

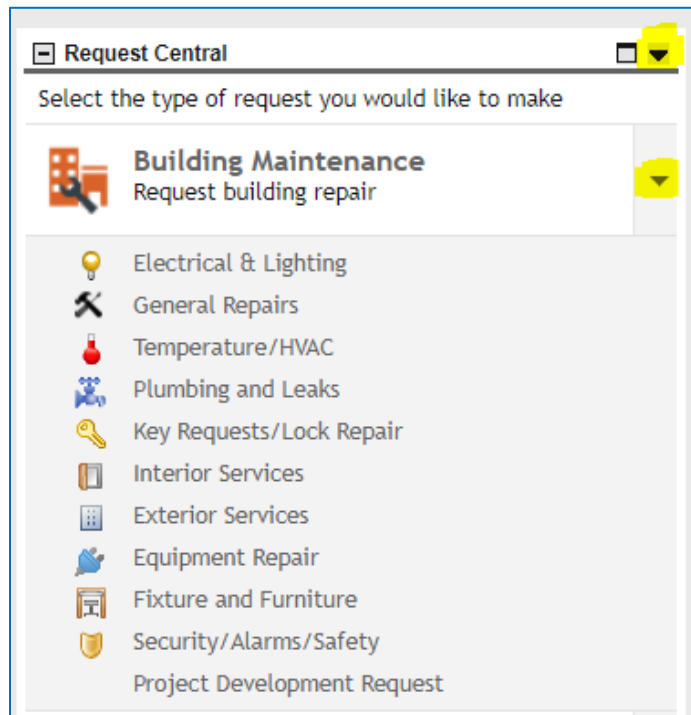
TRIRIGA QUICKSTART GUIDE

This guide is meant to help get you oriented upon signing into TRIRIGA, if you feel you need more assistance, need an account, or forgot your password, please contact tririga-admin@pps.net.

1. Sign-in to TRIRIGA at <https://pps.ecifm.net/> and bookmark the page.
2. Upon signing in, your home page will display your dashboard. This should contain most of the things that are useful to you.
 - a. **HELP**: In the upper left hand corner there is a box with a picture of a question mark. This contains more detailed user manuals for putting in a work request, looking up space data, and using reports.
 - b. **WORK REQUESTS**: Below the help portal, there is a portal called “request central”. This is where you put in work requests.
 - c. **REPORTS AND QUERIES**: On the right panel of your dashboard there are portals with links to reports that may be important to you Such as Space data, or work task data.
 - d. **PORTAL SECTIONS**: Adding portal sections allows one to customize a dashboard for a team so the information they need is in front of them when logging in to TRIRIGA.
 - e. **LOADING DATA**: Loading data into the database allows you to update existing data sets or upload new data sets.

3. WORK REQUESTS

- a. Ensure that both arrows highlighted in yellow are pointing down as shown to the right.
- b. Select the type of work request you are submitting from the list provided

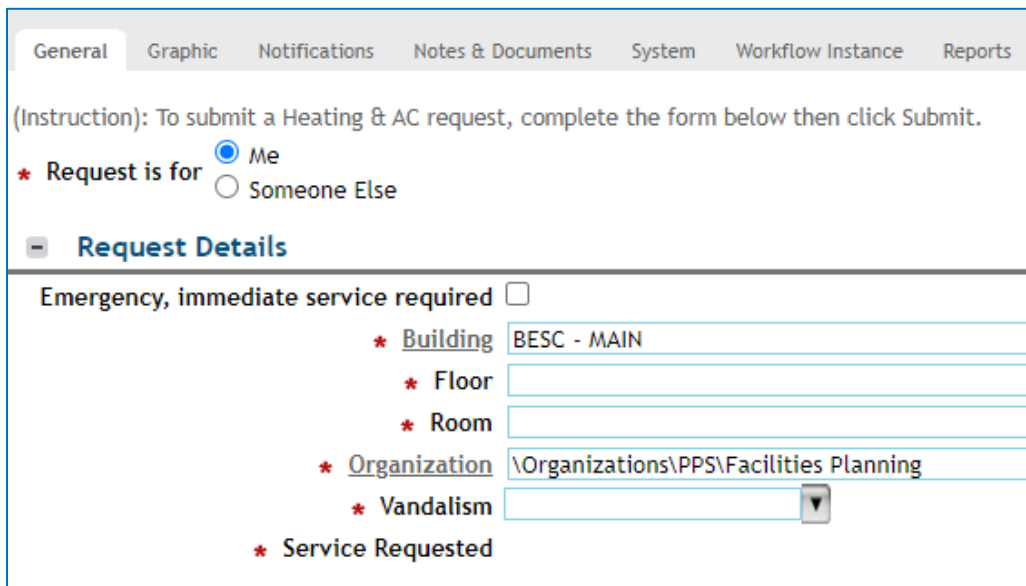


Request Central

Select the type of request you would like to make

Building Maintenance
Request building repair

- Electrical & Lighting
- General Repairs
- Temperature/HVAC
- Plumbing and Leaks
- Key Requests/Lock Repair
- Interior Services
- Exterior Services
- Equipment Repair
- Fixture and Furniture
- Security/Alarms/Safety
- Project Development Request



General Graphic Notifications Notes & Documents System Workflow Instance Reports

(Instruction): To submit a Heating & AC request, complete the form below then click Submit.

