In the **General** section, in the **Name** field, enter **## Temporary Training Program**, where **##** is your student number.
2. Click the **Create** action.

The screenshot shows a web application window titled "Room Utilization Program". At the top, there are tabs for "General", "System", "Work Flow Instance", "Includes", and "Associations". A "Create" button is visible in the top right corner. Below the tabs, a message states: "(Required): Complete the classification details. Use the notes section to describe when the classification should be used." The "General" section contains several fields: "ID" (empty), "Status" (empty), "Name" (containing "04 Training Program"), "Description" (empty text area), "Color" (with a color picker icon), and "Hierarchy Path" (empty). Below the "General" section is a "Classification Notes" section with a rich text editor toolbar and an empty text area. At the bottom of the form, there is another "Create" button and a close "x" button.

## ACTIVITY 2.2 CONTINUED

### Assign Chargeback and Space Utilization to a Space

#### Scenario

Your department has determined that it wants to perform chargeback allocation for the space it occupies.

#### Setup

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

#### Steps

- D. Navigate to the Portfolio > Locations portal landing page.
  1. Locate the **Space** record you created earlier by expanding the **Building** and **Floor** records in the hierarchy on the left side of the screen.

- Click **## Space**, where **##** is your student number, and select the **Open** option in the hierarchy panel.

Space: 01 Space

General Contact Details Graphic Details Allocation Finishes Regulatory Maintenance

(Required): General Information for this Space.

**General**

ID: 1000012 Status: Revision In Progress Image

Name: 01 Space

Description: Temporary use for training

Hierarchy Path: \Locations\999-Training Facility\01 Training Building\1st floor\01 Space

E. Revise the Space record for chargeback allocation.

- Click the **Revise** action.
- Navigate to the **Allocation** tab.
- In the **Chargeback Allocations** section, click the **Find** option.

Related Reports: -Select- Internal Organizations

Export 3 total found Apply Filters Clear Filters Show: 50

| Hierarchy Path                      | Name             | ID       | Short Name     | Type       | Status   |
|-------------------------------------|------------------|----------|----------------|------------|----------|
| Contains                            | Contains         | Contains | Contains       | Contains   | Contains |
| \Organizations\State of Arizona     | State of Arizona | 1000501  |                | Government | Active   |
| \Organizations\State of Arizona\ADA | ADA              | 1000502  | Administration | Agency     | Active   |
| \Organizations\State of Arizona\DEA | DEA              | 1000525  |                | Agency     | Active   |

- Select the checkbox for **\Organizations\State of Arizona\ADA**.
- Click **Ok**.
- In the **Space Utilization** section, click the **Add** option.
- In the **General** section, in the **Name** field, enter **## Space Allocation**, where **##** is your student number.
- In the **Details** section, in the **Program** field, click the magnifying glass icon.
- Click on **## Training Program**, where **##** is your student number.
- In the **Area** field, enter **500**.
- Click the **Create** action.

**Space Utilization** Add Remove

Export 1 total found Show: 10

| Program  | Use | Area | Percent   |
|--|-----|------|-----------|
| <input checked="" type="checkbox"/> 01Training Program |     | 500  | 0 percent |

- Click the **Activate** action.



## 3. Reservation Functions

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### Learning Objectives

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In this lesson, you will:

- Examine the process of reserving space

### Lesson Overview

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This lesson identifies the processes involved in the reservation of spaces. TRIRIGA users can manage the distribution of shared locations. Space Reservations can be created in the same way requests are created. The system will generate work tasks as required for events.

### 3.1. Managing Space Reservation

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Location reservations can be created in TRIRIGA to capture and track the details of a scheduled event, including the timing, recurrence, and other event details. Using the Need Space/Event Reservation request form in Request Central, users can enter the details for requested events. The reservation process can trigger the automatic generation of the work tasks required to setup before and breakdown after the event.

