

IBM TRIRIGA  
Version 10 Release 5

*Getting Started  
User Guide*



**Note**

Before using this information and the product it supports, read the information in "Notices" on page 23.

This edition applies to version 10, release 5, modification 0 of IBM TRIRIGA and to all subsequent releases and modifications until otherwise indicated in new editions.

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## Chapter 1. Getting started

After a successful installation, you are ready to set up the IBM® TRIRIGA® application with portfolio data, group permissions, user preferences, and other settings. Supplementary application information is available for default user roles and common form elements.



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## Chapter 2. Getting started with IBM TRIRIGA

To start using IBM TRIRIGA, it is important to understand the product components and how to navigate through the components. It is also important to understand how data is organized, accessed, and presented, and how the IBM TRIRIGA environment can be customized for individual users.

The information that users need to get started with IBM TRIRIGA is presented in three videos that are located in the Media Library of the IBM TRIRIGA wiki:

### **IBM TRIRIGA - Components**

Includes information about components such as portals, forms, and menus, and how to use the components.

### **IBM TRIRIGA - Business objects and forms**

Includes information about how data is defined, processed, and displayed to users.

### **IBM TRIRIGA - Customizing**

Includes information about ways to personalize a user's environment such as the home page, portal layout, reports, bookmarks, notifications, passwords, and security.

### **Related information:**

 [IBM TRIRIGA wiki](#)





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## Chapter 3. Default user roles

The IBM TRIRIGA user roles are based on typical business processes. Your company can use the default user roles and portals or configure your own user roles and portals. An IBM TRIRIGA administrator specifies the home portals for each user role.

When users sign in to IBM TRIRIGA, the user's home portal appears. On a home portal, the user can review information in the portal sections that applies to the user's business role. Based on user role, security settings, and license access, the home portal might consist of one or many portal sections.

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### Application roles

The application roles configure and manage the IBM TRIRIGA applications and build custom applications.

#### Application administrator

Application administrators maintain the IBM TRIRIGA applications. Administrative items can include passwords, system jobs, thresholds, user messages, user profiles, news, notifications, lists, emission conversion factor tables, approvals, and application settings.

An Application Administrator role works with most users and typically performs the following tasks:

- Creates and manages license and security groups
- Sets up user access
- Creates and maintains most system and application-level standards that include classification and list values
- Creates reports and queries
- Can manage system performance
- Can manage configuration tasks such as changing labels, adding a field or section to a form, and creating portals

The portal for this role is based on the following details that are selected in this role's people record:

- **Home page:** Home - Application Administrator
- **Group details:** Admin Group or TRIRIGA Application Administrator
- **License details:** IBM TRIRIGA Application Platform

#### Application builder

Application builders build or customize applications that run on the IBM TRIRIGA Application Platform. An application builder can be anyone who is trained, and typically certified, on the IBM TRIRIGA Application Platform. Application builders can include IBM TRIRIGA application developers, and IBM TRIRIGA solution consultants, partners, and customers.

An Application Builder role typically creates or modifies the following items:

- Business objects, forms, and workflows that can include associations and state families
- Portals and navigation
- Security groups
- Reports and queries
- Object migration (OM) packages to move new or updated application functionality between environments

The portal for this role is based on the following details that are selected in this role's people record:

- **Home page:** Home - Application Builder
- **Group details:** Admin Group or TRIRIGA Application Builder
- **License details:** IBM TRIRIGA Application Builder

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## Enterprise roles

The enterprise roles manage the workplace management team and portfolio, and the financial performance of the company.

### Workplace executive

Workplace executives include any executive role that is responsible for managing, or has an interest in, the performance of the workplace management team and the workplace portfolio. This role can include chief-level and senior vice president-level executives.

A Workplace Executive role typically performs the following tasks:

- Monitors performance metrics and compliance
- Establishes workplace strategic goals, objectives, and performance criteria
- Receives and responds to approvals and notifications

The portal for this role is based on the following details that are selected in this role's people record:

- **Home page:** Home - Workplace Executive.
- **Group details:** TRIRIGA Workplace Executive.
- **License details:** TRIRIGA Integrated Workplace Manager or TRIRIGA Workplace Performance Management Enterprise. Non-enterprise users need the licenses for the products that they use.