* Request is for ☒ Me ☐ Someone Else

Request Details

Emergency, immediate service required ☐

* Building BESC - MAIN

* Floor

* Room


* Organization \Organizations\PPS\Facilities Planning

* Vandalism

* Service Requested

c. After selecting the work request type, another screen will pop up, like the one to the left.

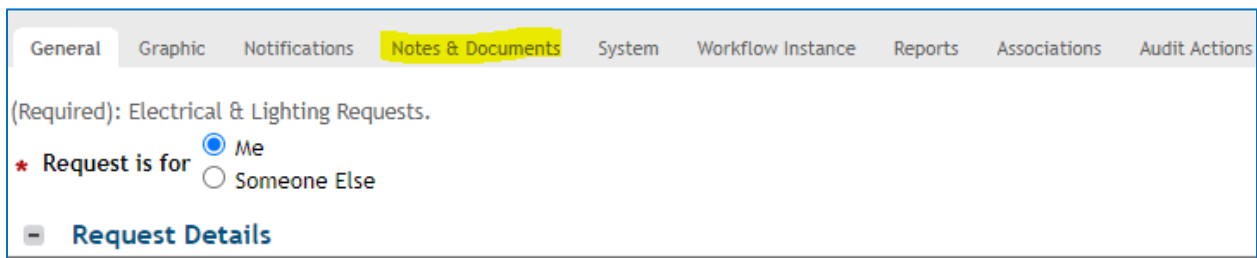
b. Begin by selecting whether the request is for you, or if you're submitting it for someone else. (Custodian, Maintenance technician)

- c. Select the location where the work request is needed by using the magnifying glass  on the far right side of the location fields. You can

Select From Floor Plan

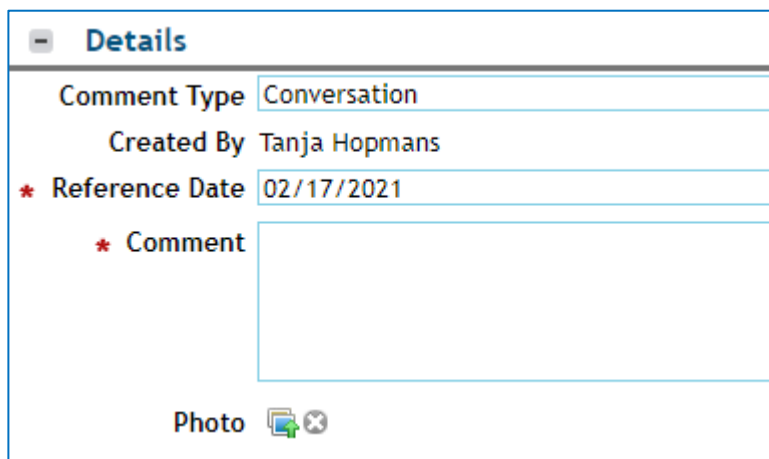
also select the location from a floor plan by selecting the following in the upper right.

- d. Under the Service Request section, select the option that best represent your type of request
- e. Under Describe Your Request, write a succinct description of your request. Who, When and Where and How.
- f. If you would like to attach a photo select the “notes and documents” tab highlighted in yellow below.



The screenshot shows a tabbed interface with the following tabs: General, Graphic, Notifications, Notes & Documents (highlighted in yellow), System, Workflow Instance, Reports, Associations, and Audit Actions. Below the tabs, the text "(Required): Electrical & Lighting Requests." is displayed. Underneath, there is a radio button group for "Request is for" with options "Me" (selected) and "Someone Else". At the bottom, there is a section titled "Request Details" with a minus icon to its left.

- g. Under the Comments section, select add  , Click Comment, a new window will pop up.



The screenshot shows a "Details" window with the following fields: "Comment Type" with a dropdown menu showing "Conversation", "Created By" with the text "Tanja Hopmans", "Reference Date" with a date picker showing "02/17/2021", and a "Comment" text area. At the bottom, there is a "Photo" label next to an upload icon (a green square with a white plus sign) and a close icon (a circle with an X).

