TRIRIGA QUICKSTART GUIDE

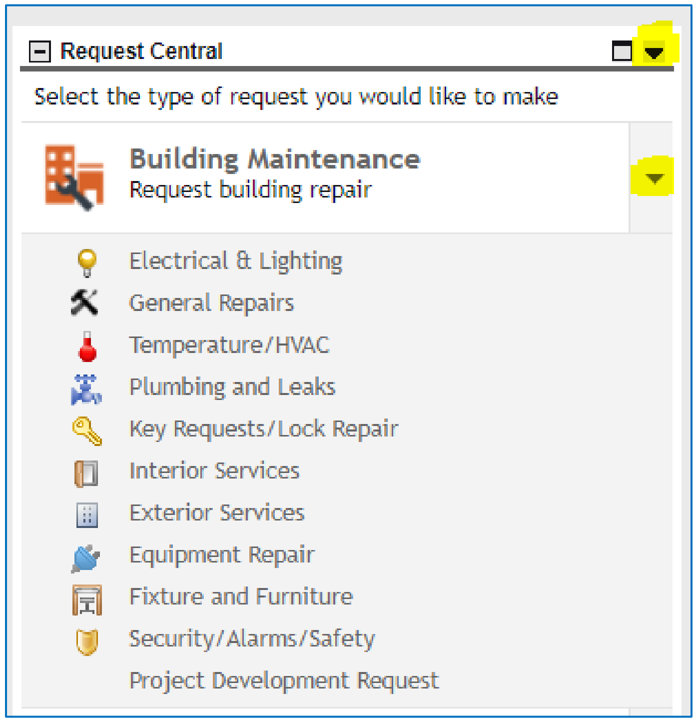
This guide is meant to help get you oriented upon signing into TRIRIGA, if you feel you need more assistance, need an account, or forgot your password, please contact tririga-admin@pps.net.

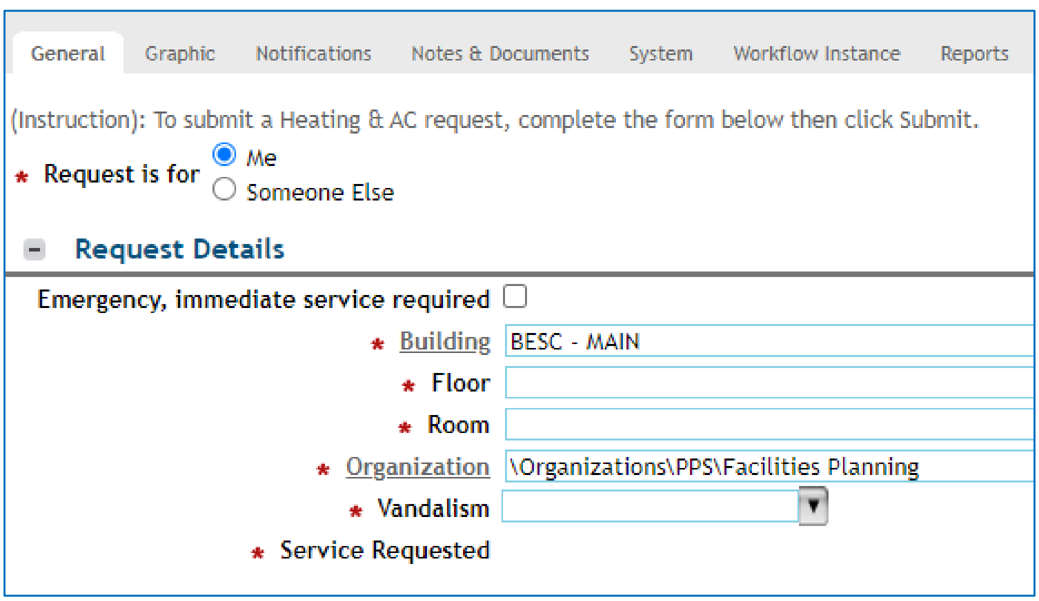
1. **Sign-in to TRIRIGA at https://pps.ecifm.net/ and bookmark the page.**
2. **Upon signing in, your home page will display your dashboard. This should contain most of the things that are useful to you.**
   a. **HELP: In the upper left hand corner there is a box with a picture of a question mark. This 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**





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)**

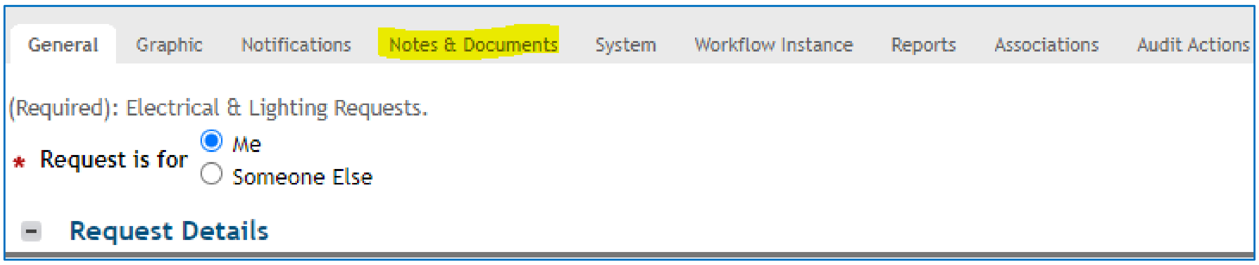
c. **Select the location where the work request is needed by using the magnifying glass 🔍 on the far right side of the location fields. You can**