### Finance executive

Finance executives include any executive role that is responsible for managing, or has an interest in, the financial performance of the company, the workplace management team, and the workplace portfolio. This role is a decision maker and information consumer in the real estate financial accounting process.

A Finance Executive role typically performs the following tasks:

- Monitors financial performance metrics and compliance
- Establishes financial workplace strategic goals, objectives, and performance criteria
- Receives and responds to approvals and notifications
- Enters lease accounting financial information into the TRIRIGA application

The portal for this role is based on the following details that are selected in this role's people record:

- **Home page:** Home - Finance Executive
- **Group details:** TRIRIGA Finance Executive
- **License details:** IBM TRIRIGA Integrated Workplace Manager or IBM TRIRIGA Workplace Performance Management Enterprise

## Business unit manager

Business unit managers represent the company organizations and are typically the customers of the workplace management team. This role is a point of contact for the organization or business unit for strategic facility planning, workplace reservation management, move management, and space management processes.

A Business Unit Manager role typically performs the following tasks:

- Coordinates the space and equipment needs for the organization
- Responds to space forecast requests
- Approves and coordinates space use and space allocations for the organization
- Coordinates moves for the organization
- Establishes services and service level agreements (SLA) with the workplace service providers
- Coordinates self-service training for the organization
- Approves some self-service request types, such as move and product requests
- Monitors occupant satisfaction
- Monitors performance against the SLA agreements
- Can make on-behalf-of reservations for meeting spaces and workspaces

The portal for this role is based on the following details that are selected in this role's people record:

- **Home page:** Home - Business Unit Manager.
- **Group details:** TRIRIGA Business Unit Manager.
- **License details:** IBM TRIRIGA Integrated Workplace Manager or IBM TRIRIGA Workplace Performance Management Enterprise. Non-enterprise users need the licenses for the products that they use.

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## Requester roles

The requester roles make service requests and reservation requests for themselves and for others.

## Request Central user

Request Central users submit self-service requests by using the Request Central portal. The requests can include facilities, telephones, spaces, human resources, contracts, stores, products and services.

A request central role typically performs the following tasks:

- Makes service requests for themselves and for others
- Inquires about the status of the requests
- Completes surveys on the quality of service for requests.

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Request Central
- **Group Details:** TRIRIGA Request Central
- **License Details:** IBM TRIRIGA Request Central

## Request central reserve user

Request Central Reserve users set up reservations for themselves or for other users.

A Request Central Reserve User role typically performs the following tasks:

- Reserves locations, equipment, and vehicles for themselves and for others
- Handles changes to reservations

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Request Central
- **Group Details:** TRIRIGA Request Central - Reserve
- **License Details:** IBM TRIRIGA Workplace Reservation Manager (server-based license)

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## Environmental sustainability roles

The environmental sustainability roles measure, manage, and reduce the environmental impact of the real estate portfolio.

### Environmental manager and environmental planner

Environmental managers and environmental planners focus on environmental sustainability. In some cases, either role can have a primary role as a Real Estate Manager, Facilities Manager, or Operations Manager.

An Environmental Manager or Environmental Planner role typically performs the following tasks:

- Measures and assesses the overall environmental footprint of the portfolio
- Manages the environmental impact by identifying and evaluating opportunities for improvement
- Implements changes to reduce costs and environmental impact
- Defines and monitors facilities-related carbon, energy, water, waste, travel, and emissions programs
- Reports on the current and planned environmental performance of facilities
- Recommends environmental improvement projects that are often initiated by other facilities departments

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Environmental Manager
- **Group Details:** TRIRIGA Environmental Manager/Planner
- **License Details:** IBM TRIRIGA Real Estate Environmental Sustainability Manager or IBM TRIRIGA Real Estate Environmental Sustainability Impact Manager  
Optional: IBM TRIRIGA Connector for Energy Star Benchmarking

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## Operations and services roles

The operations and services roles typically manage corrective, preventive, and condition-based maintenance activities, including service requests, facility assessment, procurement, inventory, and other related processes.