h. Type a description of your photo in the Comment box

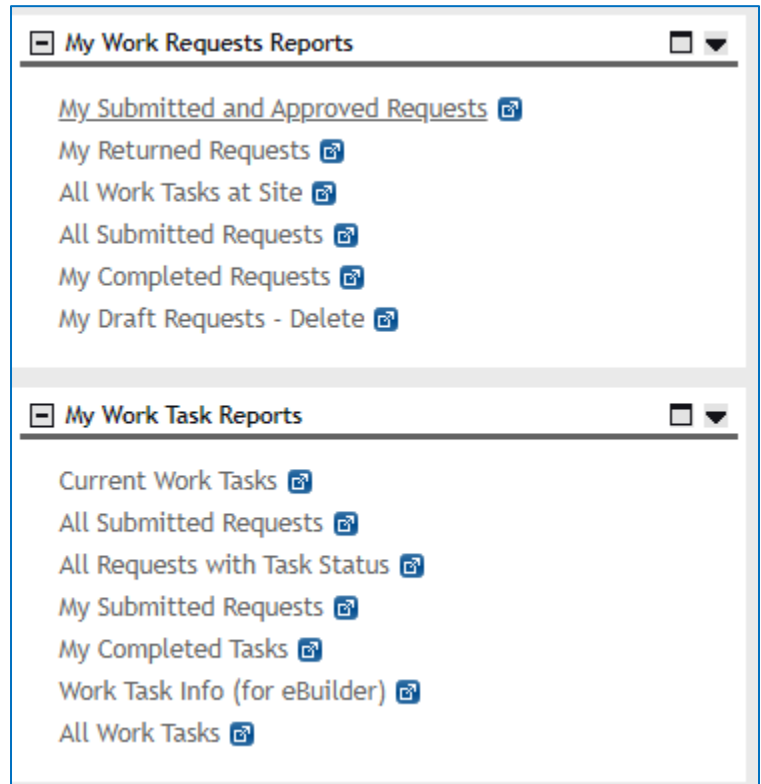
i. Select the upload icon next to photo, and you will prompted to select a file.

j. After uploading the photo, go back to the General tab.

- k. If you're ready to submit your request select create draft,  and then select Submit 

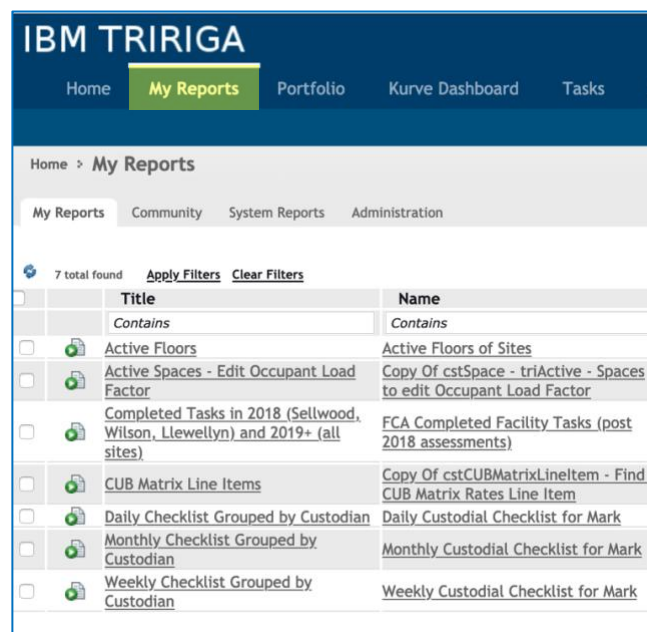
4. REPORTS AND QUERIES

- a. To get back to your Dashboard/home screen simply select the Home Tab underneath “IBM TRIRIGA” in the top left corner of your page.
- b. On the right side of your Dashboard, there are a series of portals. That might look like this:



5. CREATING A REPORT FROM AN EXISTING SYSTEM REPORT

- a. To get to the reports area, in your Dashboard go to the My Reports tab and you'll see this:



- b. Click on the **System Reports** tab to find a report to copy. Either scroll down or you can use any of the search functions in the top row. For this example, we will use the **Name** column to search for “space” and hit return, which will search for the reports with the word in its name.

- c. Check the box ☒ next to the report you wish to copy and click on **Copy as My Report** in the upper right area of the Reports page.

IBM TRIRIGA

Home My Reports Portfolio Kurve Dashboard Tasks Space Maintenance Projects Requests

