

# MOVE MANAGER GUIDE

This guide is meant to help you manage your move requests in [TRIRIGA](#), if you feel you need more assistance, need an account, or forgot your password, please contact [tririga-admin@pps.net](mailto:tririga-admin@pps.net).

**MANAGING REQUESTS & TASKS:** Managing the resources and updating their planning and instruction are the main functions of this section. Assigning people, organizations, labor codes, move instructions, work task creation, notifying, planning and reporting are all the key components.

i. **COMPLETE WORK REQUESTS**

1. **MANAGING MOVE REQUESTS**
2. **APPROVE MOVE REQUESTS**
3. **SPACE CORRECTION REQUESTS**
4. **AUTOMATIC RECORD UPDATES**

ii. **RETURNING REQUESTS**

1. **RETURN MOVE REQUESTS**
2. **RETURN SPACE CORRECTION REQUESTS**
3. **CORRECTING A MOVE REQUEST**

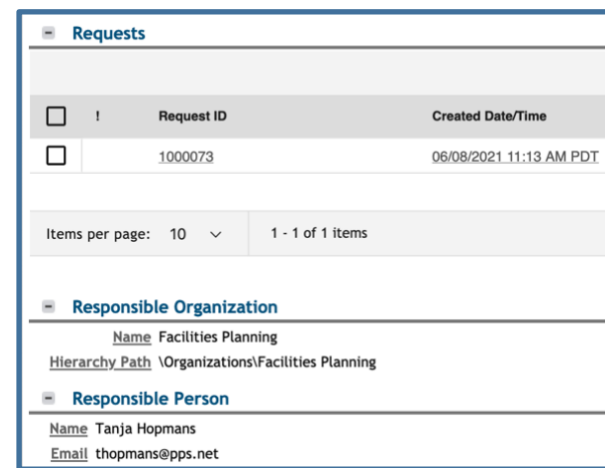
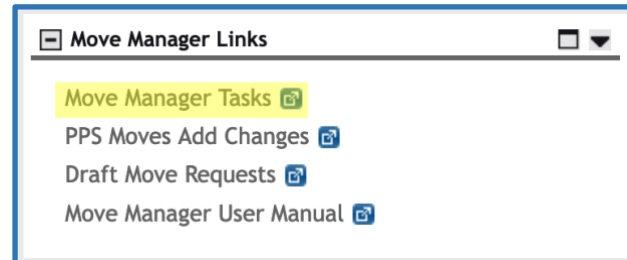
iii. **ASSIGN RESOURCES**

1. **ASSIGN LABOR ACCOUNT CODE**
2. **UPDATE MOVE INSTRUCTIONS**
3. **UPDATE MOVE PLANNER**
4. **REPORT MANAGER**

## MANAGING MOVE REQUESTS & TASKS

### WORK REQUEST CREATION REVIEW:

1. To review which move requests exist in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page.
2. If you are seeking a specific move request in the list you can select the record by clicking on a specific record. For example, let's select a specific Request ID in the far left column and a new window will pop up with this record's information. In here, you can see much more detail about a move request. If you scroll down the page, you can verify that the Requests section has an association to the move request with the Responsible Organization and Responsible Person (who is the supervisor) is populated. This allows you to validate any move request if you want to follow up on any submitted move request.



[back to top](#)


## FOR SPACE CORRECTIONS ONLY

### Employee Record (Primary Location)

1. To review which move requests exist in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page. Select and open the record.
2. Scroll down to the Requests section and select a record in this section. This will open a new window. Review the **Requested For** and **Other Locations** sections. If they need to change, click the **Revise** Revise button in the upper right section. Once you are done editing the sections, click **Submit**. Then click **Save & Close** in the Work Task Template. back to top

Facilities Project		
Requests		
<input type="checkbox"/>	Request ID	Created Date/Time
<input type="checkbox"/>	1000053	06/02/2021 01:5

Requested For	
Name	John Doe 01
Work Phone	
Email	123@xyz.com
Request Details	

Other Locations		
<input type="checkbox"/>	Image	Name
<input type="checkbox"/>		001.50

## APPROVE MOVE REQUESTS

To view the incoming move requests, use the **Action Items** link in the **Reminders – Move Planner** in the left section of your TRIRIGA home page.

### APPROVE INDIVIDUAL MOVE REQUEST

To complete individual move requests in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page. Open the Work Task record. Click the **Complete** button in the upper right corner. Click **Save & Close**.

<b>Complete</b>	<b>Hold</b>	<b>Save</b>	<b>Save &amp; Close</b>	<b>More</b>	<b>x</b>
-----------------	-------------	-------------	-------------------------	-------------	----------

Reminders - Move Planner	
Notices	
2 - Action Items	
32 - Notifications	
Requests	
1 - My Active Requests	

If there isn't enough information or you would like the date changed then you can return the request. Fill in the **Comments** section with your needs to

help you complete a request. The requestor will have an opportunity to respond to the comments and resubmit the request.

### APPROVE GROUP MOVE REQUEST

To complete group move requests in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page. Open the work request record. Click the **Complete** button in the upper right corner. Click **Save & Close**.