### Operations executive

Operations executives are responsible for the part of the workplace team that directly manages the operations and maintenance of facilities. Operations executives usually have direct access to senior management.

An Operations Executive role typically performs the following tasks:

- Works with upper management to develop strategic operations goals
- Develops strategic long-range plans to achieve objectives
- Creates and manages an organization's fiscal operating and capital budget and expenses
- Monitors operational performance of internal and external service providers
- Monitors facility condition and environmental performance and recommends or approves funding levels and spend plans
- Provides a workplace setting that is conducive to productive work
- Monitors occupant satisfaction
- Monitors construction and renovation projects
- Monitors performance metrics
- Receives and responds to approvals and notifications

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Operations Executive
- **Group Details:** TRIRIGA Operations Executive
- **License Details:** IBM TRIRIGA Workplace Operations Manager  
Optional: IBM TRIRIGA Workplace Performance Management Operations

### Facility assessment manager and facility assessment planner

Facility assessment managers and facility assessment planners provide objective and subjective analysis of the existing and projected condition of facilities, building systems, and assets within the facilities. These users determine the immediate and long-term cost liabilities for the assessed building systems, and recommend opportunities for improvement. Some facility assessment managers and planners can have a primary role as a Facilities Manager or an Operations Manager.

A Facility Assessment Manager or Facility Assessment Planner typically performs the following tasks:

- Defines and monitors facilities-related condition assessment and remediation programs
- Collects and reports on data that is related to the condition of facility building systems, locations, and key structures and assets
- Tracks and maintains information about corrective and preventative maintenance
- Initiates inspection requests to onsite team members or external service providers for facility inspections

- Reports to senior management on the current and planned performance of facilities
- Recommends facility assessment improvement projects, often initiated by other facilities departments
- Participates in approved facility assessment projects

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Facility Assessment Manager Planner
- **Group Details:** TRIRIGA Facility Assessment Manager
- **License Details:** IBM TRIRIGA Facility Assessment, IBM TRIRIGA Workplace Operations Manager  
Optional: IBM TRIRIGA Workplace Performance Management Operations

## Contact center manager

Contact Center managers manage the Contact Center agents and can also act as a Contact Center agent. The Contact Center manager can report to the facilities executive or operations executive. In some companies, the contact center manager manages both the facilities-related and technology-related agents.

A Contact Center Manager role typically performs the following tasks:

- Defines and monitors Contact Center agent performance metrics such as on-call resolution rate and call volume
- Helps with calls during periods of high volume
- Assists with calls that are escalated due to special requests, problems, or troublesome callers
- Manages the knowledge base
- Manages agent training

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Contact Center Manager
- **Group Details:** TRIRIGA Contact Center Manager or TRIRIGA Contact Center Manager - Retail
- **License Details:** IBM TRIRIGA Workplace Operations Manager  
Optional: IBM TRIRIGA Workplace Performance Management Operations

## Contact center agent

Contact Center agents work as a concierge, taking calls from company employees and consultants. The calls are related to requests for corrective services, moves, products such as furniture or computers, and reservations. Contact Center agents report to the Contact Center manager and can handle requests and reservations for multiple locations. Contact Center agents are measured by call-related metrics such as on-call resolution rate and call volume.

A Contact Center Agent role typically performs the following tasks:

- Receives and records requester-based and location-based requests
- Handles requests directly from calls, email, or fax
- Enters the call information into a request in the IBM TRIRIGA system
- Attempts to resolve the issue during the phone call to avoid the need for a request to be created

- Dispatches the request to the appropriate service provider
- Follows up with callers for some requests
- Is measured by call-related metrics such as on-call resolution rate and call volume

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Contact Center Agent
- **Group Details:** TRIRIGA Contact Center Agent or TRIRIGA Contact Center Agent - Retail
- **License Details:** IBM TRIRIGA Workplace Operations Manager  
Optional: IBM TRIRIGA Workplace Performance Management Operations

## Contract manager and purchasing manager

Contract managers and purchasing managers create and manage all proposals and contracts at the company level and for specific projects. Contract managers and purchasing managers have similar roles, and in some companies, there might be one or both roles.

