UCDAVIS
FACILITIES MANAGEMENT

AggieFacilities (TRIRIGA) Training

Module: Technician

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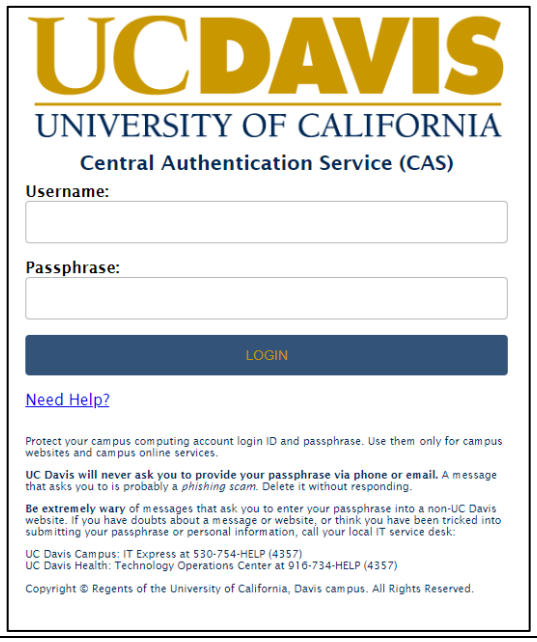
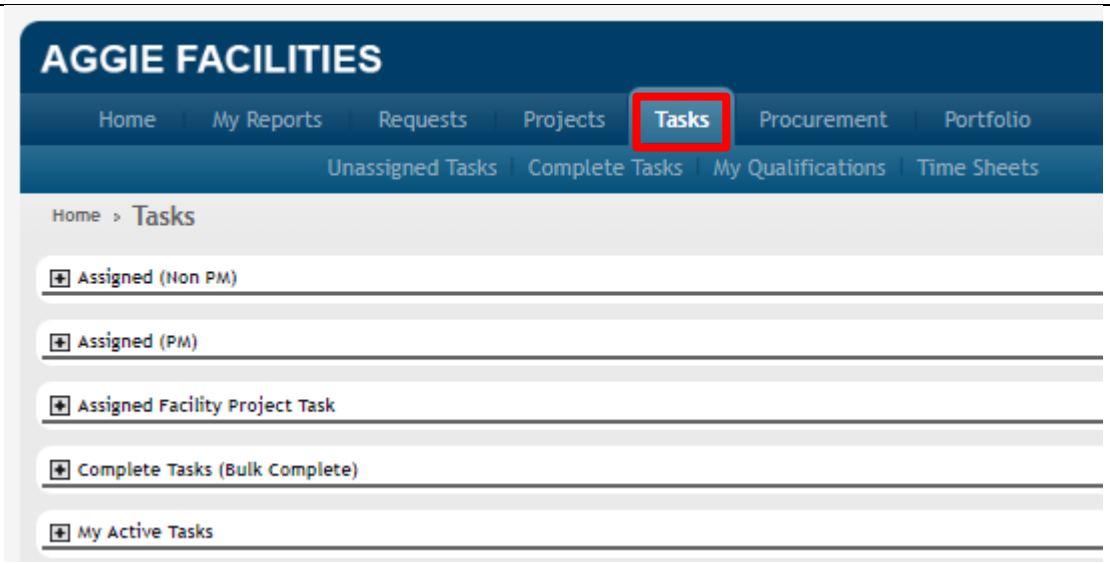
TRIRIGA Access

Access the system at: aggiefacilities.ucdavis.edu

***Login using your** Kerberos ID and password

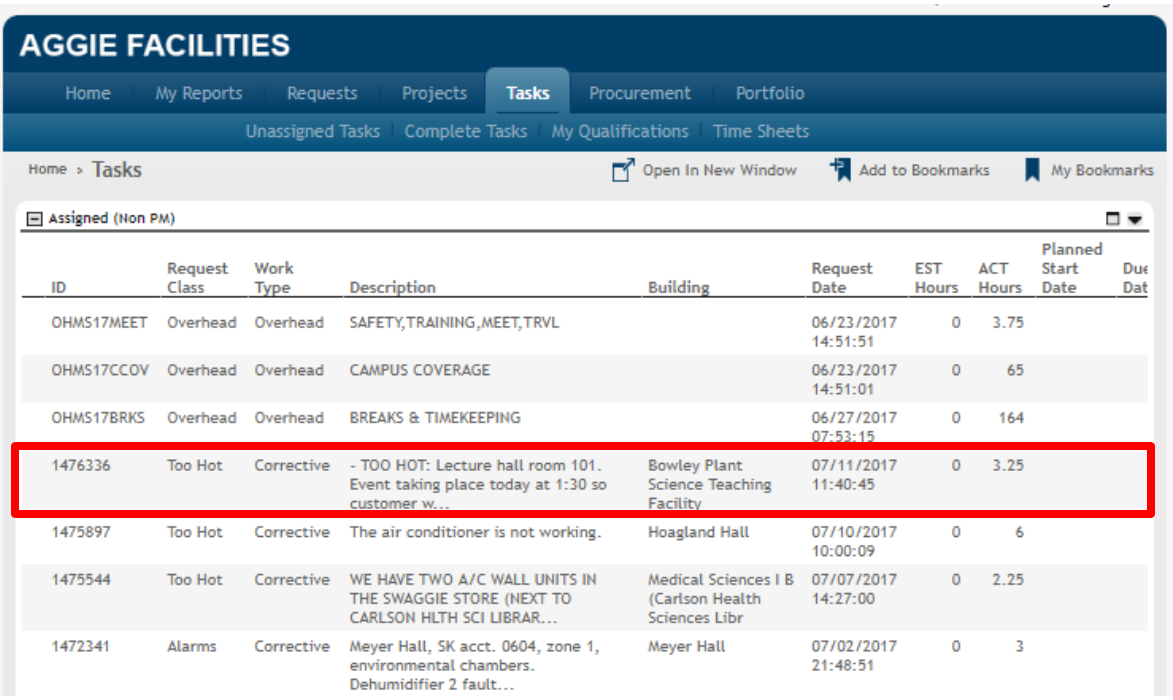
Viewing Assigned Tasks This section provides instructions on viewing tasks that have been assigned to you by your supervisor/foreman. However, you can view all tasks in the system regardless of who has been assigned to them.	
Step 1	Sign into TRIRIGA as a **Technician** using the appropriate login credentials. 
Step 2	Select **Tasks**, which allows you to view various portals:



Assigned (Non PM): This section displays all of the assigned **Non PM** work tasks where you have been selected as a resource by your supervisor/foreman.
Assigned (PM): This section displays all of the assigned **PM** work tasks where you have been selected as a resource by your supervisor/foreman.
Assigned Facility Project Task: This section displays all assigned **Facility Project Work Tasks** where you have been selected as a resource by your supervisor/foreman.
Complete Tasks (Bulk Complete): This section displays all of your active tasks and allows you to Bulk Complete multiple tasks at one time.
My Active Tasks: This section displays all work tasks where you have been assigned as a resource.

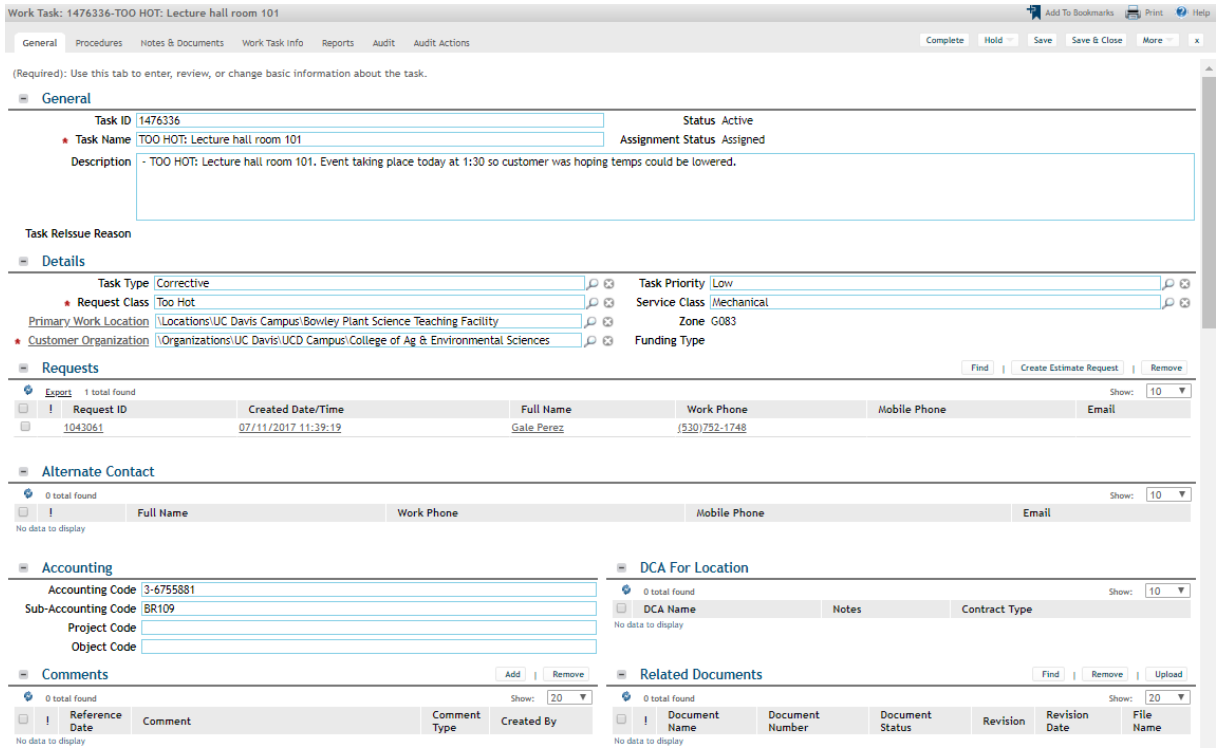
Step 3

Select the **Active Task** on which you plan to work



ID	Request Class	Work Type	Description	Building	Request Date	EST Hours	ACT Hours	Planned Start Date	Due Dat
OHMS17MEET	Overhead	Overhead	SAFETY,TRAINING,MEET,TRVL		06/23/2017 14:51:51	0	3.75		
OHMS17CCOV	Overhead	Overhead	CAMPUS COVERAGE		06/23/2017 14:51:01	0	65		
OHMS17BRKS	Overhead	Overhead	BREAKS & TIMEKEEPING		06/27/2017 07:53:15	0	164		
1476336	Too Hot	Corrective	- TOO HOT: Lecture hall room 101. Event taking place today at 1:30 so customer w...	Bowley Plant Science Teaching Facility	07/11/2017 11:40:45	0	3.25		
1475897	Too Hot	Corrective	The air conditioner is not working.	Hoagland Hall	07/10/2017 10:00:09	0	6		
1475544	Too Hot	Corrective	WE HAVE TWO A/C WALL UNITS IN THE SWAGGIE STORE (NEXT TO CARLSON HLTH SCI LIBRAR...	Medical Sciences I B (Carlson Health Sciences Libr	07/07/2017 14:27:00	0	2.25		
1472341	Alarms	Corrective	Meyer Hall, SK acct. 0604, zone 1, environmental chambers. Dehumidifier 2 fault...	Meyer Hall	07/02/2017 21:48:51	0	3		

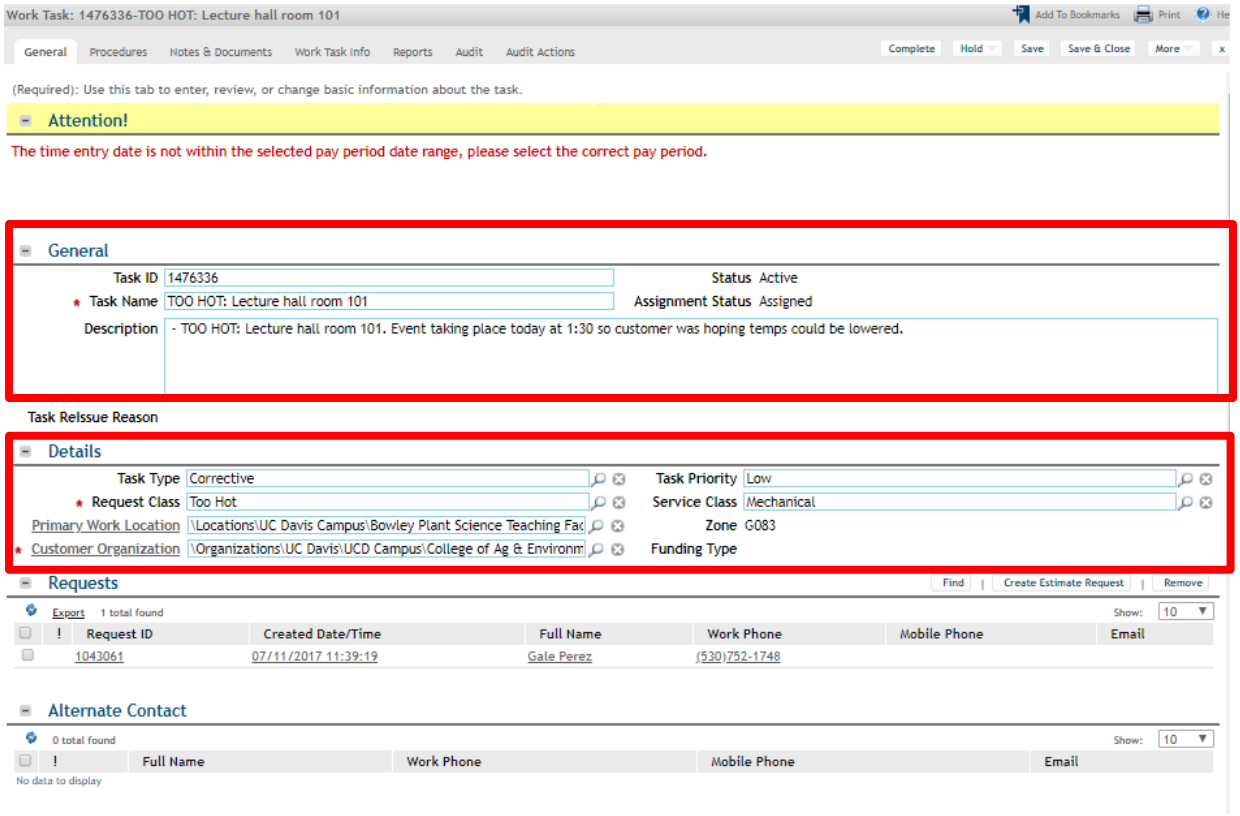
Step 4	A pop-up window will appear listing all current details on this **Work Task**.