### State Process Overview

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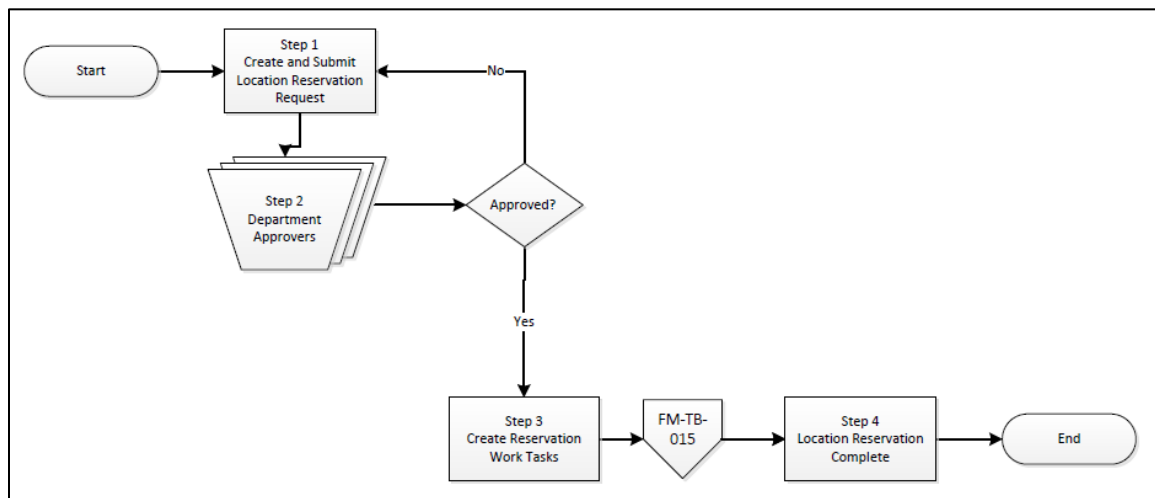
The steps below describe the statewide process. Your agency may have additional requirements. This process is referenced in To Be ID FM-TB-020 (Manage Space Reservations) and represented by CROSSREF below.

1. The requestor creates a Space/Event Reservation request. The location, date, time, equipment reference, and any additional available information pertaining to the reservation. The Event Reservation box must be checked for the Event Reservation Information section to be available. The Reservable field on the equipment/asset record must be checked in order for the equipment to be considered reservable by the system. If the box is not checked, the equipment record will not be displayed in reservation search fields. Upon completion of the data entry, the reservation request is submitted and routed for approval. The process continues with Step 2: Department Approvers.
2. The Space/Event Reservation request record is reviewed by a designated approver(s). If the location requested is not reservable, is not available for the date requested, is not entitled to the requestor, or if the approver needs additional information, the reservation request is rejected and returned for resubmission or termination in Step 1: Create and Submit Space/Event

Reservation Request. If the request is determined to be valid, the record is approved and the process continues. The process continues with Step 3: Create Reservation Work Tasks.

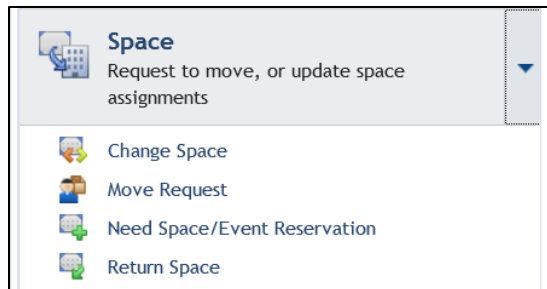
3. Upon approval of the Space/Event request, reserve work tasks (for services such as equipment setup, room layout changes, room breakdown, etc.) are created and auto-assigned based on the request classification and service plan. The process of managing the performance of the individual work tasks continues with process FM-TB-015.
4. Once the work has been performed, the Space/Event Reservation request record can be completed. The availability of the location is updated for reference on future reservation requests.

**Figure 4: Manage Space Reservations (FM-TB-020)**



## Need Space/Event Reservation

Space/Event Reservations can be tracked and managed for any location in TRIRIGA. Additionally, each request form provides fields that can be used to define the association of a single request to multiple locations.



The process of reserving a space starts by navigating to the Request Central portal, and from there, to the Space group of request types. Selecting the Need Space/Event Reservation option from the Space group will create a new request.

### *General*

On the Need Space form, the Event Details section on the General tab is used to identify the subject, duration, recurrence, and other details for the reservation. The required fields on the request include:

- **Building**
- **Organization**
- **Service Request**
- **Event Name**
- **Event Type**
- **Intended Use**
- **Start Date**
- **End Date**

When the reservation request details are complete, clicking the Submit action will submit the event request and approval (if approval rules are defined). Upon completion of the review (if any), the record

will be save with a status of Issued. Issued reservation records are read-only.