A Contract Manager or Purchasing Manager role typically performs the following tasks:

- Manages contracts and purchasing specific to a company or project
- Manages performance against contract deliverables
- Receives and responds to approvals and notifications

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Contract and Purchasing Manager
- **Group Details:** TRIRIGA Contract Manager
- **License Details:** IBM TRIRIGA Workplace Operations Manager  
Optional: IBM TRIRIGA Workplace Performance Management Operations

## Inventory manager

Inventory managers manage inventory locations and items for self-service and managed inventory locations.

An Inventory Manager role typically performs the following tasks:

- Issues materials and assets to technicians
- Assures that the optimal stock is on hand
- Monitors purchase requisitions and purchase orders for restock
- Receives incoming items
- Maintains accurate stock counts

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Inventory Manager
- **Group Details:** TRIRIGA Inventory Manager
- **License Details:** IBM TRIRIGA Workplace Operations Manager  
Optional: IBM TRIRIGA Workplace Performance Management Operations

## Service manager

Service managers manage service technicians and external service providers and can also act as a service technician.

A Service Manager role typically performs the following tasks:

- Defines and manages service level agreements (SLAs) with customers
- Manages external service providers
- Assigns tasks to technicians that are based on SLAs, technician availability, and technician skills
- Reviews both day-to-day and longer term metrics and handles performance that is outside of the defined thresholds
- Responds to corrective service requests
- Defines preventive maintenance plans
- Manages condition-based assessments and remediations

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Service Manager Planner
- **Group Details:** TRIRIGA Service Manager
- **License Details:** IBM TRIRIGA Workplace Operations Manager  
Optional: IBM TRIRIGA Workplace Performance Management Operations

## Service technician

Service technicians complete the work tasks that are related to requests for corrective services, moves, products, and reservations. Service technicians can be trade specialists who handle a narrow range of task types or generalists who handle a wider range of task types.

A Service Technician role typically performs the following tasks:

- Receives IBM TRIRIGA tasks
- Completes tasks in the field
- Plans their daily tasks or work tasks that are created by the service manager
- Updates the system to record time and materials for service level agreements (SLAs)

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Service Technician
- **Group Details:** TRIRIGA Service Technician
- **License Details:** IBM TRIRIGA Workplace Operations Manager  
Optional: IBM TRIRIGA Workplace Performance Management Operations

## External service provider

External service providers perform work that is based on the contract requirements that are in contracts and blanket purchase orders or on-demand purchase orders. Some external service providers can provide services such as maintenance or electrical services. Other service providers can provide products such as specific assets or the materials that are required to complete the work.

An External Service Provider role typically performs the following tasks:



- Manages service level agreements (SLAs)
- Receives and completes work tasks and purchase orders
- Performs corrective, preventive, and condition-based maintenance
- Performs special services such as condition and environmental inspections, and recommendations for remedial action
- Assigns tasks to technicians based on SLAs, technician availability, and technician skills
- Reviews day-to-day and longer term metrics for the team and handles performance that is outside of the defined thresholds
- Creates invoices for completed work

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - External Service Provider
- **Group Details:** TRIRIGA External Service Provider
- **License Details:** IBM TRIRIGA Workplace Operations Manager  
Optional: IBM TRIRIGA Workplace Performance Management Operations

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## Facilities roles

The facilities roles manage facilities, assets, spaces, moves, and requests for reservable resources.

### Facilities executive

Facilities executives are responsible for the part of the workplace team that directly manages the facilities. Facilities executives usually have direct access to senior management.