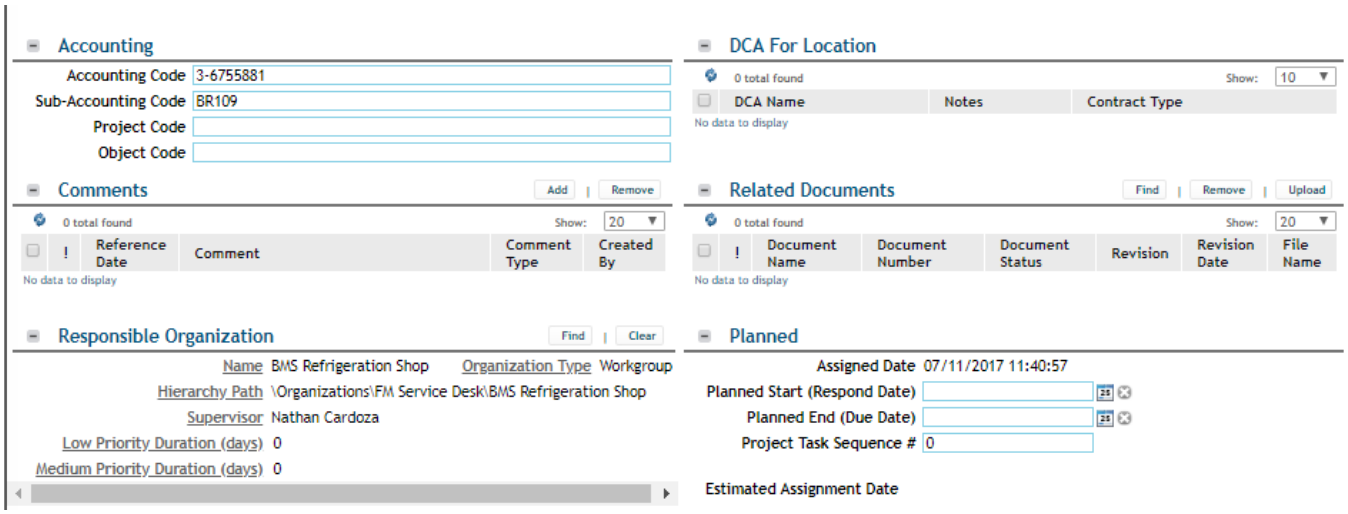
Elements of the Work Task

This section provides an overview of the relevant sections of a **Work Task**.

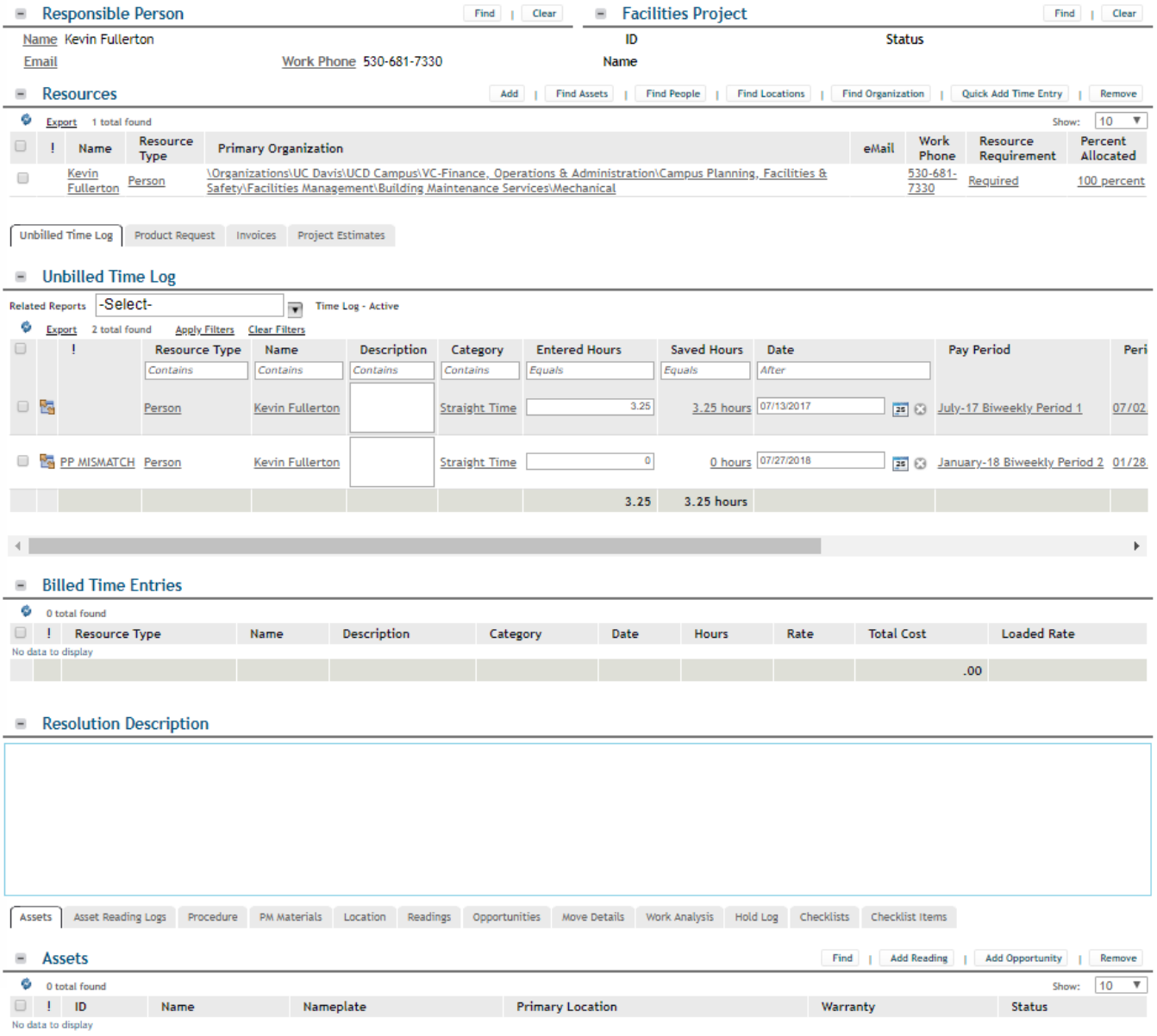
Important elements of the **Work Task** include:



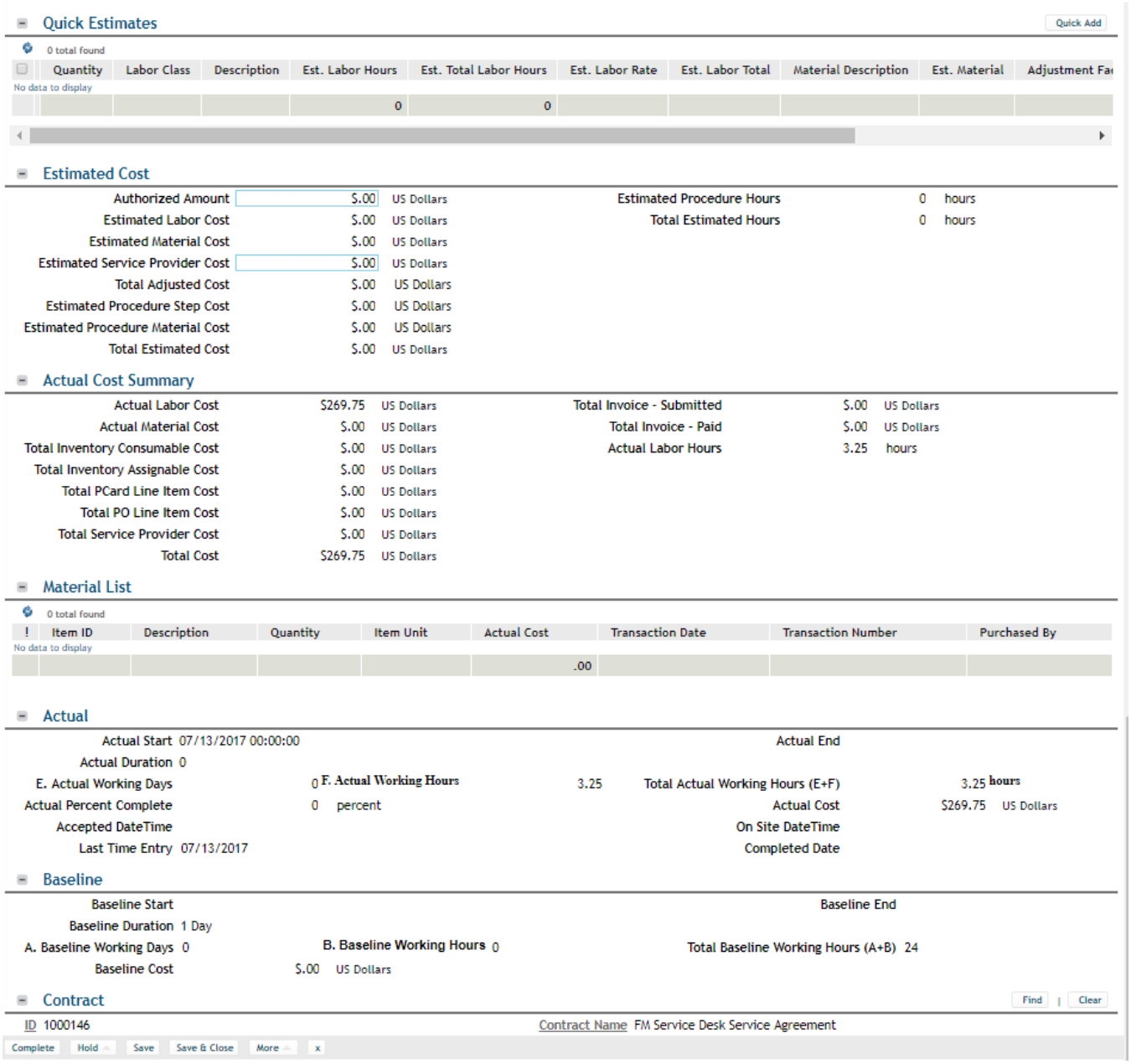
1. General
    a. **Task ID**: Auto Generated unique number assigned to a work task
    b. **Task Name**: Gives a brief description of the issue
    c. **Description**: Long description of the issue either submitted via the web portal by customer or filled out by Customer Experience when creating a task
2. Details
    a. **Task Type**: Type of work the task is for
    b. **Request Class**: Type of request (ex: too hot, too cold, etc.)
    c. **Task Priority**: Priority of the task (high, medium, low)
    d. **Primary Work Location**: Location of the work being performed
    e. **Customer Organization**: Department of the requestor. This field needs to contain the highest level organization or the task will not properly feed to Dynamics SL for billing
    f. **Zone**: Auto Generated based on the Primary Building of the task
    g. **Funding Type**: Auto Generated based on the accounting information that is input.
3. **Requests**: Reference to the initial request created by either customer or CSC
4. **Alternate Contact**: Alternate customer contact information



5. **Accounting**
    a. Codes: Account the work will be billed to. Customer Experience initially enters an accounting code for every work task. The Supervisor/Foreman should be checking to make sure that appropriate account numbers have been input.
6. **DCA for Location**: Customer Experience uses this section to help determine if the building requires a recharge number for all work.
7. **Comments**: Comments should be input to provide updates or special instructions. Technicians should be adding comments to update customers of their progress or important details about the task.
8. **Related Documents**: Related documents are used to attach photos or documents that are relevant to the task.
9. **Responsible Organization**: Customer Experience assigns each task to the appropriate shop initially. Shops should re-assign to different shop when necessary
10. **Planned**
    a. Assigned Date: System generated date when the responsible person is assigned. A responsible person will begin work within 10 days of the assigned date.
    b. Planned Start Date: Date used for planning purposes. Auto generated for PM tasks based on the date the PM is due.
    c. Planned End Date: Date used for planning purposes. Auto generated for PM tasks based on the date the PM is due.
    d. Project Task Sequence #: Sequence number of a task associated to a project.
    e. Estimated Assignment Date: System Generated based on shop backlog by priority



11. **Responsible Person**: Shop technician responsible for ensuring all work is completed for the task.
12. **Resources**: Additional technicians assigned to assist with the task. Multiple shops can be assigned as resources to assist with the task as well. *You must be a resource to charge time to a task
13. **Unbilled Time Log/Billed Time Log**: List of all time entries for a task
14. **Resolution Description**: Description field for the technician to identify the work they performed.
15. **Assets**: Technician assigns the asset that they performed work on. This is required for corrective work only.
    a. Work Analysis: Technician creates a work analysis to identify the failure, cause, remedy, etc. of the task. This is required for corrective work only.



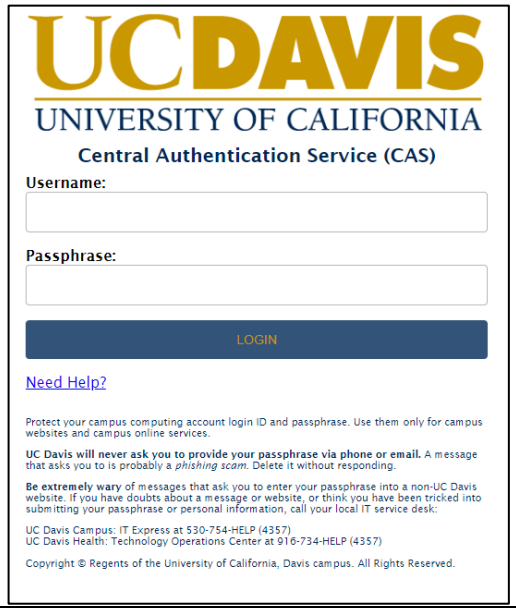
16. **Quick Estimates**: Estimate provided to customer for the task.
17. **Estimated Cost**
    a. Authorized Amount: Amount authorized by the customer that is not to be exceeded
    b. Estimated Costs: This section calculates the total costs from the quick estimates section. If this is a PM task the procedure costs would be shown here.
18. **Actual Cost Summary**: Summary of Actual accrued costs for time entries and materials used.
19. **Material List**: Auto populated with actual materials charged against this task
20. **Actual**
    a. Actual Start: System generated start date based on the date of the first time entry
    b. Actual End: System generated end date based on the date of the last time entry upon completion
    c. Last Time Entry: System generated date of the last time entry entered
    d. Completed Date: System generated date indicating when the task status was changed to completed.