Home > My Reports

My Reports Community System Reports Administration

1 / 22 1099 total found Apply Filters Clear Filters

	Title	Name	Tag	Module	Business
<input type="checkbox"/>	Contains	space	Contains	Contains	Contains
<input type="checkbox"/>		trSpaceStandardsSpec - trSpecification - Entitlement Role Query - Space Standard		triSpecification	Space S
<input type="checkbox"/>		East Sylvan - space verification		Location	Property
<input type="checkbox"/>		East Sylvan - check space dimensions		Location	Space
<input type="checkbox"/>		East Sylvan - space verification		Location	Space
<input type="checkbox"/>		Space query - Restrooms		Location	Space
<input type="checkbox"/>		cstSpace - Query - Get all Space	KS	Location	Space
<input type="checkbox"/>		cstSpace		Location	Space
<input type="checkbox"/>	% RE Contract Utilization - Space Use Agreements (Score)	triREContractFact - Metric - RE Contract Utilization - Space Use Agreements (Score)		triMetricFact	Real Es
<input type="checkbox"/>	% RE Contract Utilization - Space Use Agreements (Score)	triREContractFact - Metric - RE Contract Utilization - Space Use Agreements - US Gov (Score)		triMetricFact	Real Es
<input type="checkbox"/>	% RE Contract Utilization - Space Use Agreements by Organization	triREContractFact - Related Report - Real Estate Contract Utilization - Space Use Agreements by Organization		triMetricFact	Real Es
<input type="checkbox"/>	% RE Contract Utilization - Space Use Agreements by RE Contract Type	triREContractFact - Related Report - Real Estate Contract Utilization - Space Use Agreements by RE Contract Type		triMetricFact	Real Es
<input type="checkbox"/>	Action Form Log	cstReserveMeetingSpaceConfirmSubmit - Query - Action Form Log		triActionForm	Meeting
<input type="checkbox"/>	Activate Spaces Loaded via CADi	cstSpace - Editable - Activate Spaces Loaded via CADi	Tanja	Location	Space
<input type="checkbox"/>	Active Building records for Building Query for Space Audit Find	triBuilding - Active Building records for Building Query for Space Audit Find		Location	Building
<input type="checkbox"/>	Active records for Space Lookup	triSpace - Active records for Space Lookup		Location	Space
<input type="checkbox"/>	Active Reservations	triResource - Display - Location Space - Active Reservations		triIntermediate	Resource
<input type="checkbox"/>	Active Scenarios	triSpaceScenario - Navigation - Space Scenario		triPlanning	Space S
<input type="checkbox"/>	Active Spaces - Edit Occupant Load Factor	cstSpace - triActive - Spaces to edit Occupant Load Factor	Tanja Occupancy	Location	Space
<input type="checkbox"/>	Additional Location Records	pps - space - Location records		Location	Space

<input type="checkbox"/>			All Buildings with Reserveable Spaces	cstBuilding - Find - All Buildings with Reservable Spaces
<input checked="" type="checkbox"/>		C	All Buildings with Space and Floor Capacity	cstBuilding - All Buildings with Space and Floor Capacity - Kurve Starter

Open In New Window Add to Bookmarks My Bookmarks

New Copy Delete Copy as My Report Share as Community

Show: 50

Form	Display Type	Object Label
------	--------------	--------------

- d. Now, if you go to the **My Reports** tab, this report should be in your personal set of reports. Now, if you click on the Title or Name of the report it will open the Report Editor in a separate window. This is where you can fine tune the report to fit your needs.

Home My Reports Portfolio Kurve Dashboard Tasks Space			
Home > My Reports			
My Reports Community System Reports Administration			
8 total found Apply Filters Clear Filters			
<input type="checkbox"/>	Title	Name	Tag
<input type="checkbox"/>	Contains	Contains	Cont
<input type="checkbox"/>	Active Floors	Active Floors of Sites	Mark
<input type="checkbox"/>	Active Spaces - Edit Occupant Load Factor	Copy Of cstSpace - triActive - Spaces to edit Occupant Load Factor	Tanja
<input type="checkbox"/>	All Buildings with Space and Floor Capacity	Copy Of cstBuilding - All Buildings with Space and Floor Capacity - Kurve Starter	Kurve
<input type="checkbox"/>	Completed Tasks in 2018 (Sellwood, Wilson, Llewellyn) and 2019+ (all sites)	FCA Completed Facility Tasks (post 2018 assessments)	Tanja
<input type="checkbox"/>	CUB Matrix Line Items	Copy Of cstCUBMatrixLineItem - Find - CUB Matrix Rates Line Item	
<input type="checkbox"/>	Daily Checklist Grouped by Custodian	Daily Custodial Checklist for Mark	FOM,
<input type="checkbox"/>	Monthly Checklist Grouped by Custodian	Monthly Custodial Checklist for Mark	FOM,
<input type="checkbox"/>	Weekly Checklist Grouped by Custodian	Weekly Custodial Checklist for Mark	FOM,

- e. You can edit the **Name, Header, Description, ID or Tags** to help you find the report more easily.

Copy Of cstBuilding - All Buildings with Space and Floor Capacity - Kurve Starter

My Report Columns Order & Group Filters Advanced History Revisions [Run Report](#) [Save](#) [Save & Close](#)

Step 1 of 7 (Required):

My Report

Name: Training Buildings Capacity ID: Tag: Training

Header (Title): All Buildings with Space and Floor Capacity - TRAINING

Description: All buildings contained within school district records including space and floor capacity of each building.