The screenshot displays a web-based form for creating a reservation request. At the top, there are navigation tabs: General, Graphics, Notifications, Notes & Documents, System, Work Flow Instance, Associations, and Audit Actions. On the right, there are buttons for 'Create Draft', 'Submit', and a close icon 'x'. Below the tabs, an instruction reads: '(Instruction): To submit a Need Space request, complete the form below then click Submit.' The form includes several sections:

- Request Details:** Contains a radio button for 'Request is for' (Me selected, Someone Else unselected), a checkbox for 'Need Space/New Hire', and a checked checkbox for 'Event Reservation'. Below this are fields for 'Building', 'Floor', 'Room', and 'Organization', each with a search icon.
- Describe Your Request:** A large empty text area for describing the request.
- Event Reservation Information:** Includes fields for 'Event Name', 'Event Type', and 'Number of People' (set to 0). It also has date/time pickers for 'Reservation Start/End Date/Time' and 'Alternate Start/End Date/Time (1) & (2)'. There are also fields for 'Intended Use', 'Special Requirements', and 'Additional Instruction'.
- Service Request:** A section with a table showing '0 total found'. The table has columns for 'Name' and 'Description'. Below the table, it says 'No data to display'. A 'Show' dropdown is set to '10'.

### Submission

Upon submission of the reservation request, the system will automatically send the requestor an email notification to confirm receipt of the request. The notification includes basic information about the received request as well as a link to the record.

### Activation

Once issued, the system will automatically generate and assign any related Reservation Work Task records (as defined by the related Service Plan).

### Complete

The reservation will automatically change to a status of Complete when the resulting event project/tasks are completed. If the associated request class is configured for surveys, then a survey request will be sent for the requestor to complete in TRIRIGA.

### ACTIVITY 3.1

## Create a Space Reservation

### Scenario

You are in charge of reserving a classroom for a training class. You will create the Need Space/Event Reservation process by creating a Need Space/Event Reservation form.

### Setup

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

### Steps

- A. Navigate to Request Central.
  1. Click the **Requests** tab.
  2. Click on the Manage Requests option in the sub menu.
  3. In the Related Links – Requests section, click **Submit Request**.
- B. Create a Need Space/Event Reservation request.
  1. In the Request Central section, click the **arrow** to expand **Space**.
  2. Click **Need Space/Event Reservation**.
- C. Complete the Need Space form.
  1. At the top of the form, click the **checkbox** for **Event Reservation**.

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

★ Request is for
 Me
 Someone Else
Need Space/New Hire 
Event Reservation

2. In the **Building** field, click the **magnifying glass** lookup icon.
3. Select the **radio button** for the **ST ## Training Building**, where **##** is your student number.
4. Click the **OK** action.
5. In the **Floor** field, click the **magnifying glass** lookup icon.
6. Select the **radio button** for the **2<sup>nd</sup> floor**.
7. Click the **OK** action.
8. In the **Room** field, click the **magnifying glass** lookup icon.
9. Select the **radio button** for the **## Space**, where **##** is your student number.
10. Click the **OK** action.
11. In the **Organization** field, click the **magnifying glass** lookup icon.
12. Select the **radio button** for **ADA**.
13. Click the **OK** action.

14. In the **Describe Your Request** section, in the text box, enter **Room reserved for EUT Training**.
15. In the Service Request section, select the **radio button** for **Need Space/Event Reservation**.
16. In the **Event Name** field, enter **EUT Training ##**, where **##** is your student number.
17. In the **Event Type** field, enter **EUT Training**.
18. In the **Reservation Start Date/Time** field, select **today's date** from the calendar.
19. In the **Reservation End Date/Time** field, select **today's date** from the calendar. Adjust the time by **2 hours**.

20. Click the **Create Draft** action.
- D. Submit the reservation request.
1. Click the **Submit** action.
  2. When you are finished, click the **Home** tab to return to the Home Page.

## 3.2. Manage Move Project

In TRIRIGA, the management of moves includes managing move service requests, planning scheduled moves, and planning strategic moves. The move manager is responsible for moving people, assets, and equipment within an organization to ensure that move requests and move projects are implemented as required. The move planner is responsible for assembling move projects so that strategic space plans or facility move plans are organized with minimal cost and disruption.

A move request follows the service management process. The request is submitted by the requester, assigned to a move task or move project, and completed when the move is complete.