Viewing All Work Tasks in System

This section explains the steps necessary to search for any **Work Task** in the system, whether it was assigned to you or not.

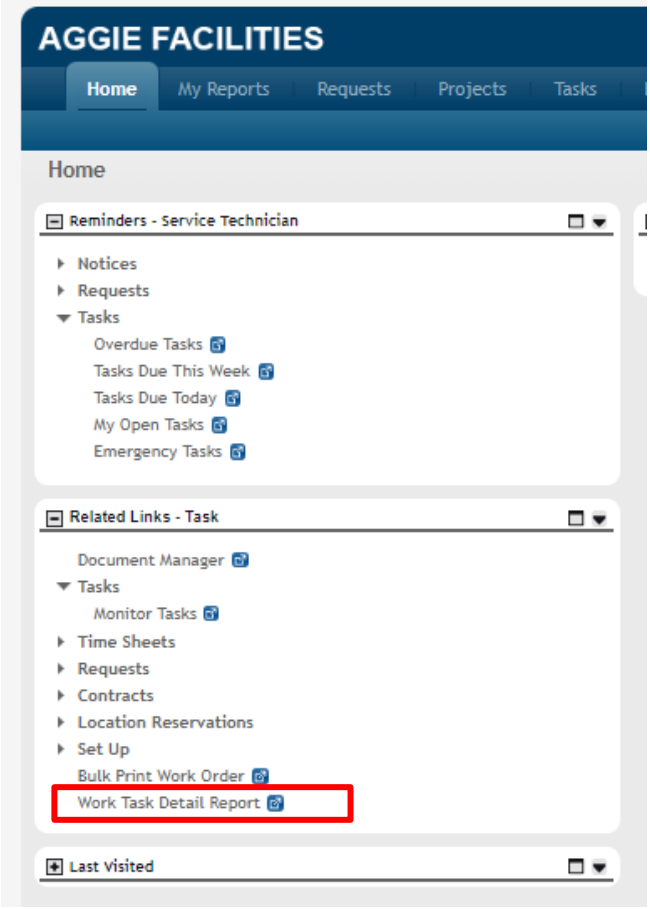
Step 1

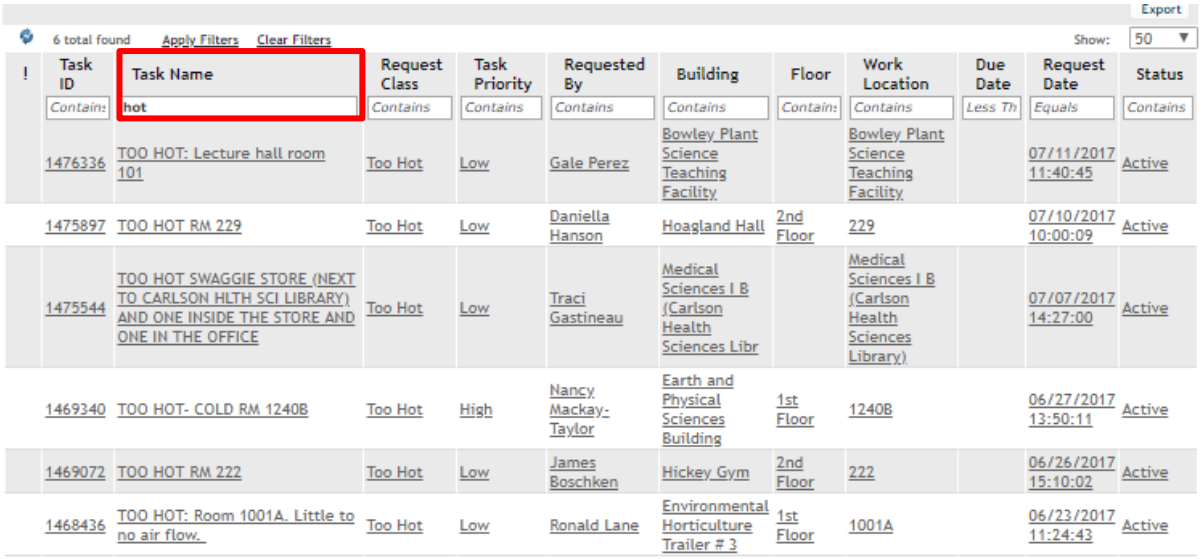
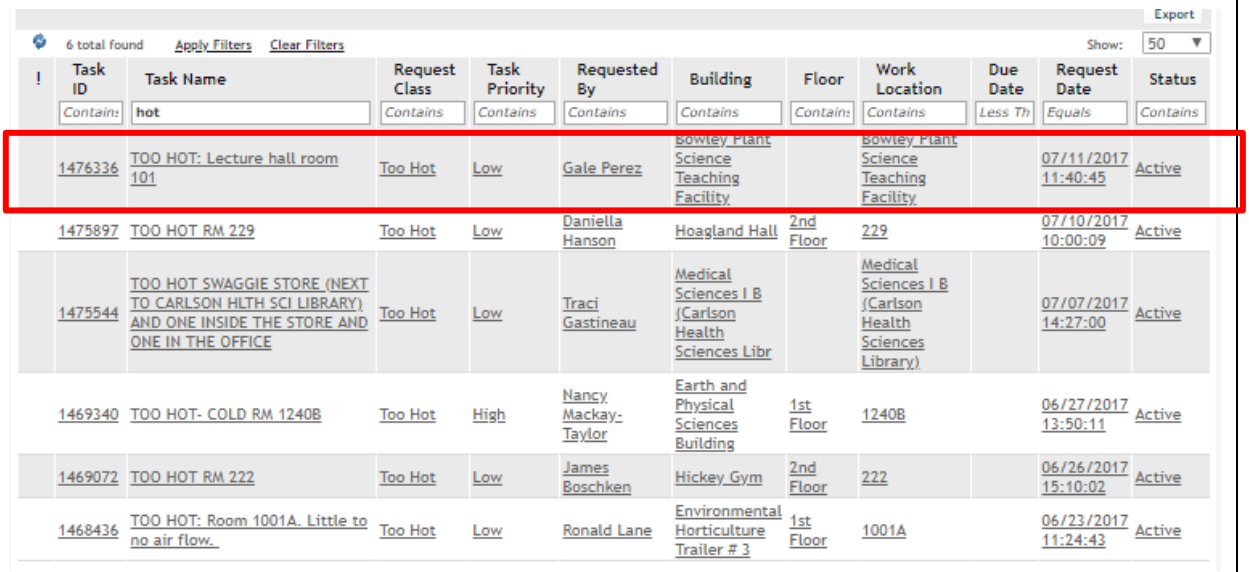
Sign into TRIRIGA as a **Technician** using the appropriate login credentials.



Step 2

Select **Home** > **Work Task Detail Report** (in the left navigation, under "Related Links – Task")



Step 4	Type information in any of the column headers (e.g., **Description, Technician, Task Status,** etc.) and select **Enter** or **Apply Filters.**  Export 6 total found Apply Filters Clear Filters Show: 50 ! Task ID (Contains) | Task Name (Contains: hot) | Request Class (Contains) | Task Priority (Contains) | Requested By (Contains) | Building (Contains) | Floor (Contains) | Work Location (Contains) | Due Date (Less Th) | Request Date (Equals) | Status (Contains) 1476336 | TOO HOT: Lecture hall room 101 | Too Hot | Low | Gale Perez | Bowley Plant Science Teaching Facility | | Bowley Plant Science Teaching Facility | | 07/11/2017 11:40:45 | Active 1475897 | TOO HOT RM 229 | Too Hot | Low | Daniella Hanson | Hoagland Hall | 2nd Floor | 229 | | 07/10/2017 10:00:09 | Active 1475544 | TOO HOT SWAGGIE STORE (NEXT TO CARLSON HLTH SCI LIBRARY) AND ONE INSIDE THE STORE AND ONE IN THE OFFICE | Too Hot | Low | Traci Gastineau | Medical Sciences I B (Carlson Health Sciences Libr | | Medical Sciences I B (Carlson Health Sciences Library) | | 07/07/2017 14:27:00 | Active 1469340 | TOO HOT- COLD RM 1240B | Too Hot | High | Nancy Mackay-Taylor | Earth and Physical Sciences Building | 1st Floor | 1240B | | 06/27/2017 13:50:11 | Active 1469072 | TOO HOT RM 222 | Too Hot | Low | James Boschken | Hickey Gym | 2nd Floor | 222 | | 06/26/2017 15:10:02 | Active 1468436 | TOO HOT: Room 1001A. Little to no air flow. | Too Hot | Low | Ronald Lane | Environmental Horticulture Trailer # 3 | 1st Floor | 1001A | | 06/23/2017 11:24:43 | Active **Please Note:** in this example the key word "hot" was entered in the **Task Name** field.
Step 5	Select the **Work Task** you wish to view from the results of the search. **Please Note:** do not select **Clear Filters** to conduct a new search, as the system will load all tasks in the system. To do a new search, erase the criteria you no longer need and type the new criteria in the header  Export 6 total found Apply Filters Clear Filters Show: 50 ! Task ID (Contains) | Task Name (hot) | Request Class (Contains) | Task Priority (Contains) | Requested By (Contains) | Building (Contains) | Floor (Contains) | Work Location (Contains) | Due Date (Less Th) | Request Date (Equals) | Status (Contains) 1476336 | TOO HOT: Lecture hall room 101 | Too Hot | Low | Gale Perez | Bowley Plant Science Teaching Facility | | Bowley Plant Science Teaching Facility | | 07/11/2017 11:40:45 | Active 1475897 | TOO HOT RM 229 | Too Hot | Low | Daniella Hanson | Hoagland Hall | 2nd Floor | 229 | | 07/10/2017 10:00:09 | Active 1475544 | TOO HOT SWAGGIE STORE (NEXT TO CARLSON HLTH SCI LIBRARY) AND ONE INSIDE THE STORE AND ONE IN THE OFFICE | Too Hot | Low | Traci Gastineau | Medical Sciences I B (Carlson Health Sciences Libr | | Medical Sciences I B (Carlson Health Sciences Library) | | 07/07/2017 14:27:00 | Active 1469340 | TOO HOT- COLD RM 1240B | Too Hot | High | Nancy Mackay-Taylor | Earth and Physical Sciences Building | 1st Floor | 1240B | | 06/27/2017 13:50:11 | Active 1469072 | TOO HOT RM 222 | Too Hot | Low | James Boschken | Hickey Gym | 2nd Floor | 222 | | 06/26/2017 15:10:02 | Active 1468436 | TOO HOT: Room 1001A. Little to no air flow. | Too Hot | Low | Ronald Lane | Environmental Horticulture Trailer # 3 | 1st Floor | 1001A | | 06/23/2017 11:24:43 | Active

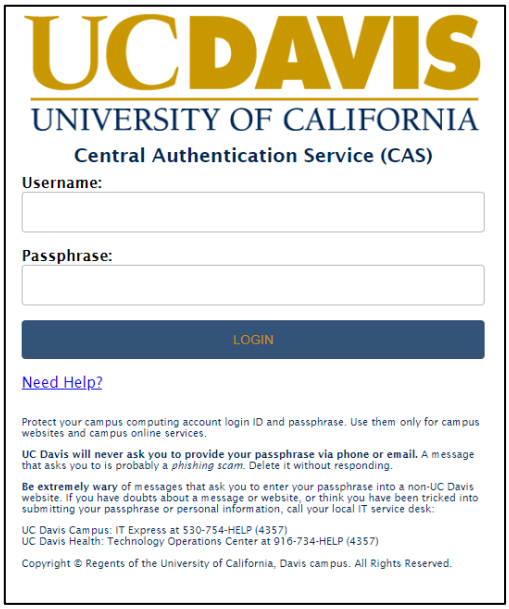
Submitting/requesting a new task

This section explains the steps necessary for a **Technician** to create a new **Work Task** for another shop, which can be completed in lieu of requesting that the Customer Support Center create a new "ticket."

This also allows **Technicians** to complete "tickets" for themselves.