Type: Report

Track History

Created By: Sanchez, Mark - 031698 Modified By: Modified Date: 02/22/2021 Object Label: In Progress

Revision: 1

Business Objects Options Related Reports Security

Business Object:	Module	Business Object	Form	Association Type
<input checked="" type="radio"/> -Location	Building	Building	-	Is Parent Of
<input type="radio"/> -Location	Floor	Floor	-All-	Is Parent Of
<input type="radio"/> -Location	Space	Space	-All-	Is Parent Of

[Add Business Object](#) | [Edit](#) | [Remove](#)

- f. Down in the lower tabbed section is where you can really start to make this your own report in Tririga. You can add/remove Business Object associations to add information to the report, set options, see any related reports that might be associated with this one and set security access for the report.

Business Objects Options Related Reports Security

Business Object:

Module	Business Object
<input checked="" type="radio"/> -Location	Building
<input type="radio"/> -Location	Floor
<input type="radio"/> -Location	Space

- g. To add the Property module to the report, select the **Add Business Object**

Add Business Object option to the right. Scroll down to find **Property (triProperty)** and click OK OK.

Business Object [X] OK | Cancel

Module: Location

Business Object:

- Floor (triFloor)
- Installation (triInstallation)
- Land (triLand)
- Location (Location)
- Planned Floor (triPlannedFloor)
- Planned Space (triPlannedSpace)
- Property (triProperty)**
- Proposed Site (triProposedSite)
- Space (triSpace)

Associated Options:

- h. You should now see the Property Business Object in the list. Now you can add any of the associated data fields from that Business Object to your report.

Business Objects Options Related Reports Security

Business Object:

	Module	Business Object
<input checked="" type="radio"/>	-Location	Building
<input type="radio"/>	-Location	Property (triProperty)
<input type="radio"/>	-Location	Floor
<input type="radio"/>	-Location	Space

- i. If we go to the upper set of tabs, the various tabs give us the power to add more information to a report, group things, add filters and find any associations to other reports.

My Report **Columns** Order & Group Filters Advanced History Revisions

Step 2 of 7 (Required):

Select a Business Object to show associated columns

Business Object:

	Module	Business Object	Form	Association Type
<input checked="" type="radio"/>	-Location	Building	Building	=
<input type="radio"/>	-Location	Floor	-All-	Is Parent Of
<input type="radio"/>	-Location	Space	-All-	Is Parent Of

- j. If a Business Object is added to a report, then we can use any of those Objects to be included as a column in the report. If we click on the **Columns** tab we should see:

Columns:

General (General)

Field Label ▼	Field Name ●
<input type="checkbox"/> !	triUserMessageFlagTX
<input type="checkbox"/> Accounting Cost Center	triCostCenterTX
<input type="checkbox"/> Address	triAddressTX
<input type="checkbox"/> Add To Location Chargeback Organization	triMoveAddToOrgBL
<input type="checkbox"/> Annual Energy Use	triSMSTupEnergyUseNU
<input type="checkbox"/> Annual Lease Costs	triSMSTupLeaseCostsNU
<input type="checkbox"/> Annual Lease Costs Base	triSMSTupLeaseCostsNUBase

- k. Since we added the **Building Business** object, we can select that radio button and it will show us all of the Columns available for Display in the report. In this example, let's add **Parent Property** so we know which Property is being referred to in this

	Module	Business Object	Form	Association Type
<input checked="" type="radio"/>	-Location	Building	Building	=
<input type="radio"/>	-Location	Floor	-All-	Is Parent Of
<input type="radio"/>	-Location	Space	-All-	Is Parent Of

Select one or more columns from the General section to use on the report. To include smart section columns, select Add Business Object in the first tab.

<input type="checkbox"/> Parent	Parent
<input checked="" type="checkbox"/> Parent Building	triParentBuildingTX
<input type="checkbox"/> Parent Floor	triParentFloorTX
<input checked="" type="checkbox"/> Parent Property	triParentPropertyTX
<input type="checkbox"/> Parking Spaces (Covered)	triParkingCoveredNU

report. Check the button ☒ next to Parent Property . Note, it will automatically add Parent Property to the Display Columns on the right side of the screen. If you click Save **Save** and Run Report, **Run Report** it should now be added to the report. (note: if you try to run the report before clicking Save the change won't be reflected in the report.

- l. You can also change the order of the columns in the Display Columns section using the options in the bar.

[Move up](#) | [Move down](#) | [Move to top](#) | [Move to bottom](#) | [Remove](#)

- m. If you wanted to order or group any of the data, you can do that in the **Order & Group** tab next to the Columns tab. Let's Group By