A Facilities Executive role typically performs the following tasks:

- Interfaces with upper management to develop strategic facility goals
- Develops strategic long-range plans to achieve objectives
- Creates and manages the organization's fiscal operating and capital budget and expenses
- Monitors space allocations and provides efficient space use
- Monitors moves and organizational churn rates
- Provides a workplace setting that is conducive to productive work
- Monitors occupant satisfaction
- Monitors construction and renovation projects
- Monitors performance metrics
- Receives and responds to approvals and notifications

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Facilities Executive
- **Group Details:** TRIRIGA Facilities Manager or TRIRIGA Facilities Executive - Retail
- **License Details:** IBM TRIRIGA Facilities Manager  
Optional: IBM TRIRIGA Workplace Performance Management Facilities

## Asset manager

Asset managers are typically responsible for a defined class of assets such as IT computers and servers, office equipment, point-of-sale equipment, or furniture.

An Asset Manager role typically performs the following tasks:

- Identifies and procures products within cost and quality standards that are established by the company
- Manages the total cost of ownership and the depreciation of assets
- Manages asset lease agreements and warranties
- Ensures that purchased assets are appropriately maintained and managed
- Maintains optimal inventory to meet demand
- Acquires and disposes of assets and equipment in accordance with corporate environmental standards
- Coordinates IBM TRIRIGA data with the company financial system

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Asset Manager
- **Group Details:** TRIRIGA Asset Manager
- **License Details:** IBM TRIRIGA Facilities Manager  
Optional: IBM TRIRIGA Workplace Performance Management Facilities

## Space manager and space planner

Space managers and space planners have similar roles and in some companies might be the same person. This role typically has an architectural, interior design, or engineering background and works with floor plan graphics.

Space managers and space planners work from a single user interface that applies to both of the roles. A Facilities Manager license provides access to traditional space management functionality. A Strategic Facility Planning (SFP) license provides access to advanced planning features such as understanding core business demands, simplifying complex planning analysis, and streamlining the implementation of facilities plans.

A Space Manager or Space Planner role typically performs the following tasks:

- Optimizes space utilization
- Plans space to meet business objectives
- Manages day-to-day organizational space assignments and charge-backs
- Advises internal customers about utilization improvements and planning options
- Assigns and manages task assignments
- Reviews day-to-day and longer-term metrics for a team and handles performance that is outside of the defined thresholds

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Space Manager Planner
- **Group Details:** TRIRIGA Space Manager and TRIRIGA Space Planner
- **License Details:** IBM TRIRIGA Facilities Manager,  
Optional: IBM TRIRIGA Workplace Performance Management Facilities, IBM TRIRIGA Strategic Facility Planning (SFP)

## Move manager and move planner

Move managers and move planners have similar roles and in some companies might be the same person. These roles typically have an architectural, interior design, or computer-aided design (CAD) background, and might work closely with specialized CAD designers and interior designers.

Move managers manage people and assets that are in a space and coordinate move-related activities. Move planners submit and process self-service move requests, create move designs, and plan move projects.

A Move Manager or Move Planner role typically performs the following tasks:

- Delivers space plan rearrangements
- Plans and implements move projects, tasks, and move layout designs
- Manages small moves, office configurations, and furniture requests
- Coordinates move plans with other move managers and move planners, with space managers and space planners, and with IT and telecommunications teams
- Assigns tasks to teams as a service manager would, or fulfills tasks as a service technician would
- Generates move-related maintenance or services tasks and requests

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Move Manager Planner
- **Group Details:** TRIRIGA Move Manager and TRIRIGA Move Planner
- **License Details:** IBM TRIRIGA Facilities Manager  
Optional: IBM TRIRIGA Workplace Performance Management Facilities

## Reservation coordinator

Reservation coordinators manage a portfolio of shared resources such as reservable rooms and related services, equipment, and vehicles, and manage requests and reservations for the shared resources. Reservation coordinators can act as a concierge for an event center or a manager of private rooms.