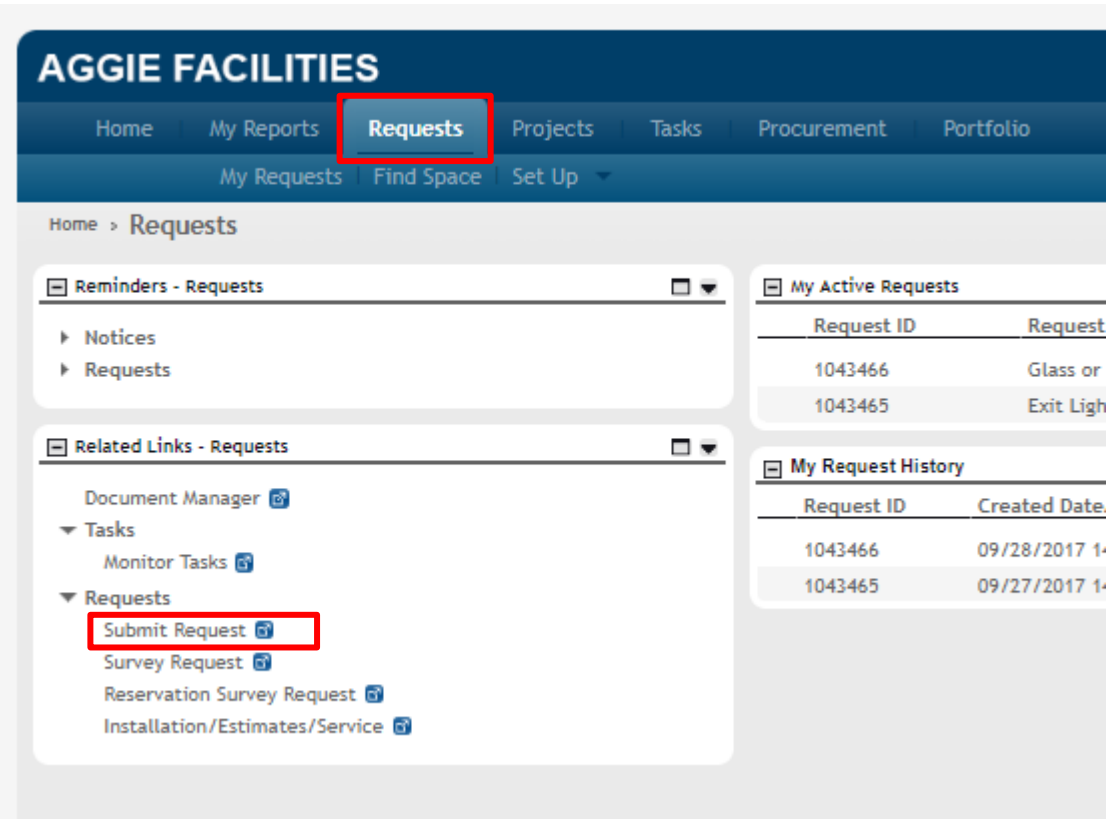
Step 1

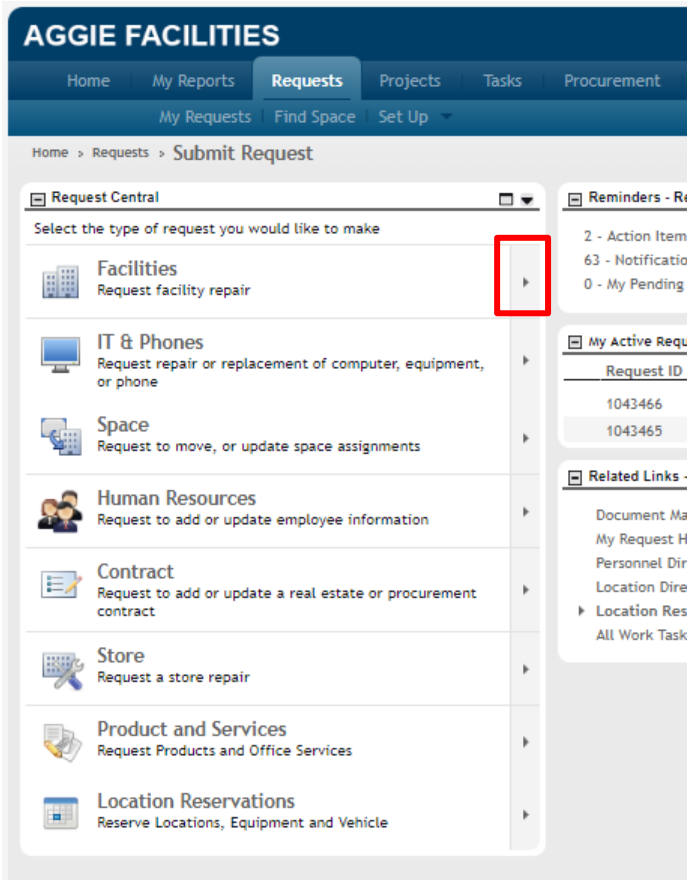
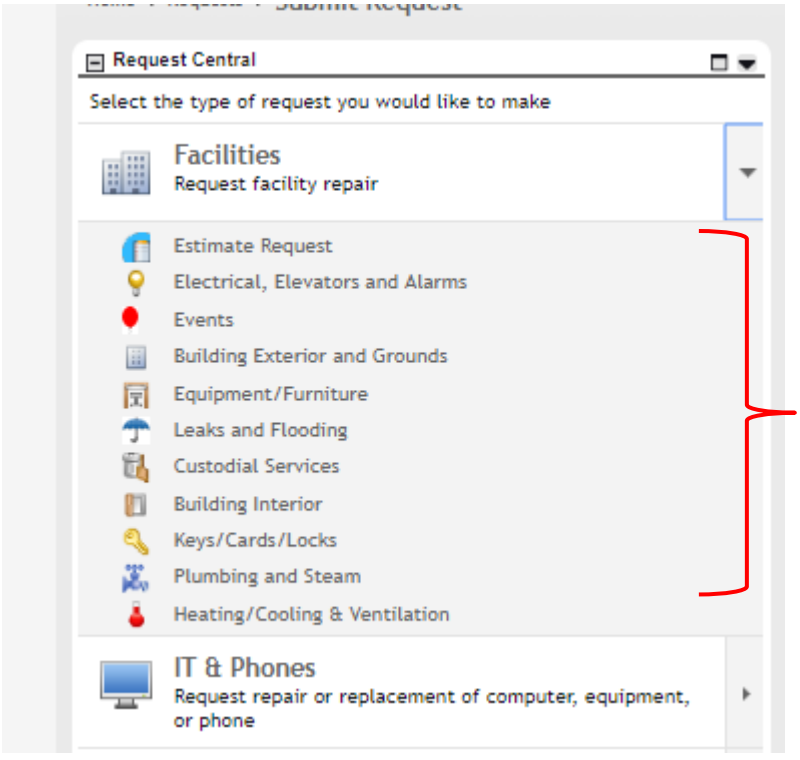
Sign into TRIRIGA as a **Technician** using the appropriate login credentials.



Step 2

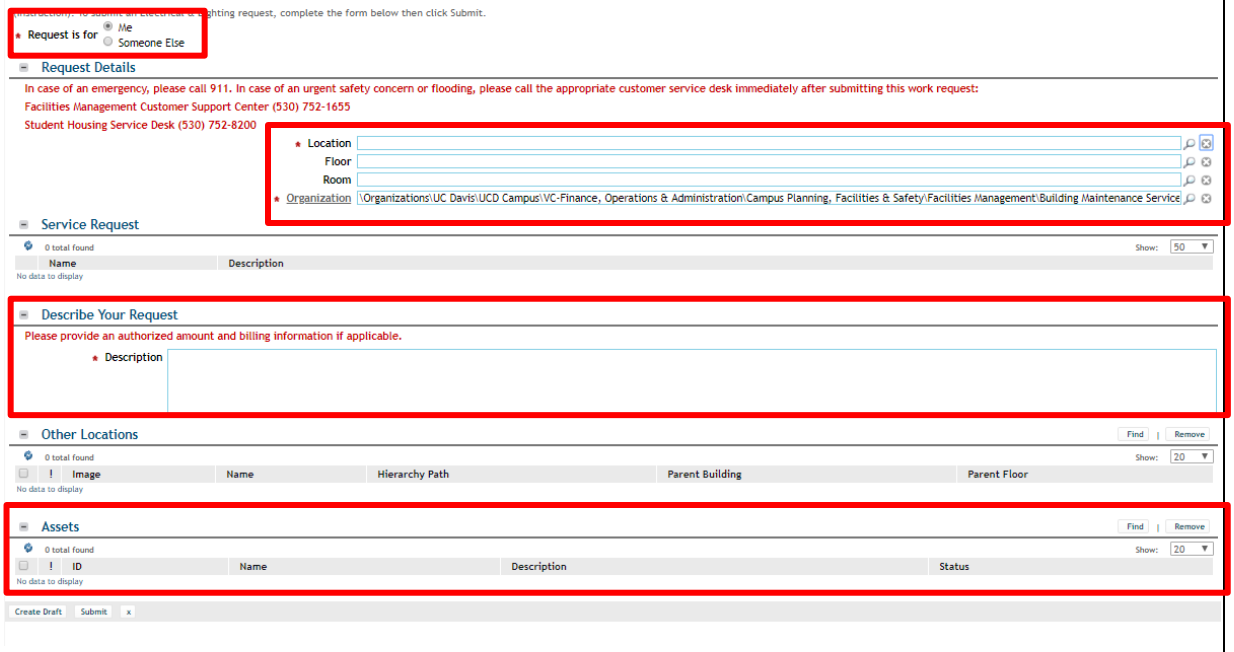
Select **Requests > Submit Request**



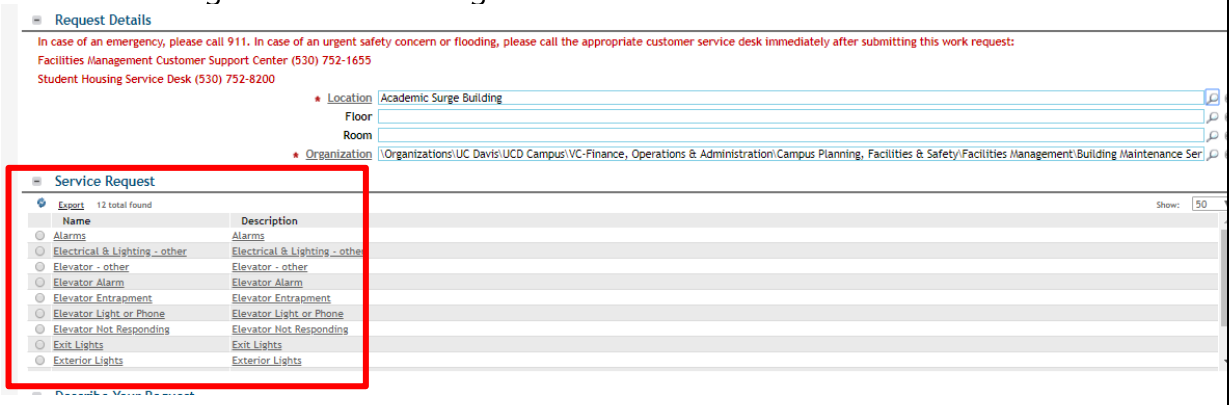
Step 3	On the Submit Request page, select the arrow next to Facilities to view the drop-down menu with available options (after the first time you do this, the menu should always appear) 
Step 4	Click the category that fits the request type.  Select one of these categories

Step 4

Fill out the details of the request

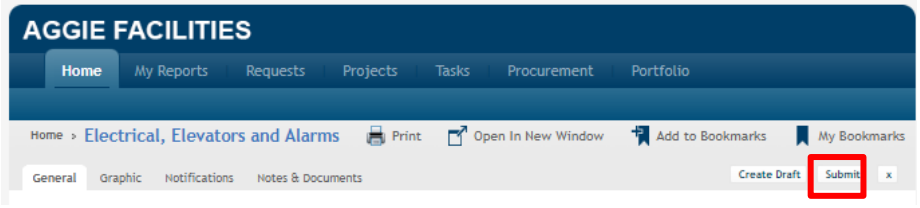


1. **Request for**: indicate if the request is for yourself or someone else
2. **Location:** Enter the building. This is a smart-search function, so if you begin typing the location, options will appear for you to select from
3. **Organization:** auto-populates
4. **Service Request:** once location is input, select the request class from the list that is auto-generated (see example below)
5. **Description**: description of the work performed. Be as detailed as possible, as this is the only information Customer Experience is provided with to route this task appropriately
6. **Other location**s: use this if multiple rooms or locations need to be worked on
7. **Assets**: If you know the asset that needs to be worked on, please provide by selecting find and indicating the correct asset



Step 4

Last, submit the request.

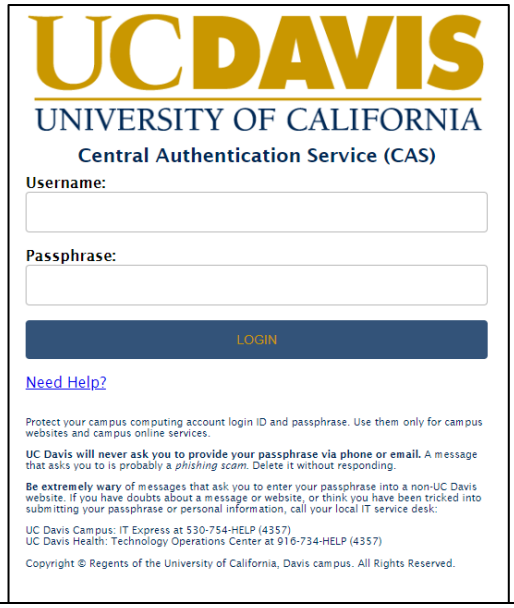


Adding Time to Work Task

In this section you will learn how to add time (**Straight Time, Overtime**) to a **Work Task**.
Please Note: you can only put time a **Work Task** when you have been assigned as a **Resource**. If a **Work Task** does not appear in your queue (i.e., you were never assigned the task) you can locate the **Work Task** and add yourself as a **Resource**.

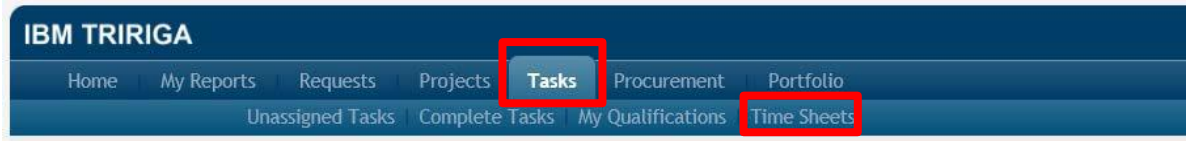
Step 1

Sign into TRIRIGA as a **Technician** using the appropriate login credentials.



Step 2

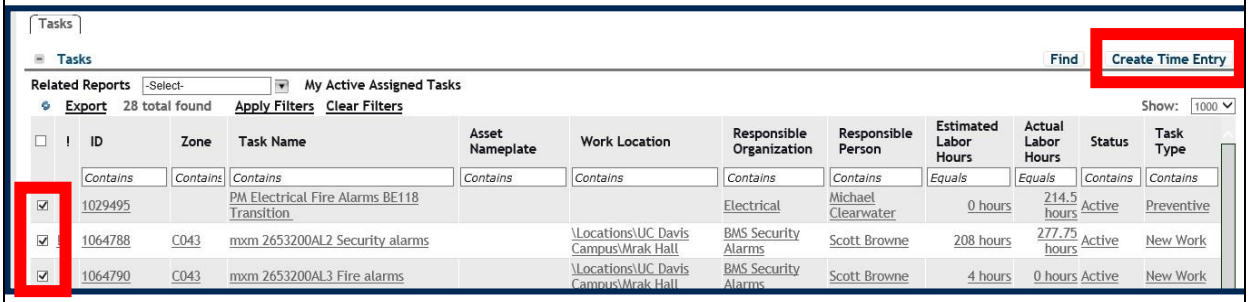
Select **Tasks > Time Sheets**



Step 3

All **Work Tasks** to which you've been assigned as a **Resource** will appear in this list.