### State Process Overview

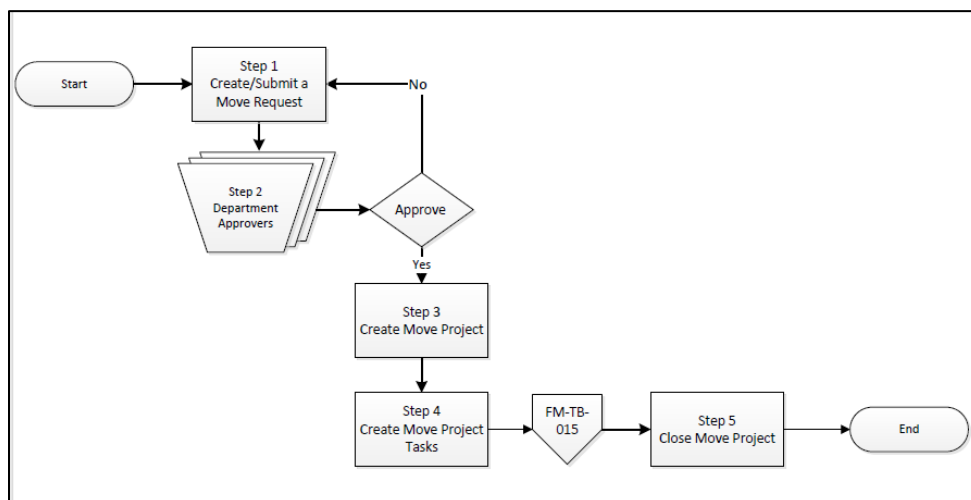
The steps below describe the statewide process. Your agency may have additional requirements. This process is referenced in To Be ID FM-TB-019 (Manage Move Project) and represented by Figure 5 below.

1. A move request can be initiated using self-service or call center functions, allowing employees to directly request moves. The requestor can complete an online form to enter the request. The request form prompts the user for the type of move, the employee(s) being moved, the from

location and to location of the move. The system sends a notification message to the requestor confirming receipt of the request and provides the requestor with a portal view to monitor the status of the submitted request if submitted via self-service. The process continues with Step 2: Department Approvers.

2. The move request record is reviewed by a designated approver(s). If the move request is not acceptable, or if the approver is in need of additional information, the request will be rejected and returned for resubmission or termination in Step 1: Create/Submit Move Request. If the request is determined to be valid, the record is approved and approval notification is sent to the requestor. Upon approval, the process continues to Step 3: Create Move Project.
3. Move requests are addressed through the execution of move projects. The move project provides the move coordinator with the functions required to manage and execute the move, including management of costs, coordination of tasks, and updates to drawings and documents. Upon creation of the project, the process continues with Step 4: Create Move Project Tasks.
4. The move project serves as a container for the tasks that need to be performed. Tasks can be generated for the project based on pre-defined move project templates. The process of managing the performance of the work task continues with process FM-TB-015.
5. Once the move project tasks are completed, the move coordinator can manage the closeout of the move project as required. Move project closeout includes management of and revision to related CAD drawings. Upon closeout of the work, the system is automatically updated to display the new employee locations.

**Figure 5: Manage Move Project (FM-TB-019)**



## Move Request

A move request can be submitted by employees or space planners to initiate the process of moving employees and their related assets (PC, phone, etc.). A move request can be managed in the system from the initial submission through delivery or fulfillment of the move transaction.

The screenshot displays the 'Move Details' form in the IBM TRIRIGA system. The form is titled 'Move Services: 1000000-0' and includes navigation tabs for 'General', 'Notifications', 'Notes & Documents', 'System', 'Work Flow Instance', 'Associations', and 'Audit Actions'. Action buttons for 'Submit', 'Save', 'Save & Close', and 'More' are visible. The 'Move From Location' section contains the following fields: 'From Building' (999 Training Building), 'From Floor' (Floor 01), 'From Room' (100), 'Organization' (ADA), 'Proposed Move Date' (01/12/2015), and 'Reason For Move'. The 'Move To Location' section includes 'To Building', 'To Floor', and 'To Room' fields. At the bottom, there is a checkbox for 'Include Requested For In the Move' and a 'Total Estimated Cost' field showing '\$.00'. A 'Select From Floor Plan' link is located in the top right corner of the form area.

The move request must include information about the location from which the person is moving and the organization that is responsible for the location. When a move request is submitted, a series of automatic and manual activities are initiated that are managed by the move manager.

## Move Project

Move projects are often generated automatically, as a result of the Move Request process. A move project is associated with one or more move line item records that contain the details of the move. Move projects can be based on an applied project template which may include more information, such as the planned start date and estimated costs.



# Terminology

The terms listed below are used throughout this training guide.

**Table 1: Terminology**

| Term                 | Description  |
|----------------------|--|
| Approvals            | Ensure that created and modified records meet the defined business requirements.   |
| Dashboard            | Default page for each security group or user role that provides a snapshot of current activity.  |
| 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.                 |
| 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.  |
| Landing Pages        | Contain actions organized into menus and sections of relevant information.   |
| 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.   |
| Requests portal      | Used to issue, manage, and track various requests.   |
| Space Management     | Used to maintain space plans and track space utilization data in buildings and structures. Also possible to manage the people and assets that are in the space and coordinate property transactions in the system. |