A Reservation Coordinator role typically performs the following tasks:

- Coordinates all aspects of reservations and service providers for their portfolio, including the setup of room attributes, food service providers, and equipment
- Manages the food service contracts that are associated with the rooms
- Oversees the execution of service providers to ensure successful meetings. For example, ensuring that food service and equipment orders are delivered, rooms are set up correctly, and reservation-related costs are charged appropriately
- Analyzes utilization metrics and recommends renovations to provide the optimal distribution of meeting and office space, and equipment
- Receives calls or email for reservation requests
- Enters the call or email information into a reservation on behalf of the requester
- Controls designated private rooms
- Creates, changes, and cancels room reservations, food service orders, equipment reservations, and vehicle reservations

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Reservation Coordinator
- **Group Details:** TRIRIGA Request Central - Reserve and TRIRIGA Reservation Coordinator
- **License Details:** IBM TRIRIGA Facilities Manager and IBM TRIRIGA Workplace Reservation Manager

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## Real estate roles

The real estate roles typically handle all phases of real estate transactions, contracts, lease abstracts, real estate and equipment leases, and owned property agreements.

### Real estate executive

Real estate executives are responsible for the part of the workplace team that directly manages real estate transactions and contracts. The primary responsibility of this role is to find, obtain, manage, and dispose of real estate facilities to optimize the portfolio for the company's primary business needs and objectives. The real estate executive usually has direct access to senior management.

A Real Estate Executive role typically performs the following tasks:

- Works with upper management to develop strategic facility goals
- Develops strategic long-range plans to achieve objectives
- Creates and manages the organization's fiscal operations, and capital budget and expenses
- Manages facility acquisition and disposal
- Manages real estate contracts including leases and owned property agreements
- Ensures that proper payments are made, options are executed, and renewals are evaluated
- Reviews critical dates, evaluates contract options, and determines strategic direction
- Monitors space assignments and real estate costs that are associated to internal organizations
- Facilitates compliance with regulatory reporting
- Monitors space allocations and provides efficient space use
- Provides a workplace setting that is conducive to productive work
- Monitors occupant satisfaction
- Monitors performance metrics
- Receives and responds to approvals and notifications

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - RE Executive
- **Group Details:** TRIRIGA RE Executive or TRIRIGA RE Executive - Retail
- **License Details:** IBM TRIRIGA Real Estate Manager  
Optional: IBM TRIRIGA Workplace Performance Management Real Estate

### Real estate transaction manager

Real estate transaction managers are responsible for all real estate deals or transactions, and they manage transaction plans and real estate projects. This role

manages the cost, time, and performance of service providers, and locates, acquires, and disposes of critical company locations for both owned and leased property.

A Real Estate Transaction Manager role typically performs the following tasks:

- Works with upper management to develop strategic facility goals
- Develops strategic long-range plans to achieve objectives
- Creates and manages transaction plans and real estate projects
- Manages facility acquisition and disposal
- Initiates real estate lease and owned property agreements and deal terms
- Manages external service providers such as consultants, brokers, bankers, and facility owners
- Reviews critical dates, evaluates contract options, and determines strategic direction
- Provides a workplace setting that is conducive to productive work
- Monitors performance metrics
- Receives and responds to approvals and notifications

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - RE Transaction Manager
- **Group Details:** TRIRIGA RE Transaction Manager
- **License Details:** IBM TRIRIGA Real Estate Manager  
Optional: IBM TRIRIGA Workplace Performance Management Real Estate

## Real estate project team member

Real estate project team members are typically responsible for some portion of the transaction project to acquire or dispose of owned or leased property. Team members can include brokers, appraisers, consultants, lease abstractors, vendors, internal real estate specialists, contract managers, and purchasing agents.

A Real Estate Project Team Member typically performs the following tasks:

- Provides a targeted service that is related to the overall success of the real estate project. For example, defining requirements, finding suitable locations, and evaluating and approving proposals for leases or owned property fee agreements.
- Depending on the specific service that is being provided to the project, the tasks and involvement level can differ, but most team members share common data and process needs:
  - Access to general information and other team members
  - Access to the project schedule
  - Access to assigned tasks
  - Access to project-specific information that is controlled by the team member security group

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - RE Project Team Member
- **Group Details:** TRIRIGA RE Project Team Member

- **License Details:** IBM TRIRIGA Real Estate Manager  
Optional: IBM TRIRIGA Workplace Performance Management Real Estate

## Real estate abstractor manager

Real estate abstractor managers manage the real estate abstractors and can also act as a real estate abstractor. The real estate abstractor can be a service provider.