1. Select the BOX or BOXES next to the task(s) on which you want to add time
2. Select Create Time Entry

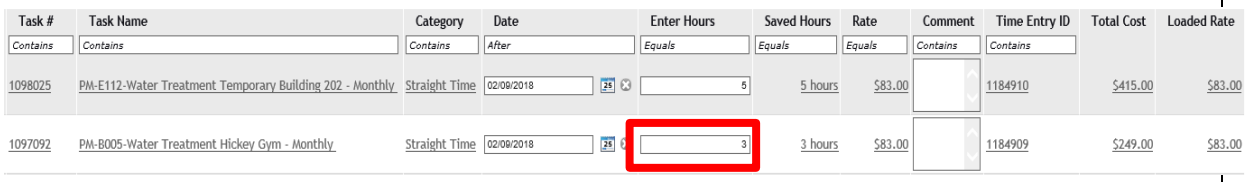


Step 3

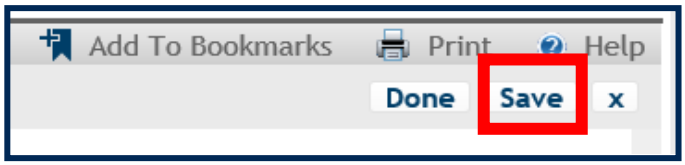
You will now be able to enter time on your selected **Work Task** in the **Time Log** section

1. Enter the number of **Hours** you want to charge to the **Work Task**
2. You can also enter an optional comment
3. Adjust the date to the day work was performed (you should enter your time daily)

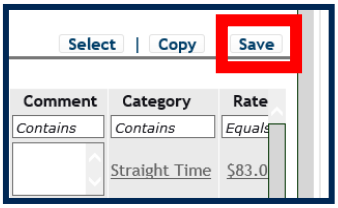
***Please Note: you must enter a ZERO when recording less than a full hour. For example: 0.25, 0.5 & 0.75**



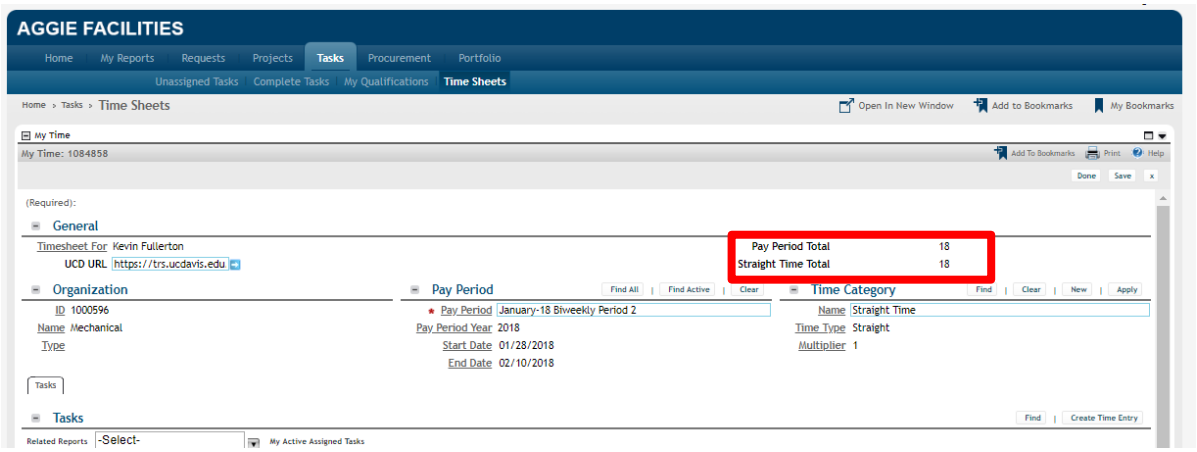
4. Select SAVE at either the top right of the TIME SHEET PAGE or the TIME LOG BOX



OR

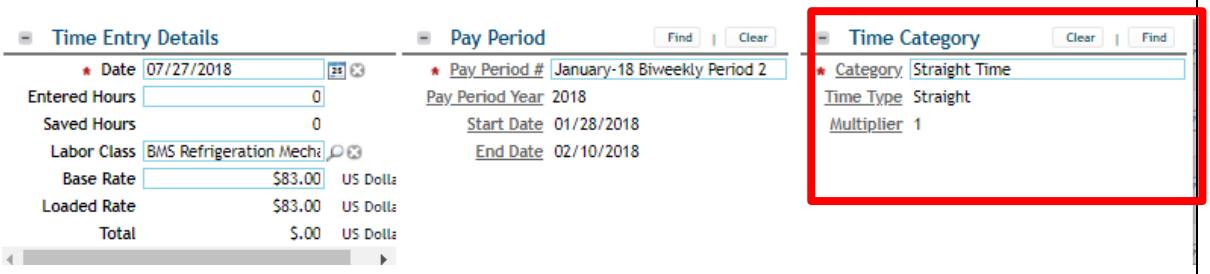


Please Note: your total recorded hours will appear in the **General** section.

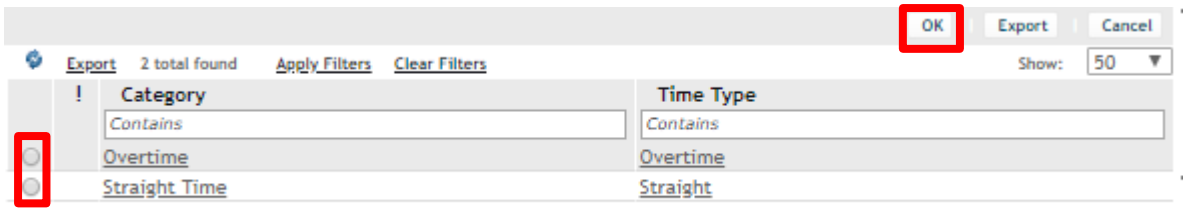


If you select the individual **Time Log Entry** you can change the type of hours applied to it (e.g., **On-Call, Overtime,** etc.)

1. Select the individual **Time Log Entry**
2. In the pop-up window that appears, select **Find** in the **Time Category** section



3. In the pop-up window that appears, select the circle next to the time **Category** you want to choose
4. Select **OK**



5. That pop-up window will disappear and you should select **Save & Close** on the **Time Entry** window.

*You can also update the date and pay period

If you get an error code when entering time:

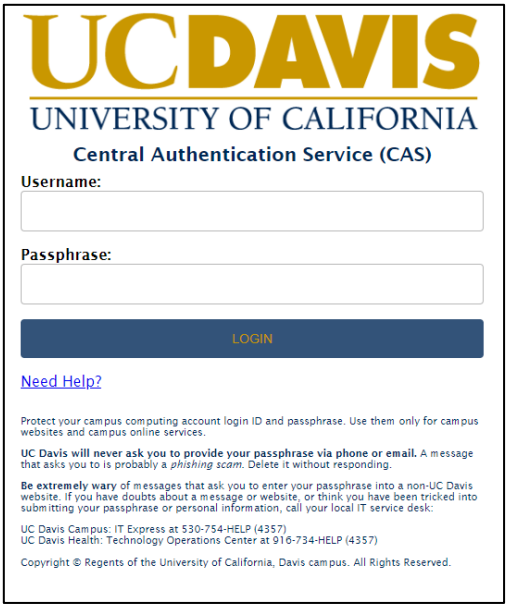
Code	Reason	Solution
PP MSMATCH	The date you selected is not within the current pay period	Correct the date in the task to be in the current pay period OR open the time entry record, select Find, select the appropriate pay period, Save & Close
EST HOURS	Time entered exceeds the estimated hours for that task	Verify correct time on the task. This error still saves the "Enter Hours" column
ST ERROR 24 HOURS	Time entered is more than 24 hours of straight or overtime hours for the day	Enter the correct hours for that day in the "Enter Hours" column. Check that you placed periods in the correct spot (ex: .25 not 25)
ST ERROR	Time entered exceeds regular straight time hours for a day (ex: 8 or 9 hours)	Enter the correct number of hours in the "Enter Hours" column for that task OR create an overtime entry

Printing a Work Task – Option 1 & Option 2

In this section you will learn how to print both **Single Tasks** and **Bulk Print Tasks**

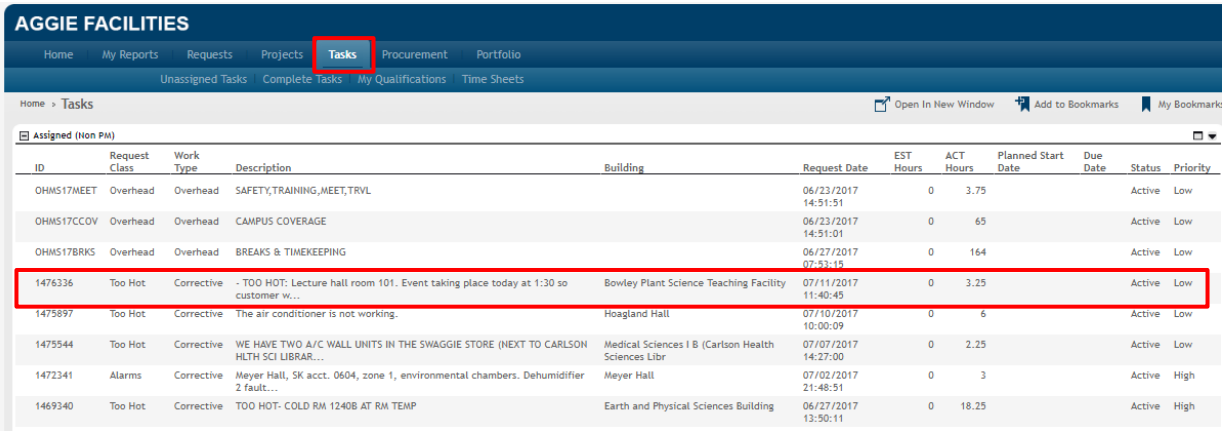
Step 1

Sign into AMS (TRIRIGA) as a **Technician** using the appropriate login credentials.

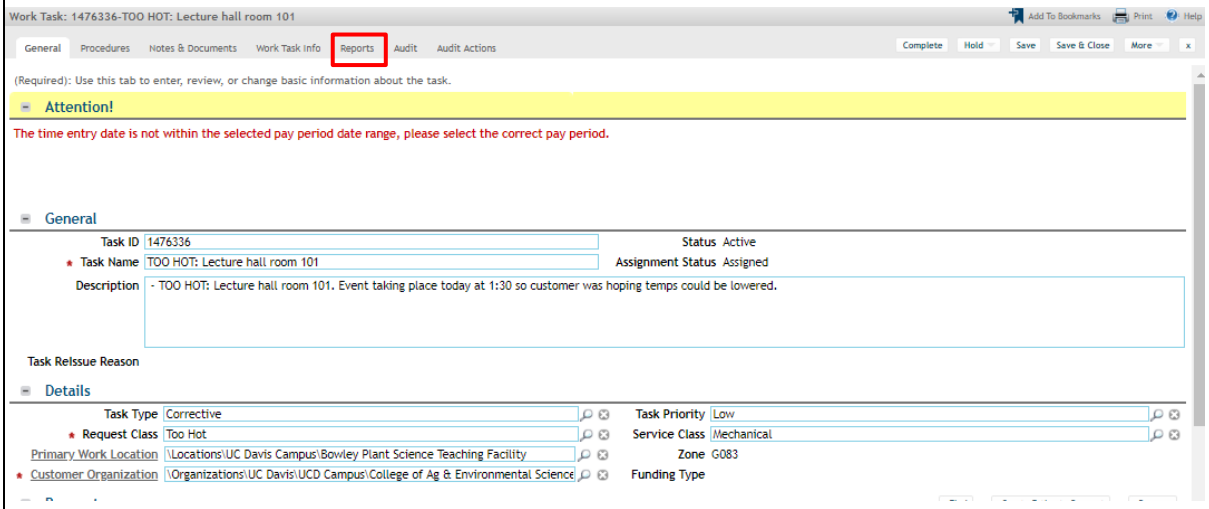
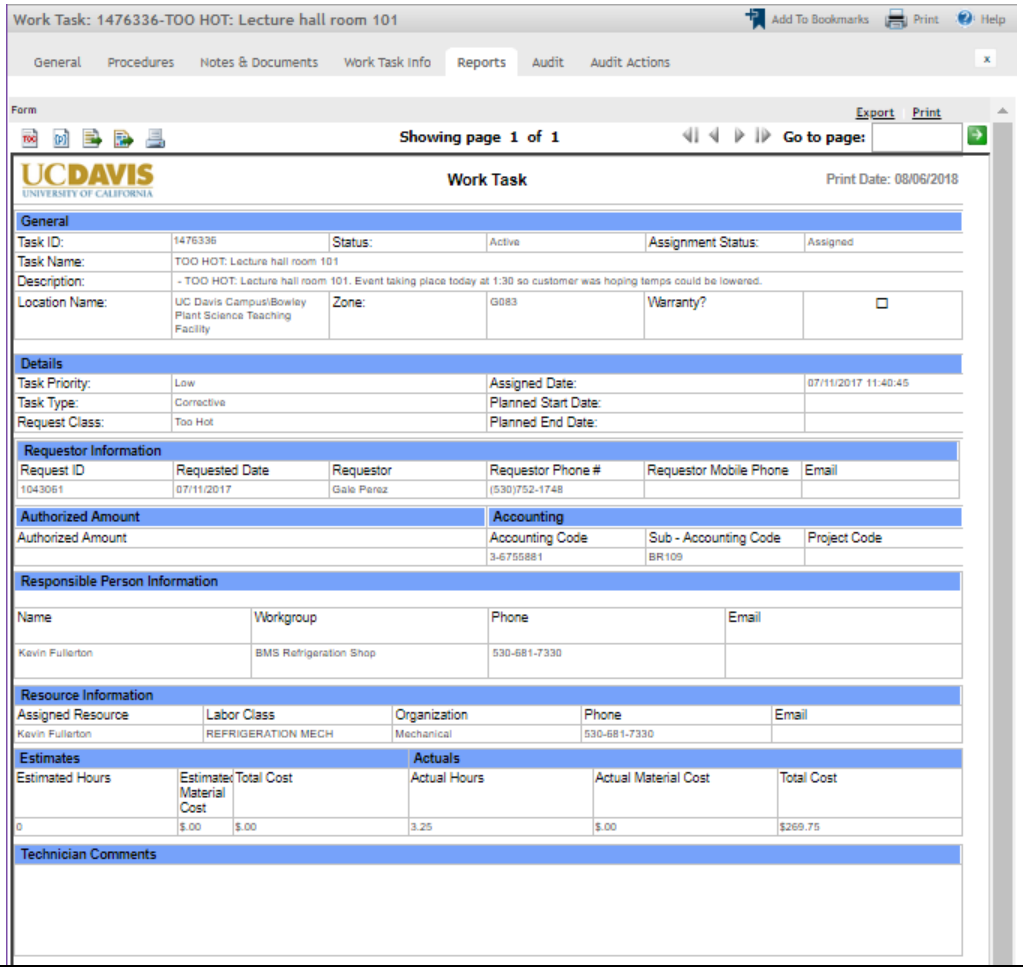