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

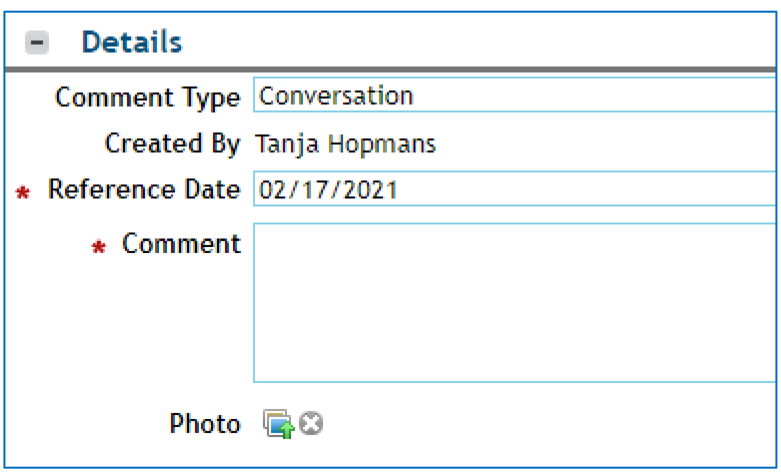
d. **Under the Service Request section, select the option that best represent your type of request**

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.**



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



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.**

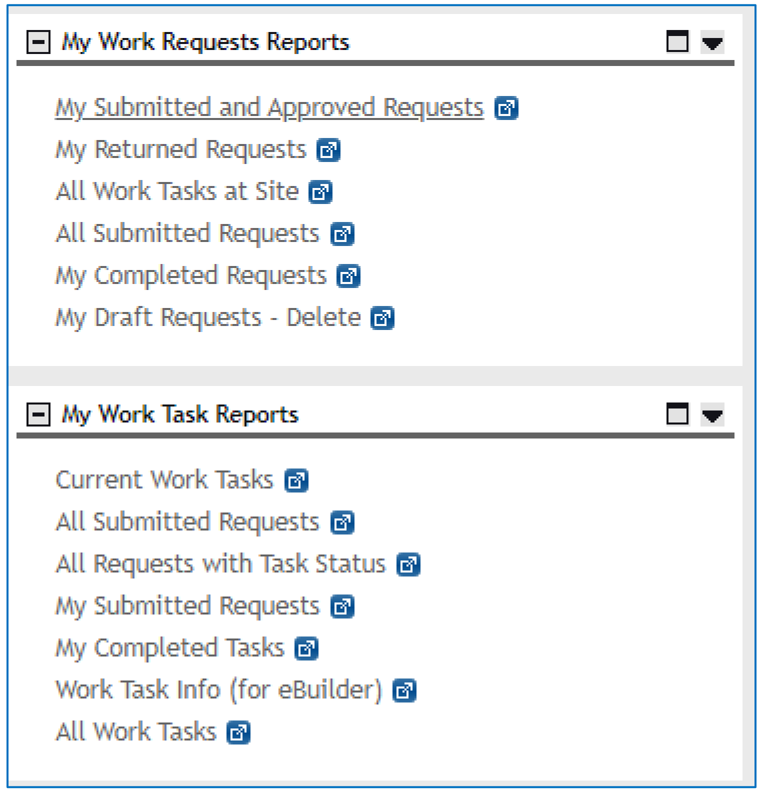
j. **After uploading the photo, go back to the General tab.**

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

4. REPORTS AND QUERIES

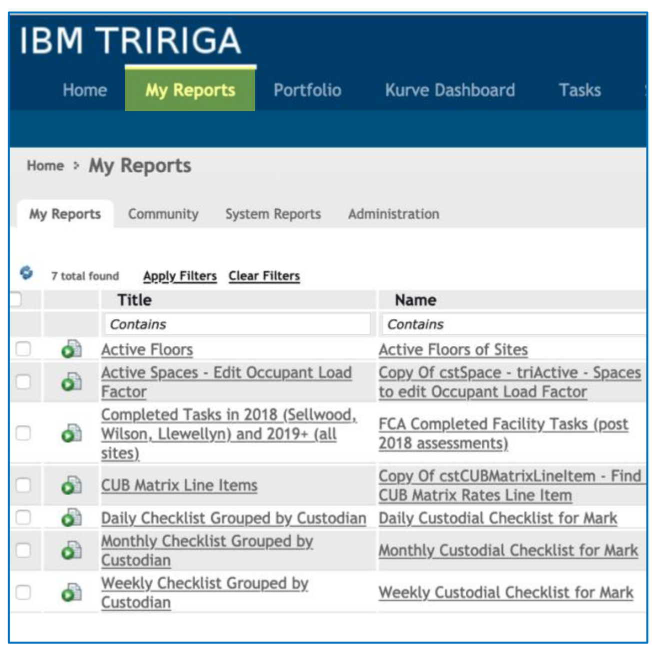
a. **To get back to you Dashboard/home screen simply select the Home Tab underneath "IBM TRIRIGA" in the top left corner of you page.**

b. **On the right side of you Dashboard, there are a series of portals. That might look like this:**