A Real Estate Abstractor Manager role typically performs the following tasks:

- Monitors the work-in-progress lease abstracts that are created by real estate abstractors
- Manages the real estate abstractor training
- Assists with the interpretation of lease language, verification of building data, abstraction of leases, and translation of that information into the IBM TRIRIGA application
- Assists with the checking of existing contract abstracts for accuracy against the actual lease document

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - RE Abstractor
- **Group Details:** TRIRIGA RE Abstractor Manager
- **License Details:** IBM TRIRIGA Real Estate Manager  
Optional: IBM TRIRIGA Workplace Performance Management Real Estate

## Real estate abstractor

Real estate abstractors create real estate lease abstracts for the company.

A Real Estate Abstractor role typically performs the following tasks:

- Interprets lease language, verifies building data, abstracts leases, and enters that information into the IBM TRIRIGA application
- Checks existing contract abstracts for accuracy against the actual lease document

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - RE Abstractor
- **Group Details:** TRIRIGA RE Abstractor
- **License Details:** IBM TRIRIGA Real Estate Manager

## Real estate contract manager

Real estate contract managers manage real estate contracts including leases and owned property agreements for the company. This role ensures that payments are made, options are executed, and renewals are evaluated.

A Real Estate Contract Manager role typically performs the following tasks:

- Interprets lease language, verifies building data, abstracts leases, and enters that information into the IBM TRIRIGA application
- Reviews critical dates and determines financial information for each building that includes rents due, CAM adjustments, index adjustments, percentage rent schedules, and any other payments that are associated with real estate contracts
- Allocates space assignments and costs that are associated to real estate contracts to internal organizations

- Checks existing contract abstracts for accuracy against the actual lease document
- Receives and responds to requests for information about the contracts and clarification of clauses
- Insures compliance with contract clauses
- Evaluates contract options, makes recommendations to execute or dismiss options, and enters the final decision into the IBM TRIRIGA application
- Facilitates legal notices and correspondence that is related to lease administration

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - RE Contract Manager
- **Group Details:** TRIRIGA RE Contract Manager
- **License Details:** IBM TRIRIGA Real Estate Manager  
Optional: IBM TRIRIGA Workplace Performance Management Real Estate

## Lease accounting manager

Lease accounting managers manage the accounting data on real estate leases and asset leases for the company. This role ensures that proper assumptions are made, options are planned, and renewals are evaluated.

A Lease Accounting Manager role typically performs the following tasks:

- Reviews and updates accounting assumptions on lease contracts
- Insures compliance with lease accounting standards

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Lease Accounting Manager
- **Group Details:** TRIRIGA Lease Accountant
- **License Details:** IBM TRIRIGA Real Estate Manager  
Optional: IBM TRIRIGA Workplace Performance Management Real Estate

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## Project roles

The project roles typically manage all phases of programs and projects, including capital projects. Management includes project goals, plans, objectives, funding, and performance.

## Projects executive

Project executives are responsible for the part of the workplace team that directly manages short-term and long-term projects.

A Projects Executive role typically performs the following tasks:

- Works with upper management to develop strategic program and project goals
- Develops strategic long-range plans to achieve objectives
- Creates and manages the organization's fiscal operating and capital budget and expenses
- Monitors program and project performance of both internal and external service providers
- Recommends or approves funding levels and spending plans

- Monitors occupant satisfaction
- Monitors projects such as construction, renovation, and environmental projects
- Monitors performance metrics
- Receives and responds to approvals and notifications

The portal for this role is based on the following details that are selected in this role's people record

- **Home Page:** Home - Projects Executive
- **Group Details:** TRIRIGA Project Executive or TRIRIGA Project Executive - Retail
- **License Details:** IBM TRIRIGA Capital Projects Manager  
Optional: IBM TRIRIGA Workplace Performance Management Projects

## Program manager

Program managers often manage or report to the project management office and can directly manage one or more project managers. This role often has a direct line of communication to the facilities executive, real estate executive, and chief-level executives. This role is responsible for managing significant funding and must decide on the best use of that funding to accomplish the program objectives.