Option 1 Step 2

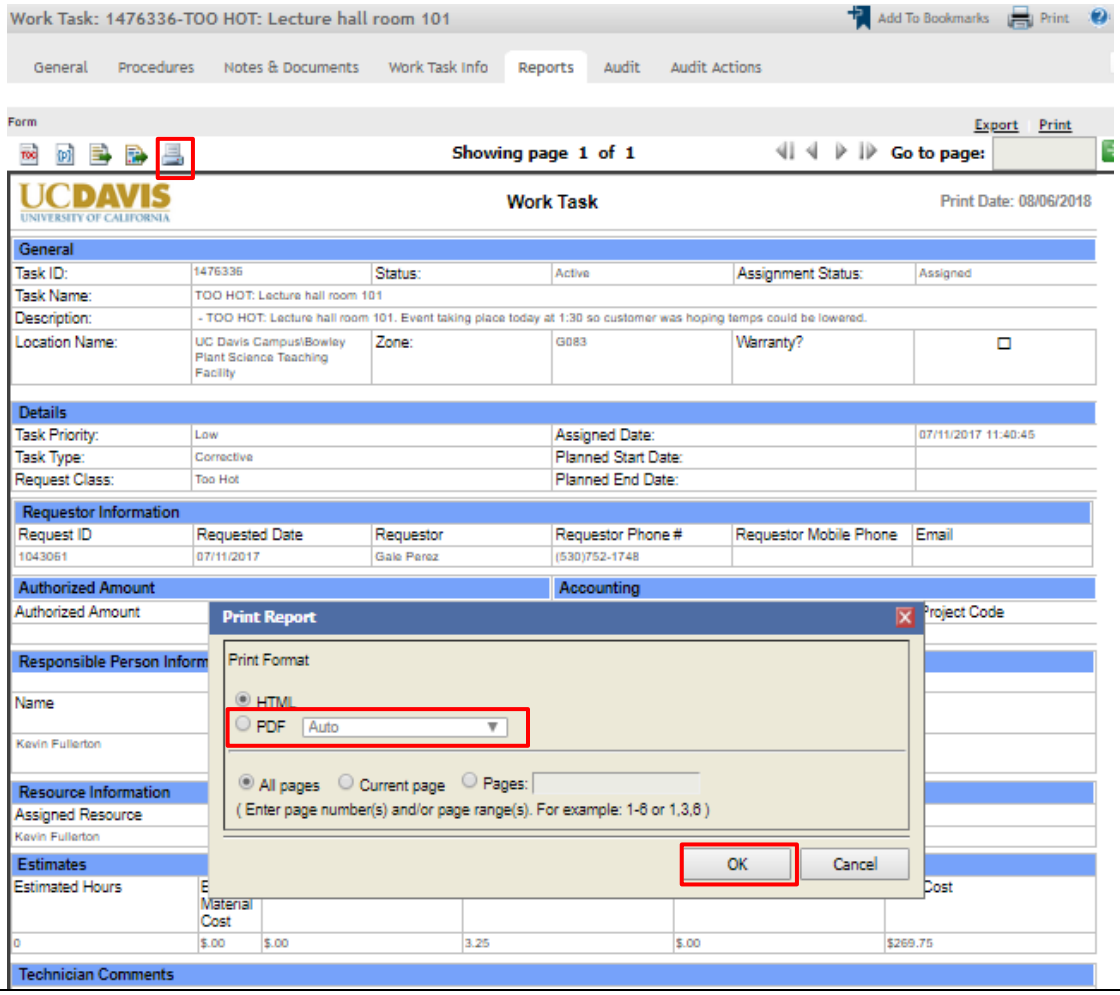
1. Navigate > **Tasks tab** > **Open the task you want to print**



ID	Request Class	Work Type	Description	Building	Request Date	EST Hours	ACT Hours	Planned Start Date	Due Date	Status	Priority
OHMS17MEET	Overhead	Overhead	SAFETY,TRAINING,,MEET,TRVL		06/23/2017 14:51:51	0	3.75			Active	Low
OHMS17CCOV	Overhead	Overhead	CAMPUS COVERAGE		06/23/2017 14:51:01	0	65			Active	Low
OHMS17BRKS	Overhead	Overhead	BREAKS & TIMEKEEPING		06/27/2017 07:53:15	0	164			Active	Low
1476336	Too Hot	Corrective	- TOO HOT: Lecture hall room 101. Event taking place today at 1:30 so customer w...	Bowley Plant Science Teaching Facility	07/11/2017 11:40:45	0	3.25			Active	Low
1475897	Too Hot	Corrective	The air conditioner is not working.	Hoagland Hall	07/10/2017 10:00:09	0	6			Active	Low
1475544	Too Hot	Corrective	WE HAVE TWO A/C WALL UNITS IN THE SWAGGIE STORE (NEXT TO CARLSON HLTH SCI LIBRAR...	Medical Sciences I B (Carlson Health Sciences Libr	07/07/2017 14:27:00	0	2.25			Active	Low
1472341	Alarms	Corrective	Meyer Hall, SK acct. 0604, zone 1, environmental chambers. Dehumidifier 2 fault...	Meyer Hall	07/02/2017 21:48:51	0	3			Active	High
1469340	Too Hot	Corrective	TOO HOT- COLD RM 1240B AT RM TEMP	Earth and Physical Sciences Building	06/27/2017 13:50:11	0	18.25			Active	High

Option 1 Step 3	A pop up of the selected task should appear containing the details of the task. Select the **Reports** tab 
Option 1 Step 4	You should now see the **Work Task** report 

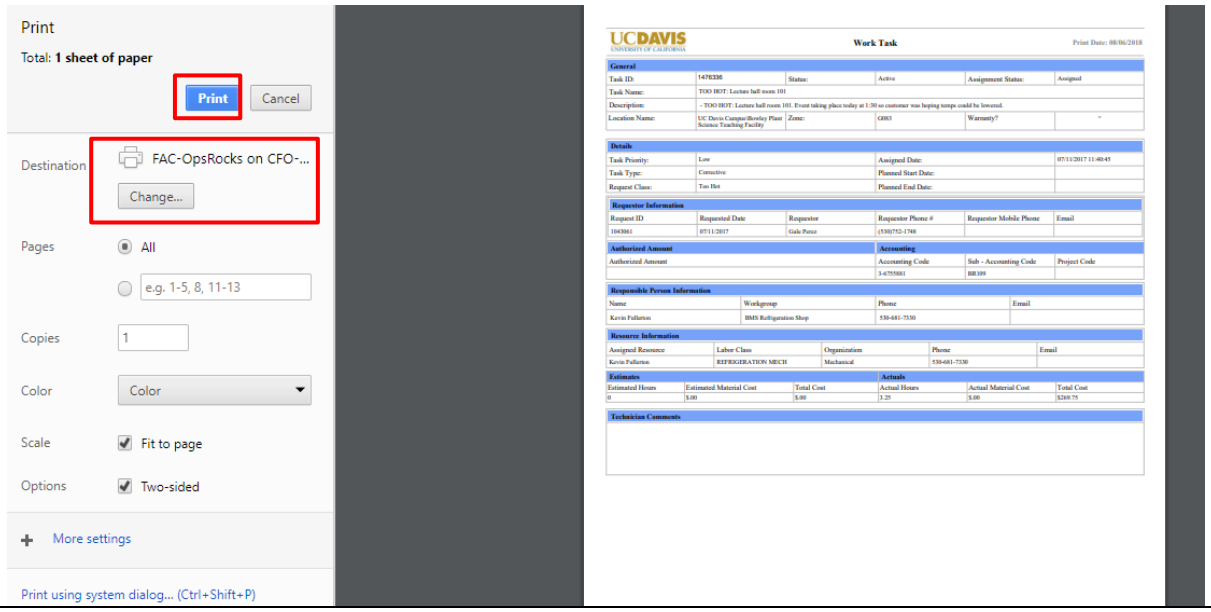
1. Select the **print icon**
2. Select the **PDF option**
3. Select **OK**

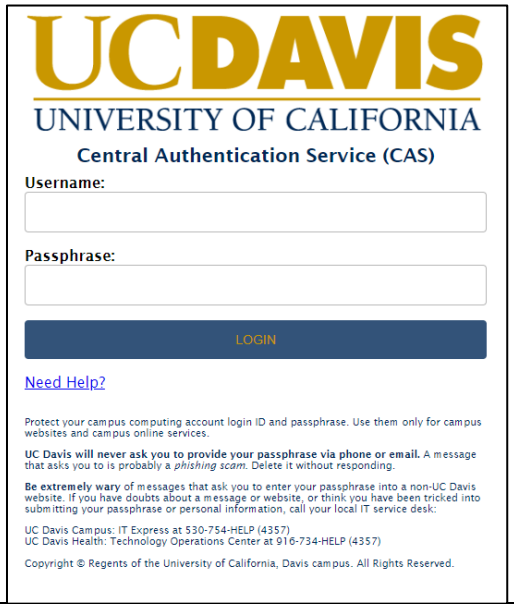
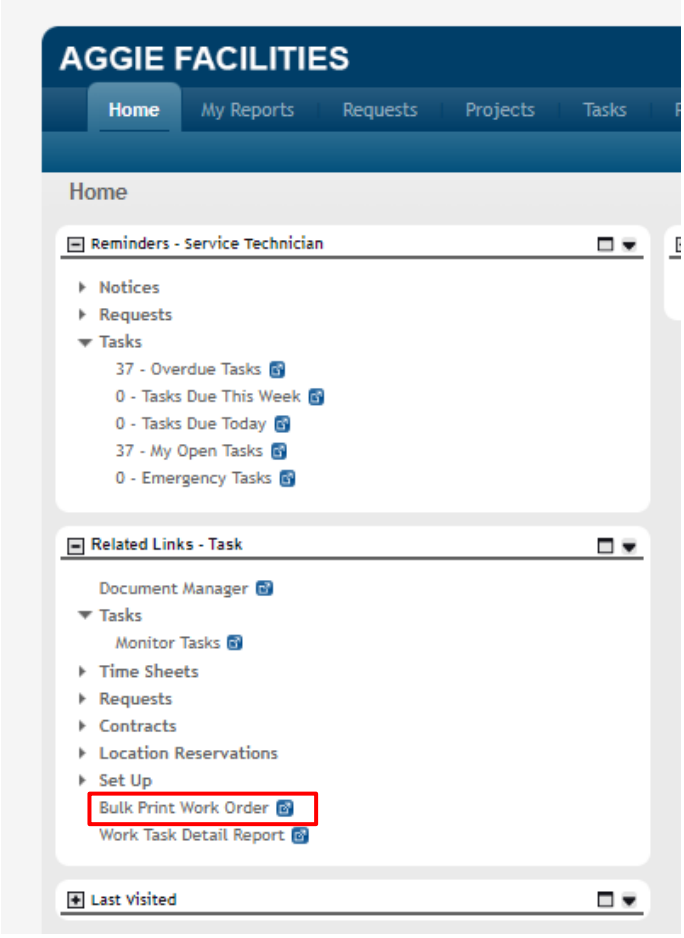


Option 1 Step 5

Select the printer to which you'd like to send the **Work Task**

1. Select **Print**

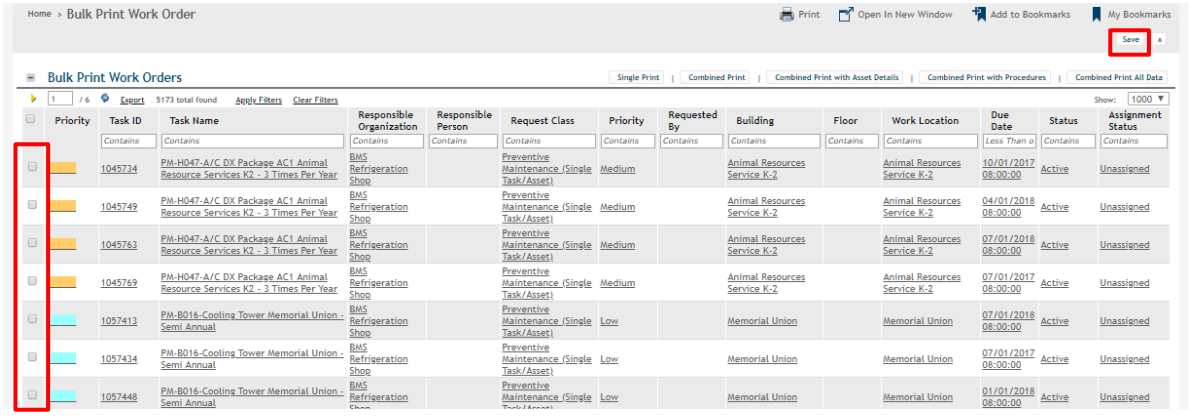


Option 2 – Bulk Print Step 1	Sign into AMS (TRIRIGA) as a **Technician** using the appropriate login credentials. 
Option 2 Step 2	Navigate to the **Home Portal** and scroll down to the **Related Links** portal. Select **Bulk Print Work Order** 