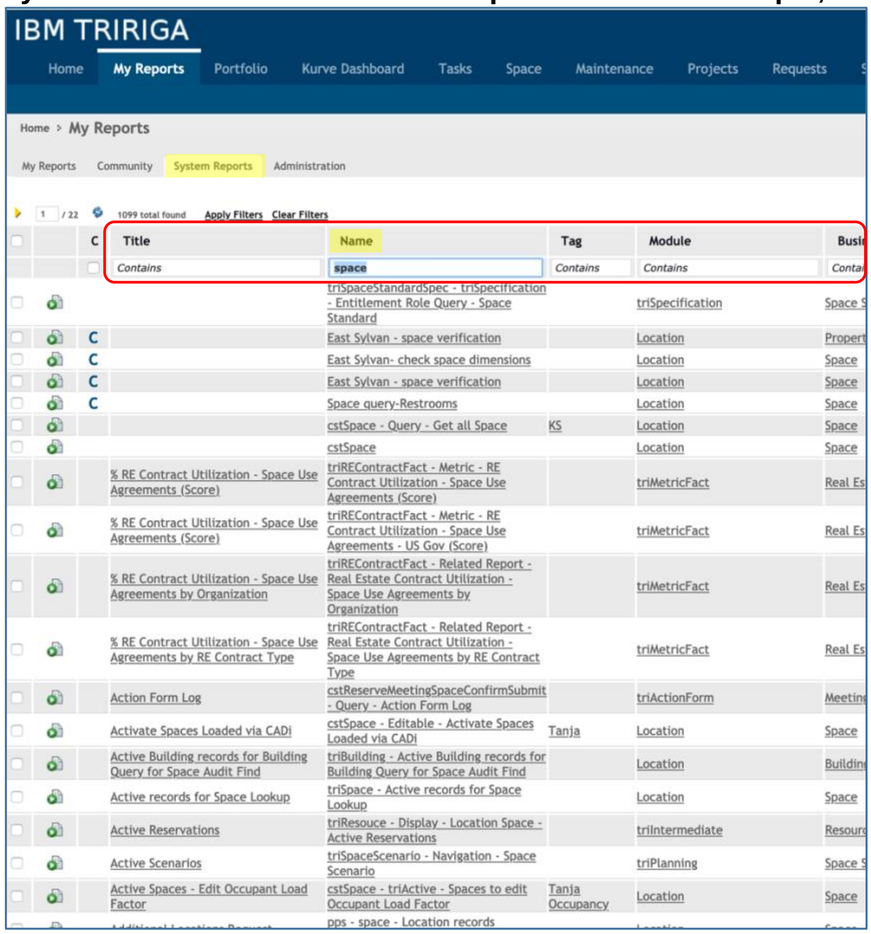


5. CREATING A REPORT FROM AN EXISTING SYSTEM REPORT

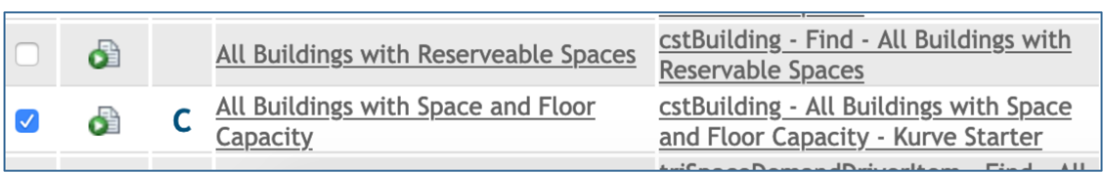
a. **To get to the reports area, in your Dashboard go to the My Reports tab and you'll see this:**

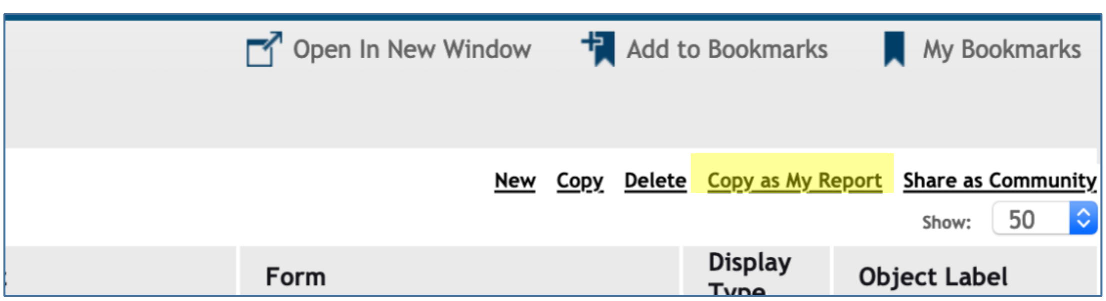


b. Click on the **System Reports** tab to find a report to copy. Either scroll down or you can use any of the search functions in the top row. For this example, we will use the **Name** column to search for "space" and hit return, which will search for the reports with the word in its name.