Building ID and Gross Area.
Select both of those

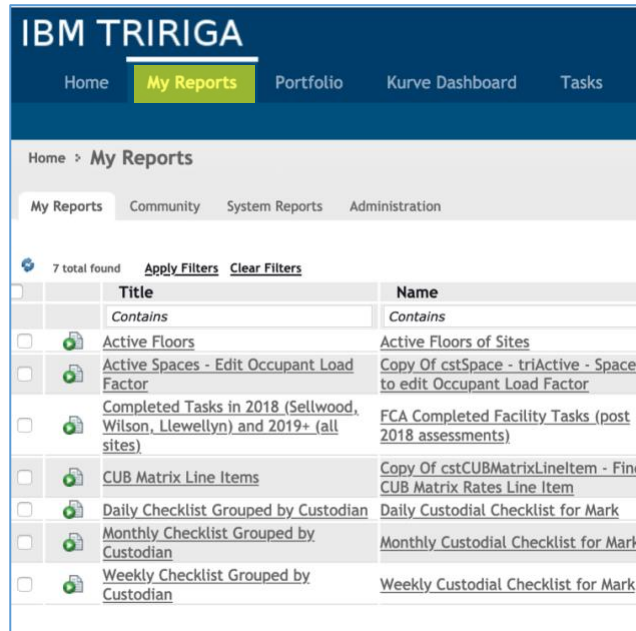
and click the right arrow. Click **Save** and **Run Report**. It will now group the data according to these parameters.

- n. You can also filter the data within a report. There are User Filter Columns and System Filter Columns. Let's add a System Filter Column using

'Rentable Area' from the Building Business Object. Set the **Join Operator** as 'AND', the **Filter Operator** as 'More Than or Equals' and **Value** as '15000'.

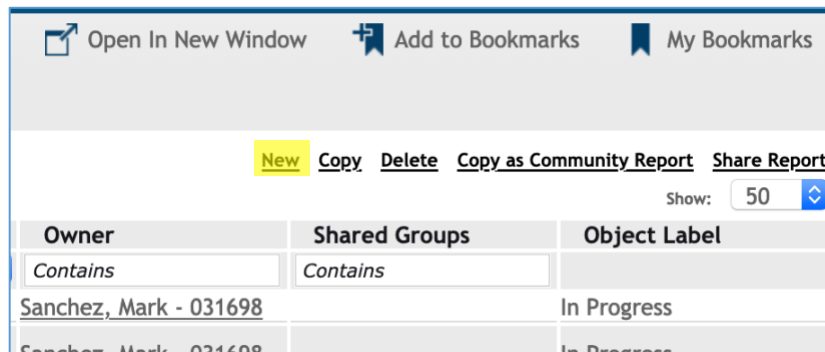
Click **Save** and **Run Report**. You should only see some selected rooms at BESC where the 'Rentable Area' is greater than 15000ft².

6. CREATING A REPORT FROM SCRATCH



a. To get to the reports area, in your Dashboard go to the **My Reports** tab.

b. Go to the System Reports section. On the right side of the page, you will see your options, go ahead and select **New**.



c. A new window will pop up. Filling in the highlighted fields will give any possible user the information they need to understand what is included in this report and what it is querying. Click **Save** when you're done adding information.

- d. Now, in the lower half of the page, move to the columns tab and select the

Business

Objects tab. This

will show which columns will be pulled from data in TRIRIGA in the report. For this report, we will

add the triSurvey and Location Business

Objects so we

can pull data from these data sets. Click **Add**

Business Object

and the menu will pull up to select the Module, Business Object and Form you are seeking data. Select **Module: triSurvey** with **Business Object:**

Custodian Checklist (cstCustodianChecklist) and **Form: -All-**. Click **OK** and the module will be added to your Business Objects tab. Then, we will also

need to select

Module:

Location

with

Module	Business Object	Form	Association Type
<input checked="" type="radio"/> -triSurvey	Custodian Checklist	-All-	-
<input type="radio"/> -Location	Building	-All-	-

Business Object: Building. Click **OK** and both should be in your Business Objects tab.

- e. Now, we need to select the columns that will be displayed in the report and pulled from the Business Object Modules in TRIRIGA. Click on the Columns tab. Whichever Module is selected will show the fields you can choose. Select **Inspected By**,

Date, **ID**, **Name**,

Status and **Checklist**

Type from the **triSurvey** module and **Parent Property** from the **Location**

Module	Business Object	Form	Field	Report Label	Width
<input type="radio"/> -triSurvey	Custodian Checklist	-All-	<input type="radio"/> Inspected By (cstInspectedByTX)	Inspected By	%
<input checked="" type="radio"/> -Location	Building	-All-	<input type="radio"/> Date (cstDateDA)	Date	%
<input type="radio"/> -Location	Building	-All-	<input type="radio"/> Parent Property (triParentPropertyTX)	Parent Property	%
<input type="radio"/> -Location	Building	-All-	<input checked="" type="radio"/> Work Location (cstLocationTX)	Work Location	%
<input type="radio"/> -Location	Building	-All-	<input type="radio"/> ID (triIDTX)	ID	%
<input type="radio"/> -Location	Building	-All-	<input type="radio"/> Name (triNameTX)	Name	%
<input type="radio"/> -Location	Building	-All-	<input type="radio"/> Status (triStatusCL)	Status	%
<input type="radio"/> -Location	Building	-All-	<input type="radio"/> Checklist Type (cstListTypeLI)	Checklist Type	%

module. Rearrange them as you see fit using the selections on the right side of the window. Click the **Save** button and we can move on.