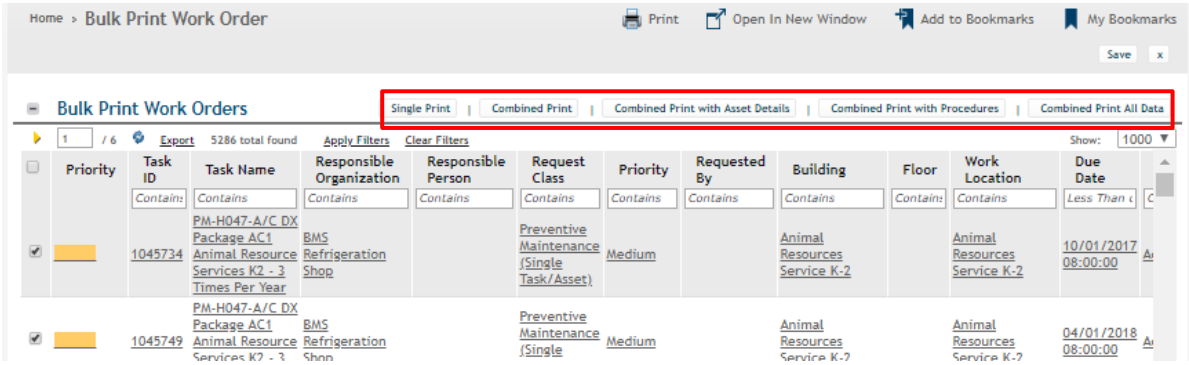
Option 2 Step 3

A **Bulk Print Work Order** portal will appear. **Please Note:** this portal will be populated with all **Active Tasks** assigned to your **Work Group**

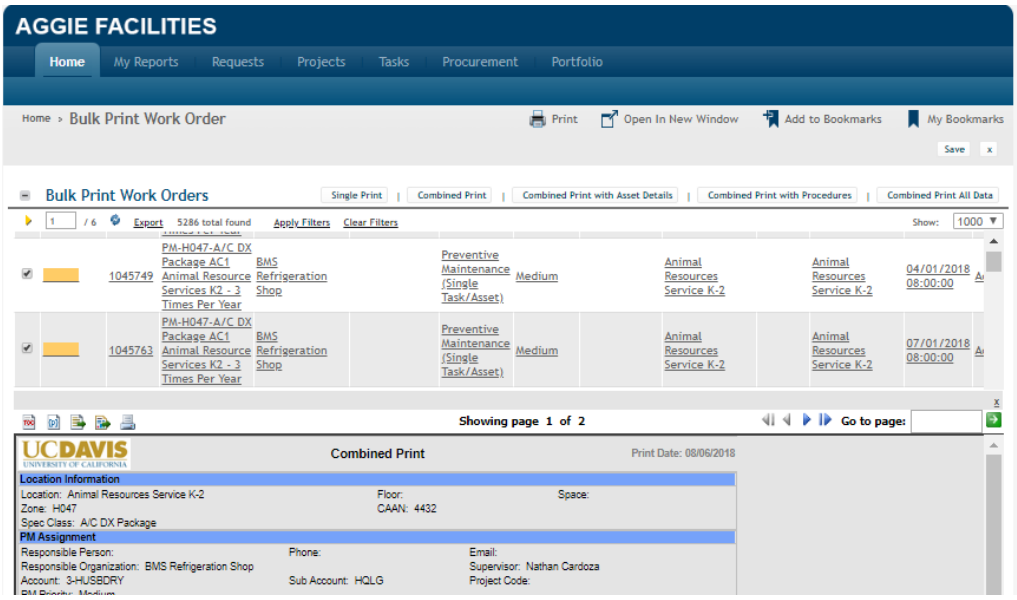
1. You may select one or multiple **Work Tasks** by selecting the checkbox to the left of the **Work Task**
2. Select **Save**

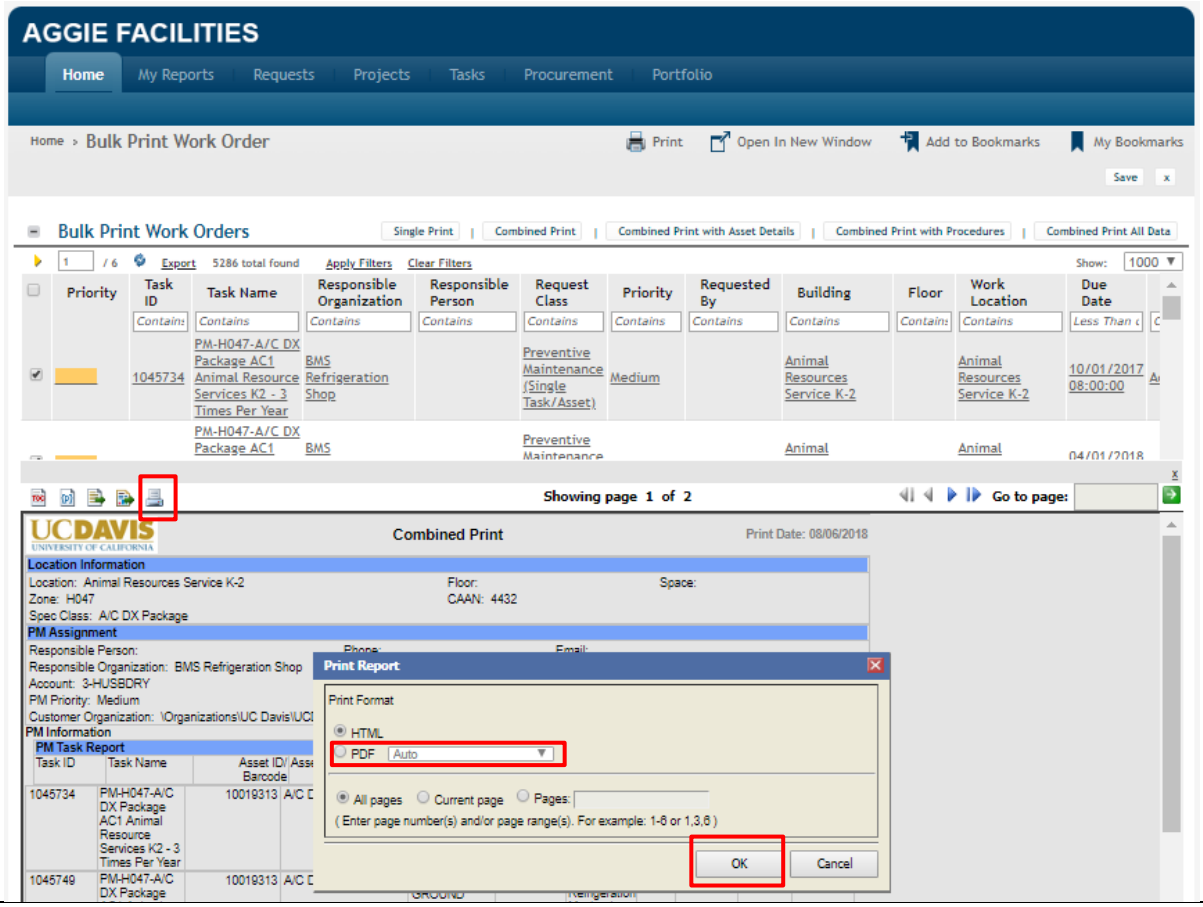
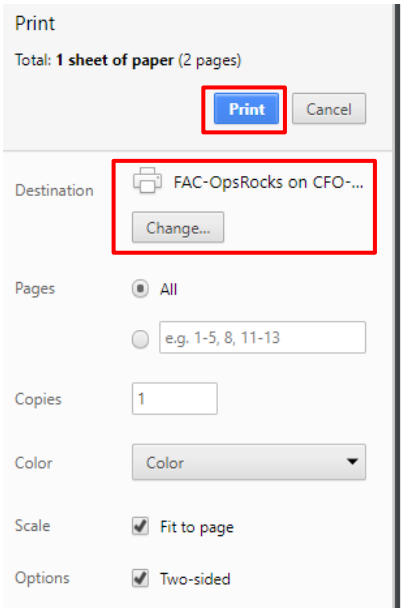
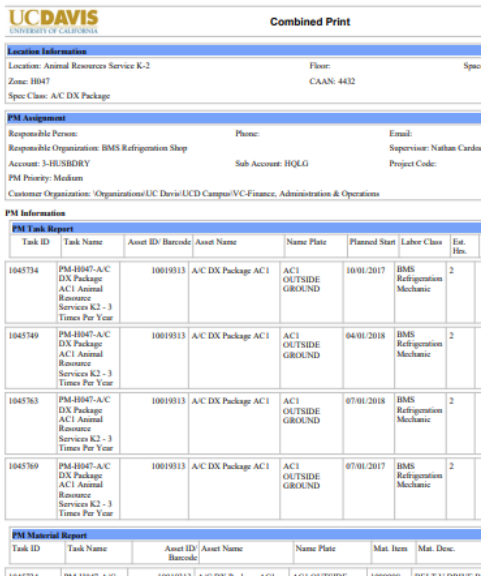


3. Select one of the following options:
   - Single Print – will create a page for each task selected
   - Combined Print options – are for PMs, to print all PMs for one building



A pop-up will appear showing the **Task Bulk Print Report**.



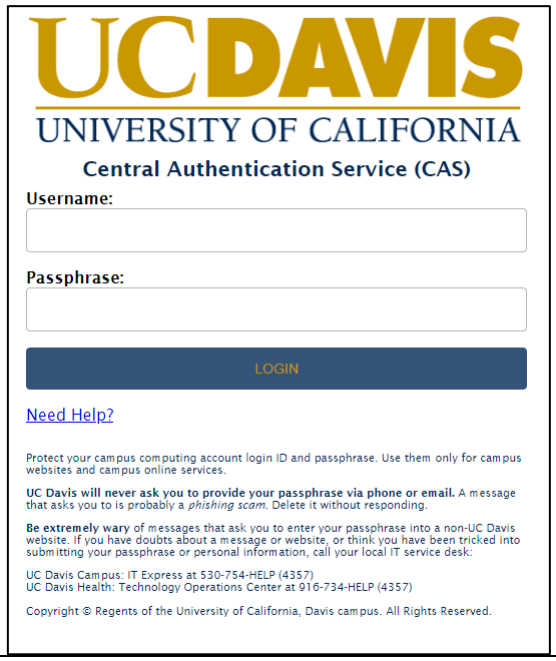
Option 2 Step 4	1. Select the **Printer Icon** 2. Select the **PDF** option 3. Select **OK** 
Option 2 Step 5	Select the printer to which you'd like to send the **Work Task** 1. Select **Print**  

Completing a Work Task

In this section you will learn how to complete a **Work Task** and all the steps needed to successfully do so (e.g., **Assigning Asset (s),** completing **Root Cause Analysis**, etc.

Step 1

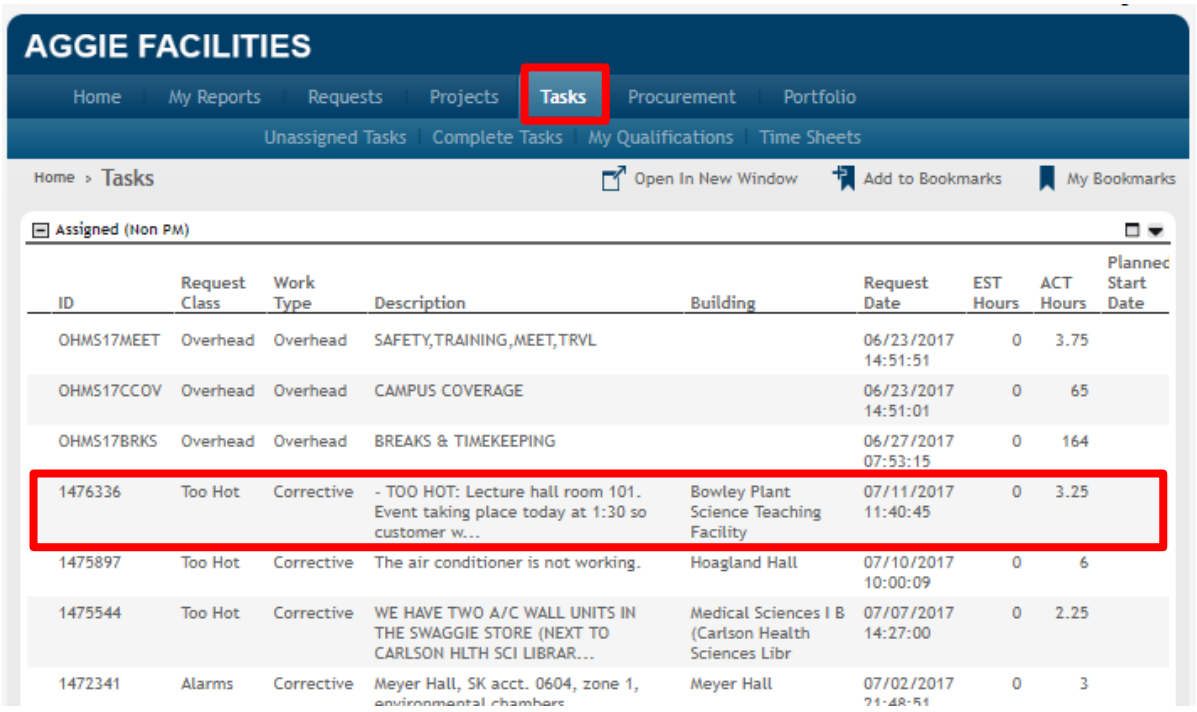
Sign into TRIRIGA as a **Technician** using the appropriate login credentials.