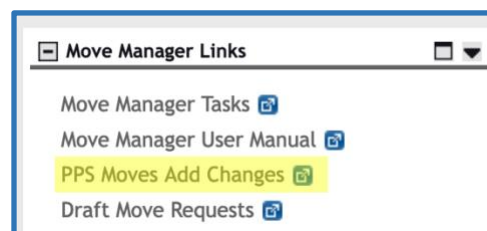
### APPROVE FURNITURE MOVE REQUEST

To complete furniture move requests in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page. Open the work request record. Click the **Complete** button in the upper right corner. Click **Save & Close**.



### APPROVE SPACE CORRECTION REQUEST

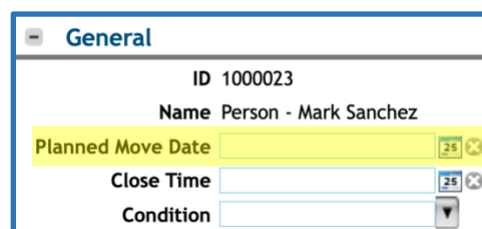
To complete space correction requests in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page. Open the work request record. Click the **Complete** button in the upper right corner. Click **Save & Close**.



Once requests have been approved they become a task. Use the **PPS Moves Adds Changes** report to manage tasks from this point.

In this report, you can open a request line item by clicking on it and do several operations. You can add move instructions, change the move date and close out a move request.

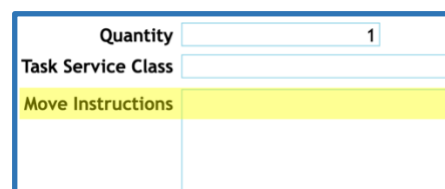
[back to top](#)



### AUTOMATIC RECORD UPDATES

#### INDIVIDUAL MOVE REQUEST

"Requested For" employee's Primary Location is updated to the "To" location from the Move Request. "From"



Space Organization Occupancy Allocation assigned to Facilities Planning.  
"To" Space Organization Occupancy Allocation assigned to Employee's Primary Organization.

### **GROUP MOVE REQUEST**

Each employee's Primary Location is updated to the "To" location from the Move Request Line Item. "From" Space Organization Occupancy Allocation assigned to Facilities Planning. "To" Space Organization Occupancy Allocation assigned to Employee's Primary Organization.

### **FURNITURE MOVE REQUEST**

Each asset record's "Primary Location" is updated to the "To" location from the Move Request Line Item.

### **SPACE CORRECTION REQUEST**

Each employee's "Primary Location" and/or "Secondary Location" was manually updated by the Work Task Resource prior to the Work Task completion. [back to top](#)

## **RETURN MOVE REQUESTS**

### **RETURN INDIVIDUAL MOVE REQUEST**

To access individual move requests in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page. Open the work request record. Open the work request record. Click **Reject**. Click **Save & Close**. This will return the request to the individual to add more information (such as a date or description) so that you can approve the request and turn it into a task.

### **RETURN GROUP MOVE REQUEST**

To access group move requests in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page (are we noticing a pattern yet?). Open the work request record. Click **Reject**. Click **Save & Close**. This will return the request to the individual to add more information (such as a date or description) so that you can approve the request and turn it into a task.

### **RETURN FURNITURE MOVE REQUEST**

To access furniture requests in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page. Open the work request record. Click **Reject**. Click **Save & Close**. This will return the request to the individual to add more information (such as a date or description) so that you can approve the request and turn it into a task.

## RETURN SPACE CORRECTION REQUEST

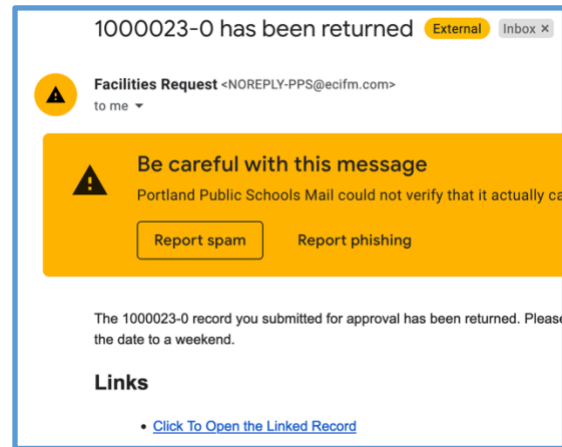
To access space correction requests in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page. Open the work request record. Click **Reject**. Click **Save & Close**. This will return the request to the individual to add more information (such as a date or description) so that you can approve the request and turn it into a task. [back to top](#)

## CORRECTING A MOVE REQUEST:

1. Select **Click Here if Highlighted for Referenced Record**

Internal Recipient Julie Roeder  
Date Sent 09/14/2021 14:42:08  
[Click Here if Highlighted for Referenced Record](#)

2. Select **More -> Return**
3. Add a Review Comment in that section and click **Continue**. The Move Request will be returned to the recipient for corrections.