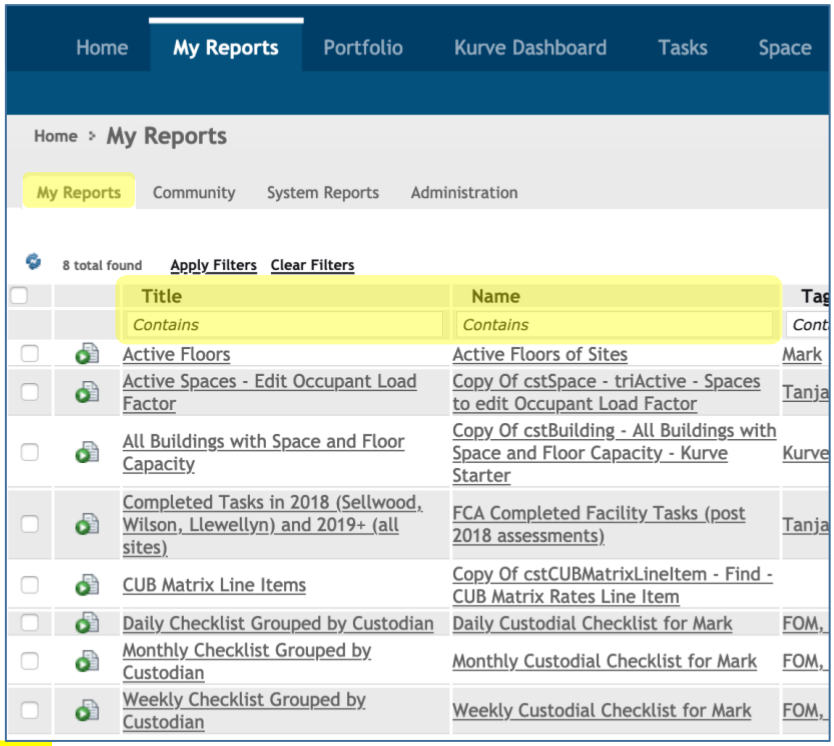


c. Check the box next to the report you wish to copy and click on **Copy as My Report** Copy as My Report in the upper right area of the Reports page.

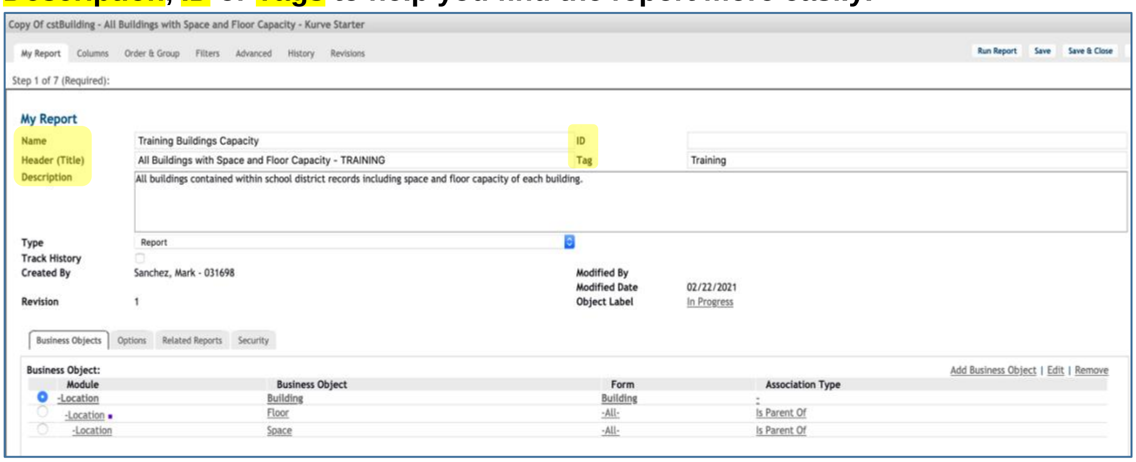




d. Now, if you go to the **My Reports** tab, this report should be in your personal set of reports. Now, if you click on the Title or Name of the report it will open the Report Editor in a separate window. This is where you can fine tune the report to fit your needs.

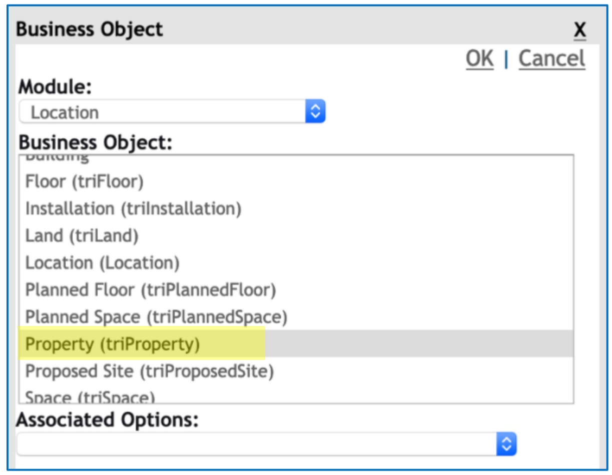


e. You can edit the **Name**, **Header**, **Description**, **ID** or **Tags** to help you find the report more easily.

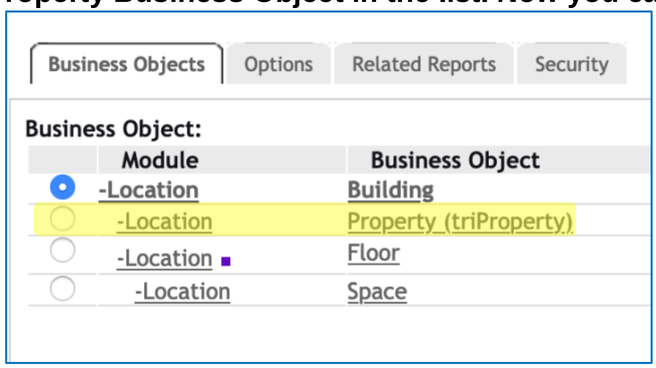


f. Down in the lower tabbed section is where you can really start to make this your own report in Tririga. You can add/remove Business Object associations to add information to the report, set options, see any related reports that might be associated with this one and set security access for the report.