A program is a group of related projects that are managed in a coordinated way to obtain benefits and control that are not available from managing them individually. Funding and support can be assigned based on risk or reward categories, specific lines of business, or general types of projects, such as environmental, infrastructure, facilities, or real estate transaction plans.

A Program Manager role typically performs the following tasks:

- Estimates and submits funding requests for new programs or changes to existing program funding
- Establishes funding sources and allocates funds
- Evaluates and approves project funding requests
- Manages program cost and schedule performance against established program objectives
- Monitors project cost and schedule performance and adjusts or terminates project funding to achieve the program objectives
- Reports to senior management on program performance

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Program Manager
- **Group Details:** TRIRIGA Program Manager
- **License Details:** IBM TRIRIGA Capital Projects Manager  
Optional: IBM TRIRIGA Workplace Performance Management Projects

## Project manager

Project managers are typically responsible for new construction and major renovation projects, facility assessment, component renewal, and environmental or other projects. The projects require the coordination of budgets, schedules, and several team members.

A Project Manager role typically performs the following tasks:

- Estimates and submits funding requests for new projects



- Establishes and manages the project budget and schedule
- Coordinates all project activities including design and construction, inspections, and permits
- Manages all project-related proposals, contracts, purchase orders, change orders, invoices, and payments
- Manages the closeout activities at project completion to ensure that all aspects of the project have been successfully resolved
- Reports to senior management on project performance

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Project Manager
- **Group Details:** TRIRIGA Project Manager or TRIRIGA Project Manager - Retail
- **License Details:** IBM TRIRIGA Capital Projects Manager  
Optional: IBM TRIRIGA Workplace Performance Management Projects

## Project team member

Capital project team members are typically responsible for some portion of new construction and major renovation projects. This role is also responsible for facility assessment, component renewal, and environmental or other projects. Team members can include architects, engineers, consultants, contractors, subcontractors, vendors, operations managers, maintenance technicians, contract managers, purchasing agents, and other roles.

A Capital Project Team Member role typically performs the following tasks:

- Provides a targeted service that relates to the overall success of the project such as design, consulting, construction, materials, or inspections
- Depending on the service that is provided to the capital project, the tasks and involvement level can differ, but most team members share common data and process needs:
  - Access to general project information and other team members
  - Access to the project schedule
  - Access to assigned tasks
  - Access to project-specific information that is controlled by the team member security group

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** Home - Capital Project Team Member
- **Group Details:** TRIRIGA Project Team Member
- **License Details:** IBM TRIRIGA Capital Projects Manager  
Optional: IBM TRIRIGA Workplace Performance Management Projects

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## CAD roles

CAD users manage the integration of CAD drawing information with the IBM TRIRIGA environment.

### IBM TRIRIGA CAD user

IBM TRIRIGA CAD users are CAD designers who use a bidirectional interface between IBM TRIRIGA and either the Autodesk AutoCAD application or the

Bentley MicroStation application. This role loads CAD drawing information into the IBM TRIRIGA environment and uses the IBM TRIRIGA information for reporting in CAD applications.

An IBM TRIRIGA CAD User role typically performs the following tasks:

- Creates and edits CAD drawings
- Attaches drawings, drawing objects, and boundaries to IBM TRIRIGA records
- Publishes CAD drawing information to the IBM TRIRIGA environment
- Creates CAD reports by using the CAD drawing information that is in IBM TRIRIGA records
- Edits IBM TRIRIGA records from CAD drawing objects
- Synchronizes changes between CAD drawings and IBM TRIRIGA records

The portal for this role is based on the following details that are selected in this role's people record:

- **Home Page:** N/A
- **Group Details:** TRIRIGA CAD User
- **License Details:** IBM TRIRIGA CAD Integrator/Publisher

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