- f. Now, let's move on to the **Order & Group** tab. In here we can order the results and group the results according to hierarchy within the query. Let's keep this relatively simple (though you can get complex). Move **Inspected By** in the Group By section by clicking on the field and then the **right arrow**. Let's do the same in the Order By section by clicking on **Date** and using the **right arrow**. Click **Save**.

My Report Columns **Order & Group** Filters Advanced History Run Report Save Save & Close x

Step 3 of 7 (Optional):

Order & Group

Group By

- Date
- Parent Property
- Work Location
- ID
- Name
- Status
- Checklist Type

Inspected By

Order By

- Inspected By
- Parent Property
- Work Location
- ID
- Name
- Status
- Checklist Type

Date (ASC)

- g. Let's go to the **Filters** tab. Here, we can use system filters to include/exclude specific records. For this report, we will select **Date, ID, Name, Checklist Type, Work Location, Inspected By** and **Status** in the User selection and **Status, Date** and **Checklist Type** in the System selection from the **triSurvey Module** in the Business Object.

My Report Columns Order & Group **Filters** Advanced History

Step 4 of 7 (Optional):

Select a Business Object to show associated columns

Business Object:

Module	Business Object	Form	Association Type
<input checked="" type="radio"/> -triSurvey	Custodian	-All-	=
<input type="radio"/> =	Building	-All-	
<input type="radio"/> =	Location		


Select one or more columns from the General section to use on the report. To include smart section columns, select Add Business Object in the first tab.

<input type="checkbox"/>	Custodial Storage Room	cstCustodialRoomLI
<input checked="" type="checkbox"/>	Date	cstDateDA
<input type="checkbox"/>	Description	triDescriptionTX

- h. Now, for the right side of the window, you can organize and specify the filters and include/exclude records in the data. Let's keep the User Filter Columns as they are and

User Filter Columns:						Copy Move up Move down Move to top Move to bottom Remove
	Join Operator	Field	Report Label	Filter Operator	Value	
<input checked="" type="radio"/>		Date (cstDateDA)	Date	Before	User Input	
<input type="radio"/>	AND	ID (triIdTX)	ID	Contains	User Input	
<input type="radio"/>	AND	Name (triNameTX)	Name	Contains	User Input	
<input type="radio"/>	AND	Checklist Type (cstListTypeLI)	Checklist Type	Contains	User Input	
<input type="radio"/>	AND	Work Location (cstLocationTX)	Work Location	Contains	User Input	
<input type="radio"/>	AND	Inspected By (cstInspectedByTX)	Inspected By	Contains	User Input	
<input type="radio"/>	AND	Status (triStatusCL)	Status	Contains	User Input	

System Filter Columns:						Copy Move up Move down Move to top Move to bottom Remove
	Join Operator	Field	Report Label	Filter Operator	Conditional	Value
<input checked="" type="radio"/>		Status (triStatusCL)	Status	Not In	No	'Retired'
<input type="radio"/>	AND	Date (cstDateDA)	Date	After	No	01/01/2020
<input type="radio"/>	AND	Checklist Type (cstListTypeLI)	Checklist Type	Equals	No	Monthly

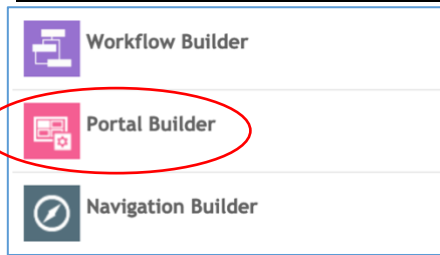
move down to the **System Filter Columns**. Let's change the Filter Operator for Status to **Not In** and enter **'Retired'** in Value to exclude any retired records. In Date, set the Filter Operator as **After** and let's put in a date of **01/01/2020** in Value. This will only include records from TRIRIGA after that date. Now, the Checklist Type, set the Filter Operator as **Equals** and enter **Monthly** in Value. Click **Save and Close** in the upper right corner and we're done. You can now run the report and see the results. If you wish to see the report, click on the  icon with the green play circle and the report will appear in a new window.