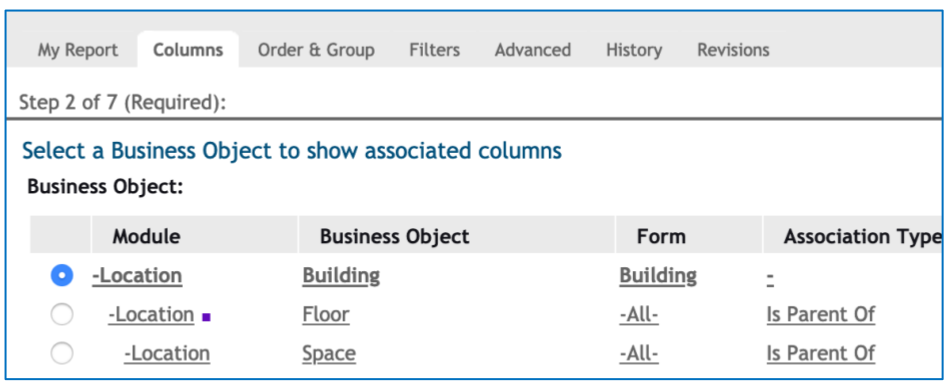
g. To add the Property module to the report, select the Add Business Object Add Business Object option to the right. Scroll down to find Property (triProperty) and click OK OK .



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.

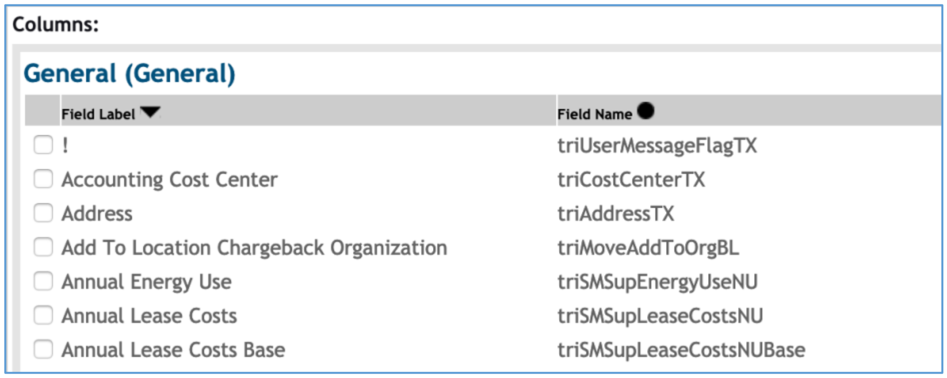


i. If we go to the upper set of tabs, the various tabs give us the power to add more information to a report, group things, add filters and find any associations to other reports.

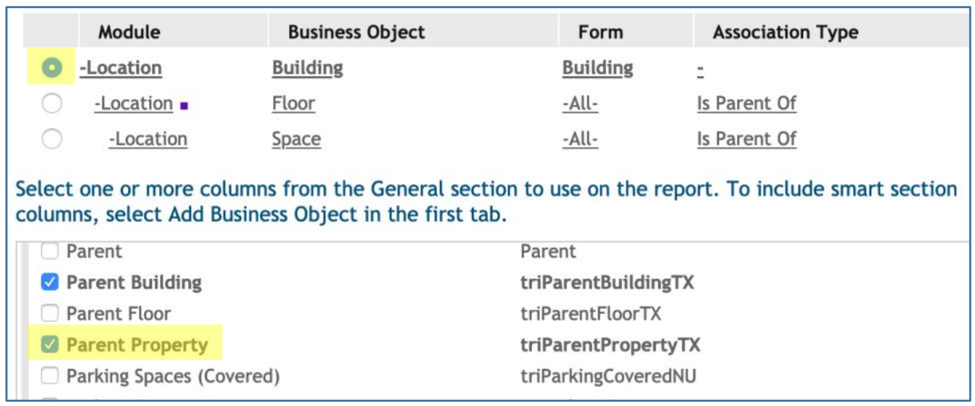


j. If a Business Object is added to a report, then we can use any of those Objects to be included as a column in the report. If we click on the Columns 

tab we should see:



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

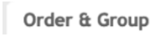


report. Check the button  next to Parent Property . Note, it will automatically add Parent Property to the Display Columns on the right side of the screen. If you click Save 

and 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.

m. If you wanted to order or group any of the data, you can do that in the Order & Group 

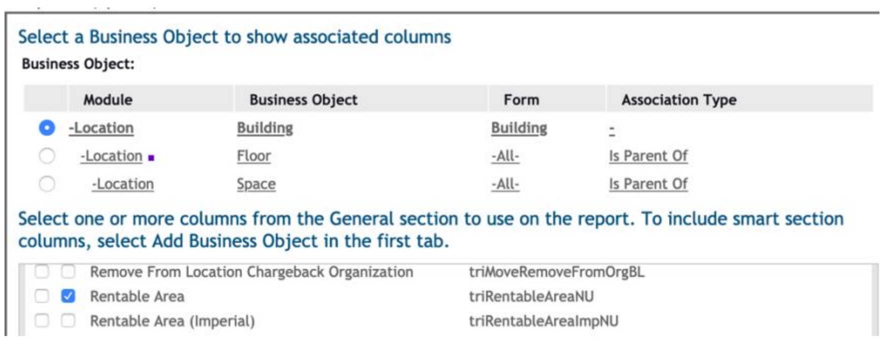
tab next to the Columns tab. Let's Group By **Building ID** and **Gross Area.** Select both of those

and click the  right arrow. Click **Save** 

and **Run Report**. 

It will now group the data according to these parameters.