Comments	
* Review Comment	Change the date on this move,

4. The requestor will receive an email alerting them that changes are needed. They can click the link to open the record in TRIRIGA. portion of the move request.

- Once in the move request in TRIRIGA, they can navigate to the **Notifications** General Notifications tab and they will see the reason for return under the **Approval Reviews** area in the **Comment** column.

Approval Reviews							
<input type="checkbox"/>	Export	1 total found					Show
<input type="checkbox"/> Approval Status	#	Person	Review Status	Sent	Completed	Comment	Resolved Review
<input type="checkbox"/> Returned	1	Julie Roeder	Returned	09/15/2021 10:20 AM PDT	09/15/2021 10:24 AM PDT	Please change the date to a weekend.	Approval Rule

- Back in the **General** General Notifications tab the fields should be available for editing. In this case, the Move Manager wants the date changed. So, change the date in the **Proposed Move Date** field and click **Submit** Submit. It will return the request to the Move Manager for approval.

* <b>Organization</b>	Facilities Planning
* <b>Proposed Move Date</b>	10/01/2021 <span>25</span>
<b>Reason For Move</b>	Department Change

- If you click on the link for the request notification either in your email or in TRIRIGA in the Notifications section it will open the detailed notification. Click the **Click Here if Highlighted for Referenced Record** and you can review if the changes made for the Move Request were sufficient.

<b>Notification Subject</b>	TRIRIGA Action Item - Required Review (1672737 - Move Request-1000023-0-1672737)
<b>Internal Recipient</b>	Julie Roeder
<b>Date Sent</b>	09/15/2021 10:41:13
<b>Click Here if Highlighted for Referenced Record</b>	Move Request-1000023-0-1672737

- If the changes are sufficient, click the **Approve** Approve button in the upper right of the record. Feel free to add any comments (if needed)for the requestor and click the **Continue** Continue button to approve the request. back to top

## ASSIGN RESOURCES

### ASSIGN LABOR ACCOUNT CODE:

- To review which move requests exist in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page. Select and open the record.
- In the **REQ Class** column enter 'move' and hit **Return**. Open the request record and populate the **Accounting** Section. Click the **clear** ✕ icon to remove the default value. Click **select** 🔍 icon to filter and select the correct **Cost Code** to assign to the Work Request. You can also use the buttons to the right of the Accounting section to add more information.

<b>Accounting</b>	
<b>Labor Account Code</b>	101-5592-25441-99999
<b>Material Account Code</b>	
<b>Service Provider Account Code</b>	
<b>Work Hours</b>	1

Add | 
 Find Assets | 
 Find People | 
 Find Locations | 
 Find Organization | 
 Quick Add Time Entry | 
 Remove

- When finished, click **Save & Close** to complete assigning the labor account code information. [back to top](#)

### **FOR GROUP AND FURNITURE MOVE ONLY**

- To review which move requests exist in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page. Open the appropriate move request record and populate information in the **Resources** tab. [Notes & Documents](#) [Resources](#) [Procedures](#)

[back to top](#)

### **Update Move Instructions (Move Request -> Move Details Tab -> Move Request Line Item)**

To review which move requests exist in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page.

Open the request record and select the **Move Details** tab. Click desired **Move Request Line Item** record from the **Move Details** section. Populate the **Resolution Description** field with desired move directions for the Move Resource (i.e. vendor). Click **Save & Close**. [back to top](#)

### **Update Move Planner (From) (Move Request > Move Details Tab > Move Request Line Item)**

- To review which move requests exist in the system, click on the **Move Manager Tasks** report in the **Move Manager Links** section on the right side of your home page. Select and open the record.

- In the **REQ Class** column enter 'furniture' and hit **Return**. Open the request record and select the **Move Details** tab. Select a record in the Move Details section which will open in a new window.

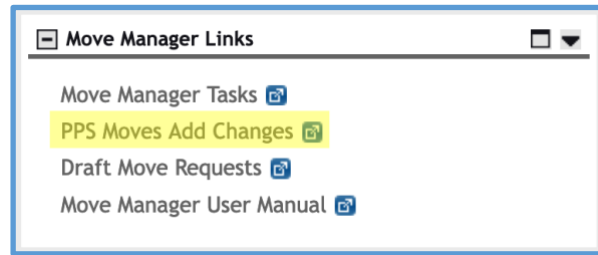
From Location	
Building	AINSWORTH - MAIN
Floor	01
Room	1D
Path	\\Locations\AINSWORTH\AINSWORTH - A
Mail Stop	
Primary Phone	
Capacity	1
Space Class	SP_FacWrk
Move Planner	Julie Roeder

- Populate the fields in the **From Location** section. Click **Save & Close** when finished and this page will close. Click **Save & Close** in the Work Task Template. [back to top](#)

### **Report Manager – “PPS Moves Add Changes”**



1. To review which move requests exist in the system, click on the **PPS Moves Add Changes** report in the **Move Manager Links** section on the right side of your home page. Select and open the record.



2. Filter the available Move record details using the search fields under the columns. Click the

**Download**  icon in the upper right of the report to download filtered details into an **Excel** file format. [back to top](#)