For more in-depth understanding of all the ins and outs of reporting in TRIRIGA there are videos:

[TRIRIGA Reporting Training Video 1](#)

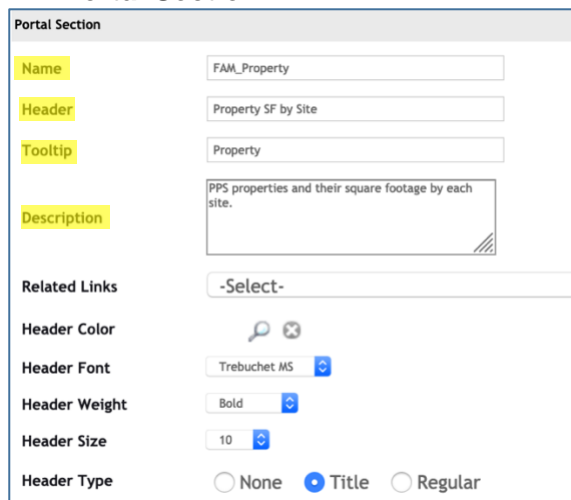
[TRIRIGA Reporting Training Video 2](#)


7. CREATING A NEW PORTAL SECTION




- To get to the reports area, in your Dashboard go to the Tools **Tools** tab and find the Portal Builder tool. Select the Portal Builder.
- In the Portal Builder, we will add a new section by using the Add **Add** button in the upper left.
- In the Portal Builder window that opens, at the

bottom left, click on Portal Sections Library. **Portal Sections Library** Click on **New** **New** and a new window will open where you can create your new Portal Section.



- Fill in the sections needed such as **Name**, **Header**, **Tooltip** and **Description** so that people can understand what this section should be used for in TRIRIGA. We will also be using a query as the data for this portal section. Select the magnifying glass  in the Query **Query** area near the bottom of the window. This will allow us to find the TRIRIGA query in the appropriate Module and Business Object which will feed the data for the dashboard.



- A new window will open up so that we can find our query. Select the Module dropdown and find Location and click on that selection.

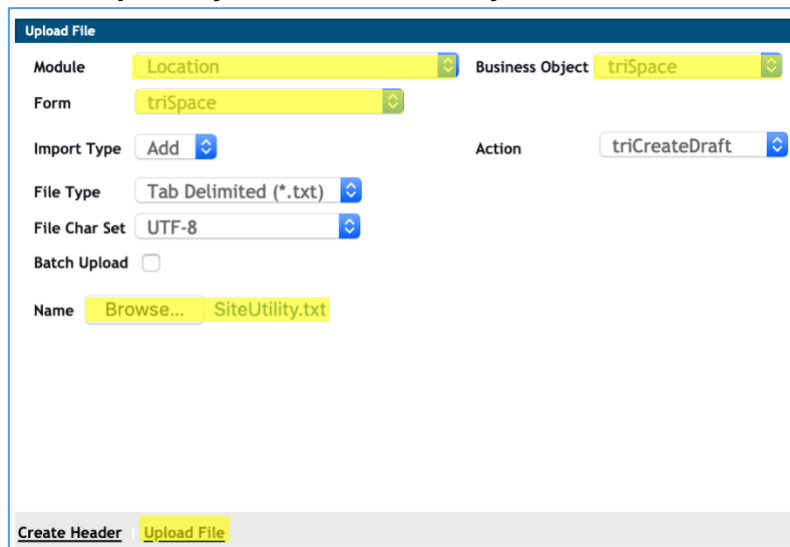
Module **Location**  This will populate the list. Scroll down and find the cstProperty – Find – Get All Property Data query and select that radio button. ☒ **C** **cstProperty - Find - Get All Property Data** Click OK **OK** in the upper right corner. Now the Property query should be listed in the Query section. Click Apply **Apply** and then OK. **OK**

- If you return to the Portal Sections Library, you should be able to find this new section in the list. Select the checkbox ☒ **FAM_Property_Test** next to the Portal Section. If we click the **Add to Portal** **Add To Portal** button it will add this Portal Section into the Portal Layout. Click Save and Close **Save And Close** and this new query will be part of the Portal.

Portal Sections Library			
New	Edit	Delete	
Add To Portal			
Name	Type	Header	Object Label
<input type="checkbox"/> fam			
<input checked="" type="checkbox"/> FAM_Property_Test	Report	Property SF by Site	In Progress

8. LOADING DATA INTO TRIRIGA

- a. To update or upload new data into TRIRIGA you need to navigate to the Data Integrator. Click on the **Tools**  tab. Then under the Utilities area click on **Data Integrator**.  Data Integrator
- b. Choose your appropriate **Module**, **Business Object** and **Form** for your data. This is the part that requires the precision.
 - i. For example: Let's enter a file to update some of the Site Utility space entries for our buildings. So, we would set Module as Location, Business Object as triSpace and Form as triSpace. This will update the data at the space level.
- c. Once you have set those options you can browse for your file and select the **Upload File** option. TRIRIGA will email you to as to whether the file upload succeeded or failed. If it succeeded, you should see the updates to your data at the level updated.



Upload File

Module: Location Business Object: triSpace

Form: triSpace

Import Type: Add Action: triCreateDraft

File Type: Tab Delimited (*.txt)

File Char Set: UTF-8

Batch Upload: ☐

Name: Browse... SiteUtility.txt

Create Header Upload File

 Do_Not_Reply_PPSSIT.

SiteUtility.txt upload successful. 101 Imported. - SiteUtility.txt upload successful. 101 Imported.