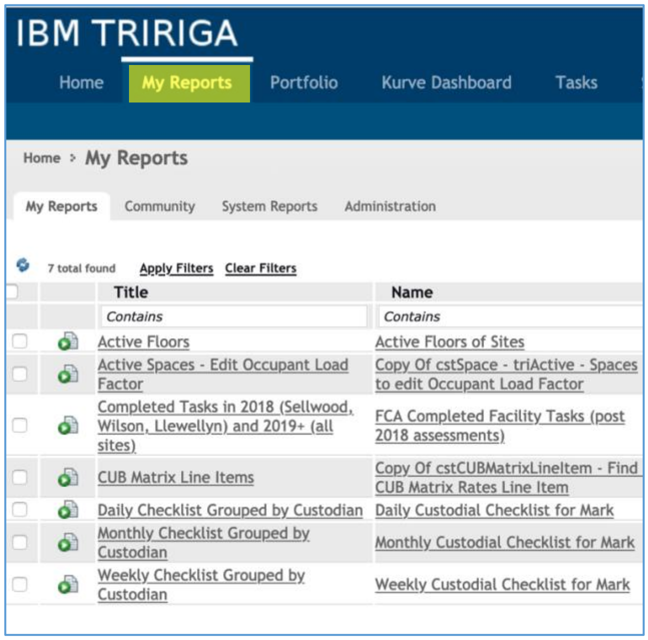
n. You can also filter the data within a report. There are User Filter Columns and System Filter Columns. Let's add a System Filter Column using



'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'.

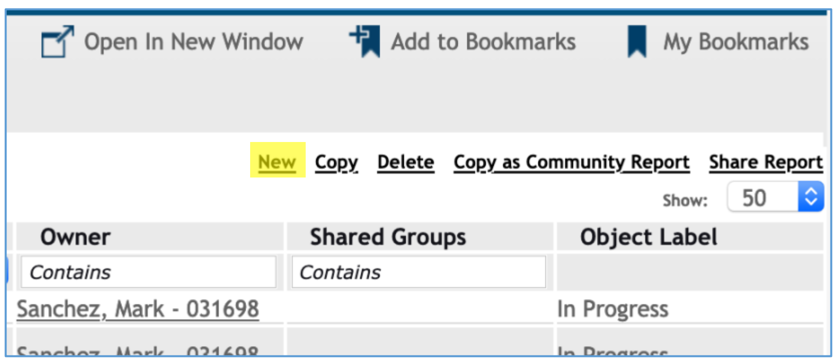
Click **Save** and **Run Report**. You should only see some selected rooms at BESC where the 'Rentable Area' is greater than 15000ft^2.

6. CREATING A REPORT FROM SCRATCH

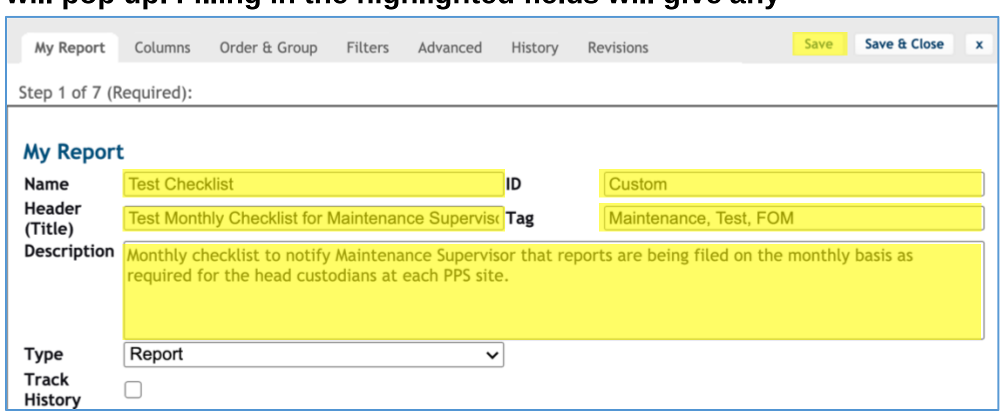


a. To get to the reports area, in your Dashboard go to the **My Reports** tab.

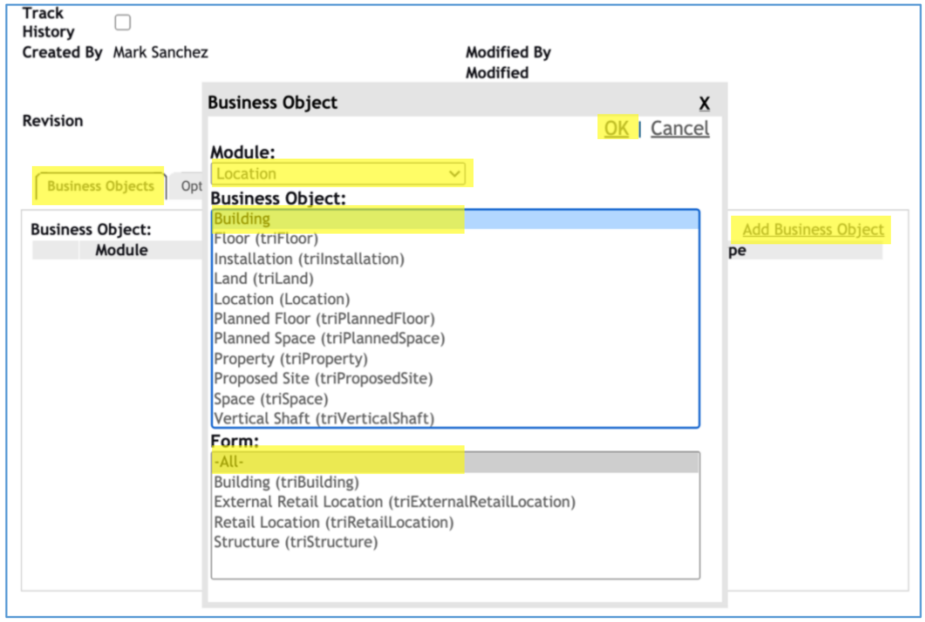
b. Go the the System Reports section. On the right side of the page, you will see your options, go ahead and select **New**.



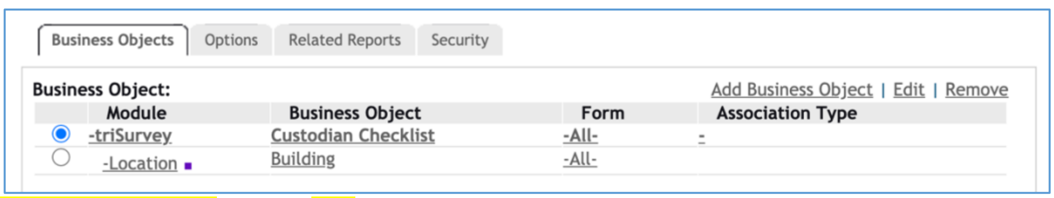
c. A new window will pop up. Filling in the highlighted fields will give any possible user the information they need to understand what is included in this report and what it is querying. Click **Save** when you're done adding information.



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**

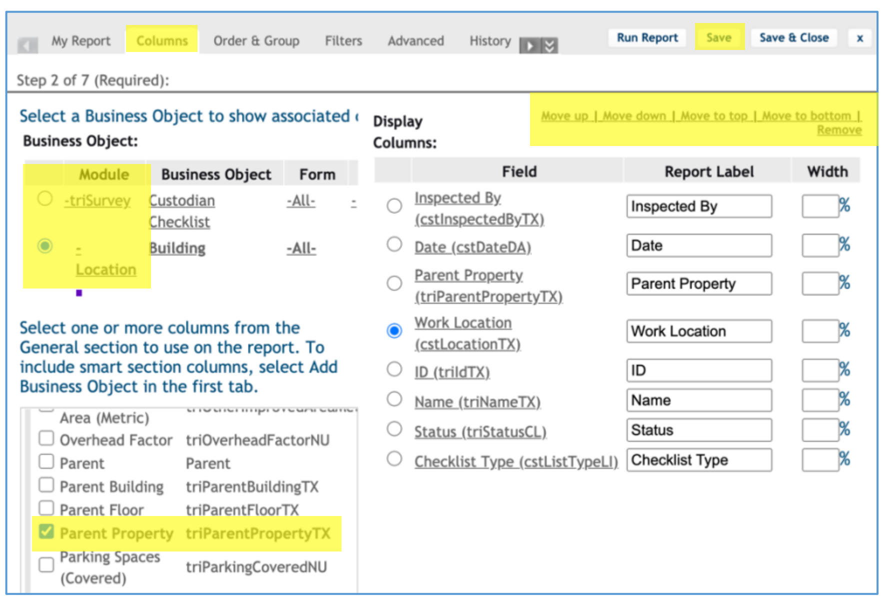


and the menu will pull up to select the Module, Business Object and Form you are seeking data. Select **Module: triSurvey** with **Business Object: Custodian Checklist (cstCustodianChecklist)** and **Form: -All-**. Click **OK** and the module will be added to your Business Objects tab. Then, we will also need to select **Module: Location** with



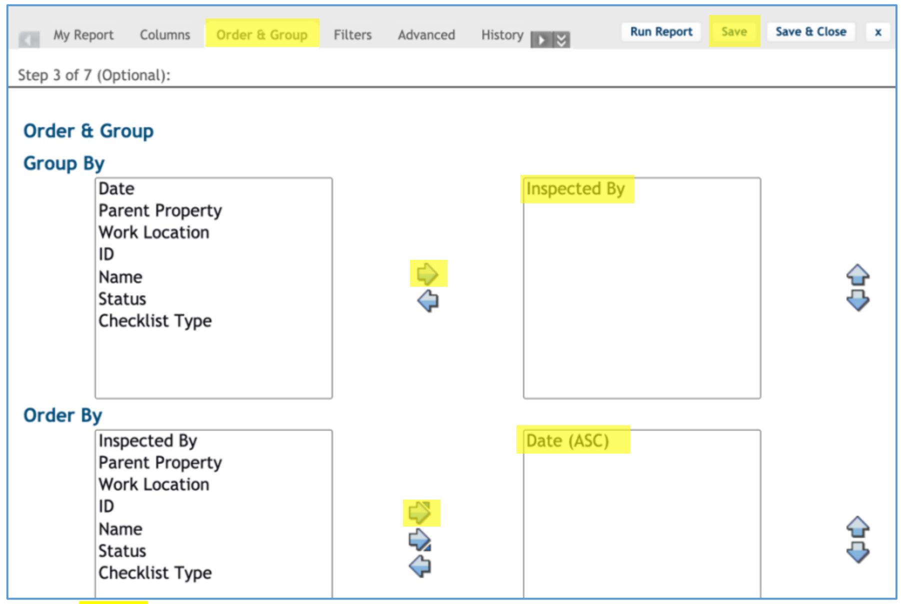
Business Object: Building. Click **OK** and both should be in your Business Objects tab.

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**

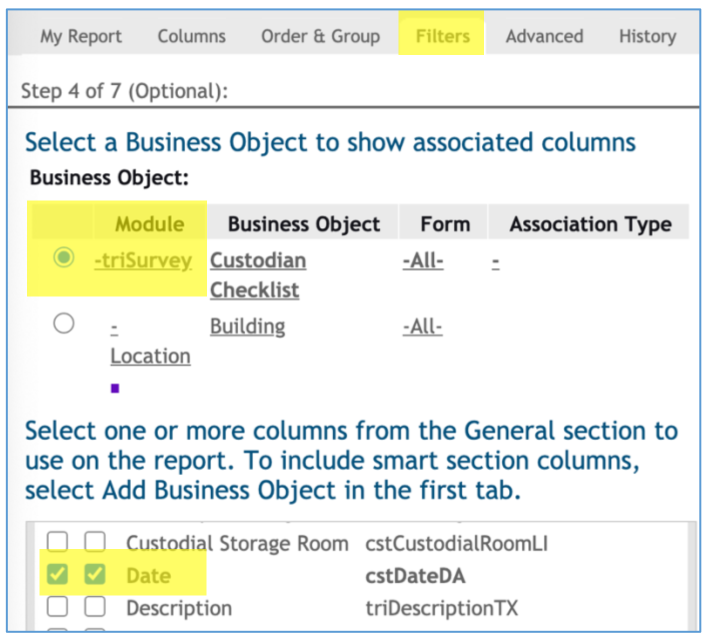


module. Rearrange them as you see fit using the selections on the right side of the window. Click the Save button and we can move on.

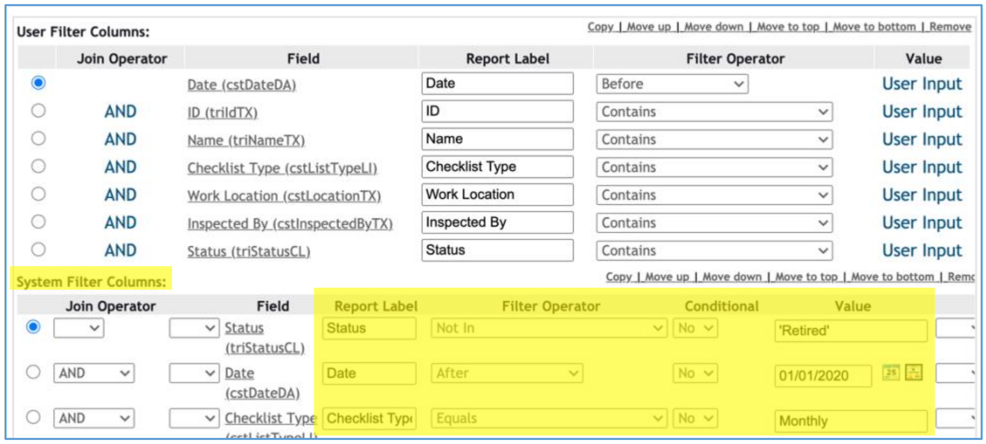
f. Now, let's move on to the Order & Group tab. In here we can order the results and group the results according to hierarchy within the query. Let's keep this relatively simple (though you can get complex). Move Inspected By in the Group By section by clicking on the field and then the right arrow.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



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.



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 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.

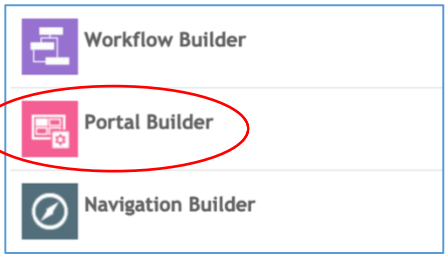


For more in-depth understanding of all the ins and outs of reporting in TRIRIGA there are videos:

[TRIRIGA Reporting Training Video 1]

[TRIRIGA Reporting Training Video 2]

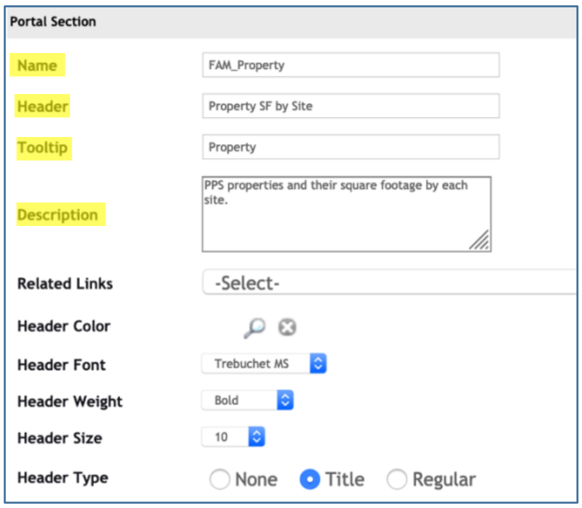
7. CREATING A NEW PORTAL SECTION



a. 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.

b. In the Portal Builder, we will add a new section by using the Add Add button in the upper left.

c. 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.

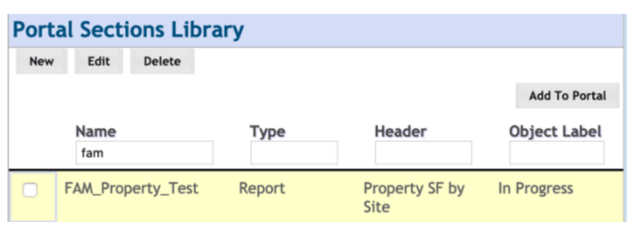


d. Fill in the sections needed such as **Name**, **Header**, **Tooltip** and **Description** so that people can understand what this section should be used for in TRIRIGA. We will also be using a query as the data for this portal section. Select the magnifying glass in the Query Query area near the bottom 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.

e. 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

f. 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.



8. <u>LOADING DATA INTO TRIRIGA</u>

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. 

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.**