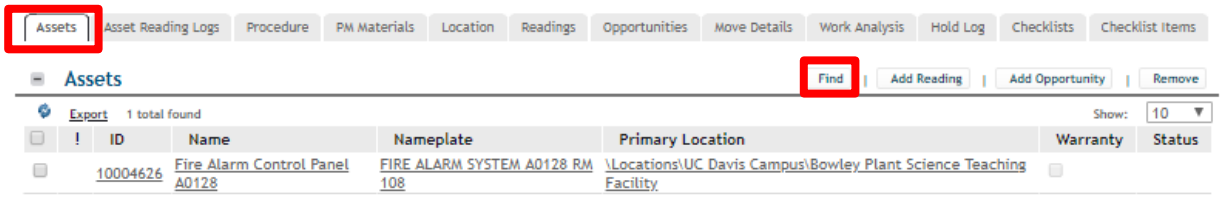
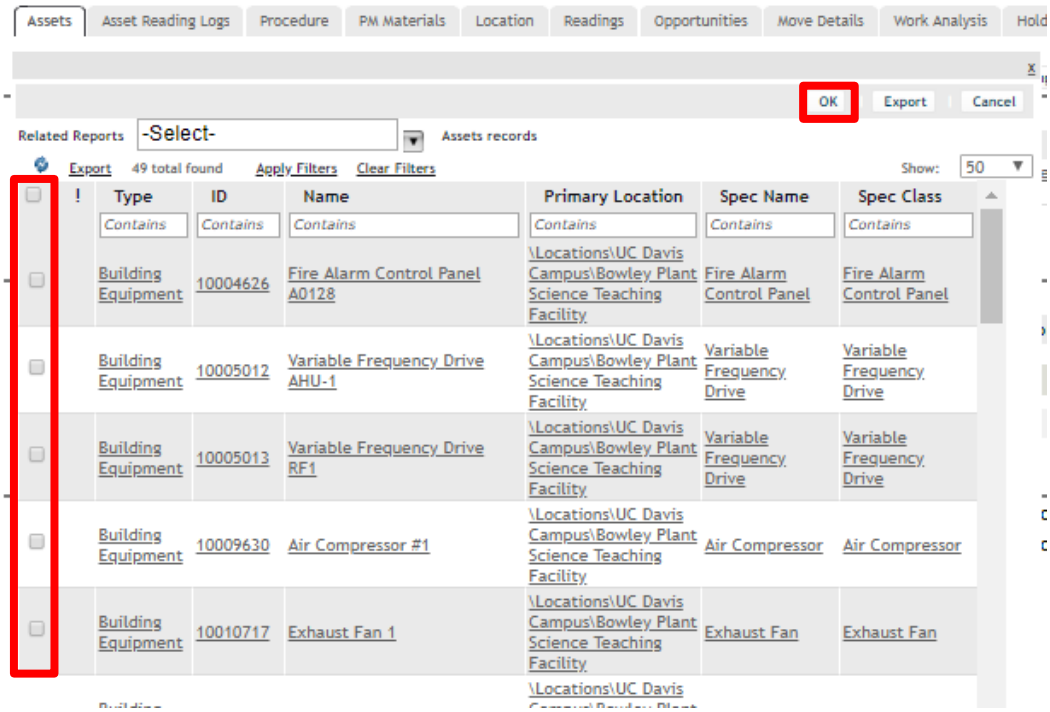
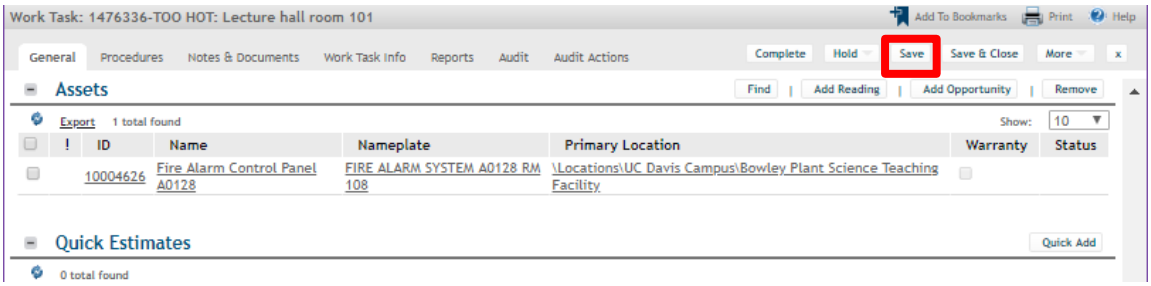
Step 2

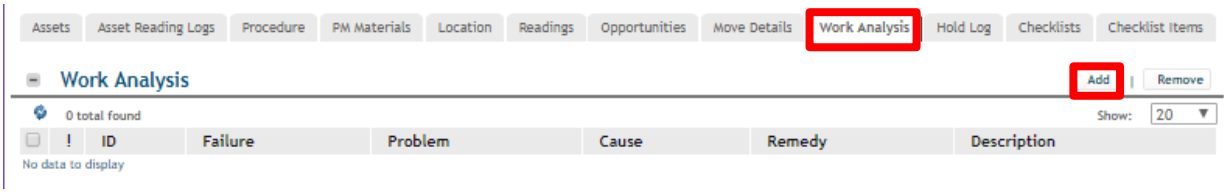
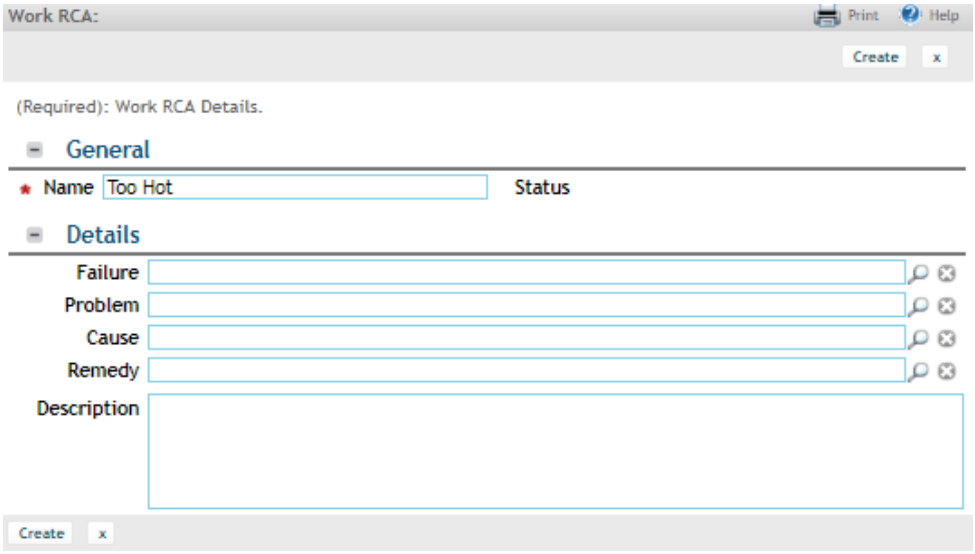
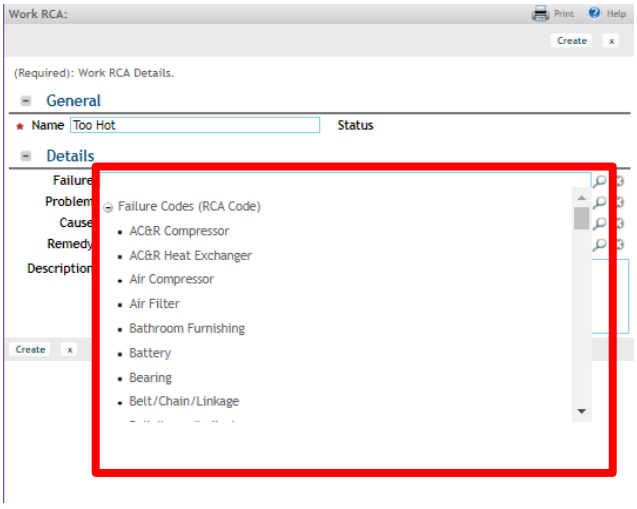
Select **Tasks** to view your **Active Tasks**

1. Select the **Work Task** you want to **Complete**. This will open a pop-up window containing details on that **Work Task**.

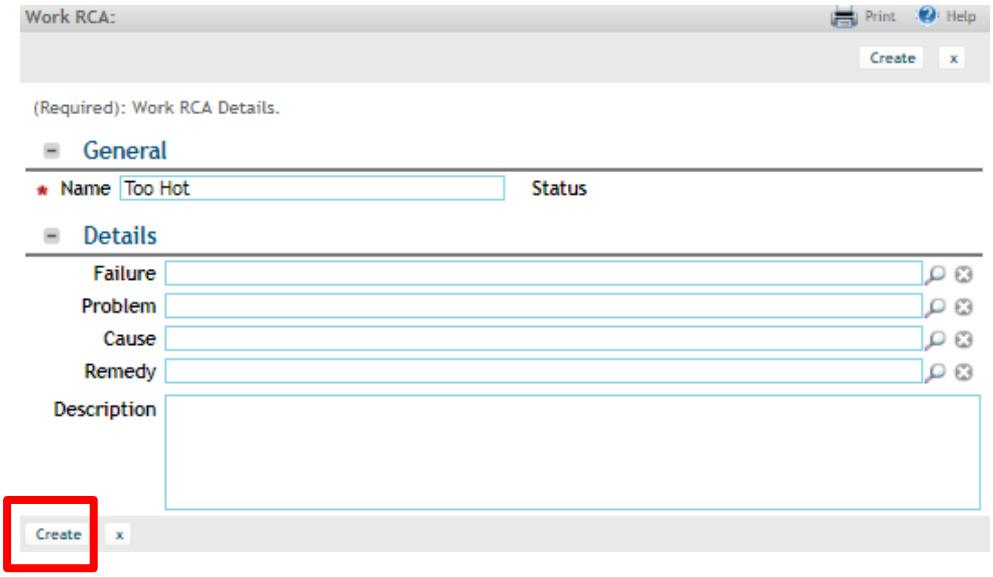


ID	Request Class	Work Type	Description	Building	Request Date	EST Hours	ACT Hours	Planned Start Date
OHMS17MEET	Overhead	Overhead	SAFETY,TRAINING,MEET,TRVL		06/23/2017 14:51:51	0	3.75	
OHMS17CCOV	Overhead	Overhead	CAMPUS COVERAGE		06/23/2017 14:51:01	0	65	
OHMS17BRKS	Overhead	Overhead	BREAKS & TIMEKEEPING		06/27/2017 07:53:15	0	164	
1476336	Too Hot	Corrective	- TOO HOT: Lecture hall room 101. Event taking place today at 1:30 so customer w...	Bowley Plant Science Teaching Facility	07/11/2017 11:40:45	0	3.25	
1475897	Too Hot	Corrective	The air conditioner is not working.	Hoagland Hall	07/10/2017 10:00:09	0	6	
1475544	Too Hot	Corrective	WE HAVE TWO A/C WALL UNITS IN THE SWAGGIE STORE (NEXT TO CARLSON HLTH SCI LIBRAR...	Medical Sciences I B (Carlson Health Sciences Libr	07/07/2017 14:27:00	0	2.25	
1472341	Alarms	Corrective	Meyer Hall, SK acct. 0604, zone 1, environmental chambers	Meyer Hall	07/02/2017 21:48:51	0	3	

Step 3	Scroll down to **Assets** 1. Select **Find**. **Please Note:** this will bring up a list of assets in the **Work Location**.  2. In the pop-up window that appears, select the box(es) next to the **Assets** you worked on. 3. Select **OK**, which will populate the **Assets** field.  4. Select **Save** 

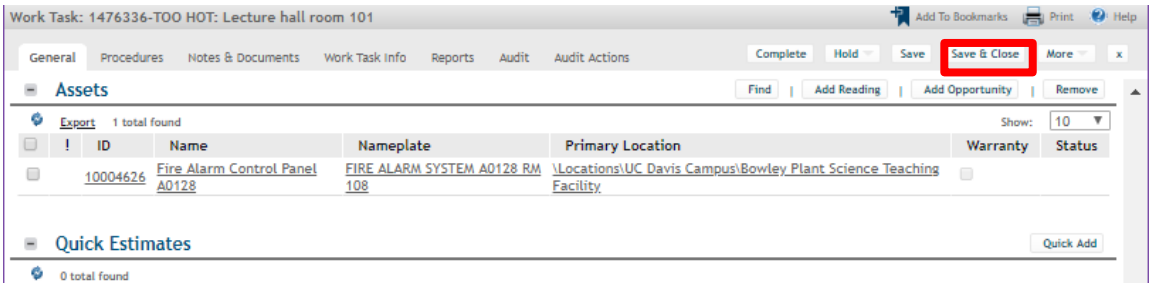
Step 4 Only Required For Routine Corrective Work Tasks	This step explains the process for entering a **Root Cause Analysis** and is **ONLY REQUIRED FOR ROUTINE CORRECTIVE WORK TASKS** Scroll down to **Assets** 5. Select the **Work Analysis** tab. **Please Note:** this hides the **Asset** information. 6. Select **Add**  A pop-up window titled **Work RCA** will appear.  7. Select the magnifying glass next to each of the **Details** which will produce a dropdown menu offering a series of codes 

8. Select the appropriate code for each of the fields:
    a. **Failure**
    b. **Problem**
    c. **Cause**
    d. **Remedy**
9. Enter a **Description**
10. Select **Create** which will close the **Work RCA** pop-up window.



The **Work RCA** you just completed will appear in the **Work Analysis** section.

1. Select **Save** or **Save & Close**

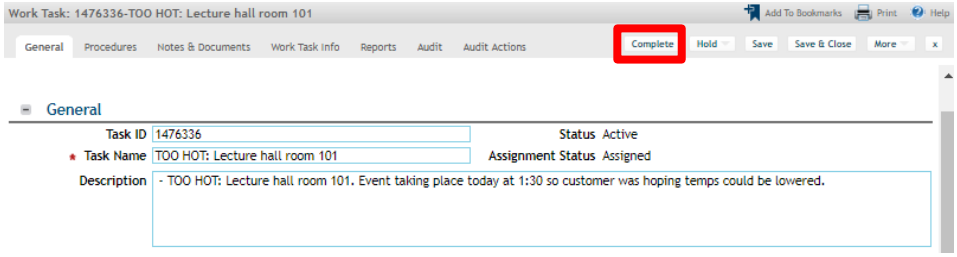


Step 5

When the task is **Complete (Only the responsible person should complete the task)** and you have added the following information:

1. Make sure all other trades, as applicable, have completed their work
2. Make sure all time is entered for the task
3. If corrective, aslo:
    i. **Assign Asset(s) for (only for Routine Corrective Work Tasks)**
    ii. **Complete the RCA (only for Routine Corrective Work Tasks)**

Then, select **Complete**



Bulk Completing Work Tasks

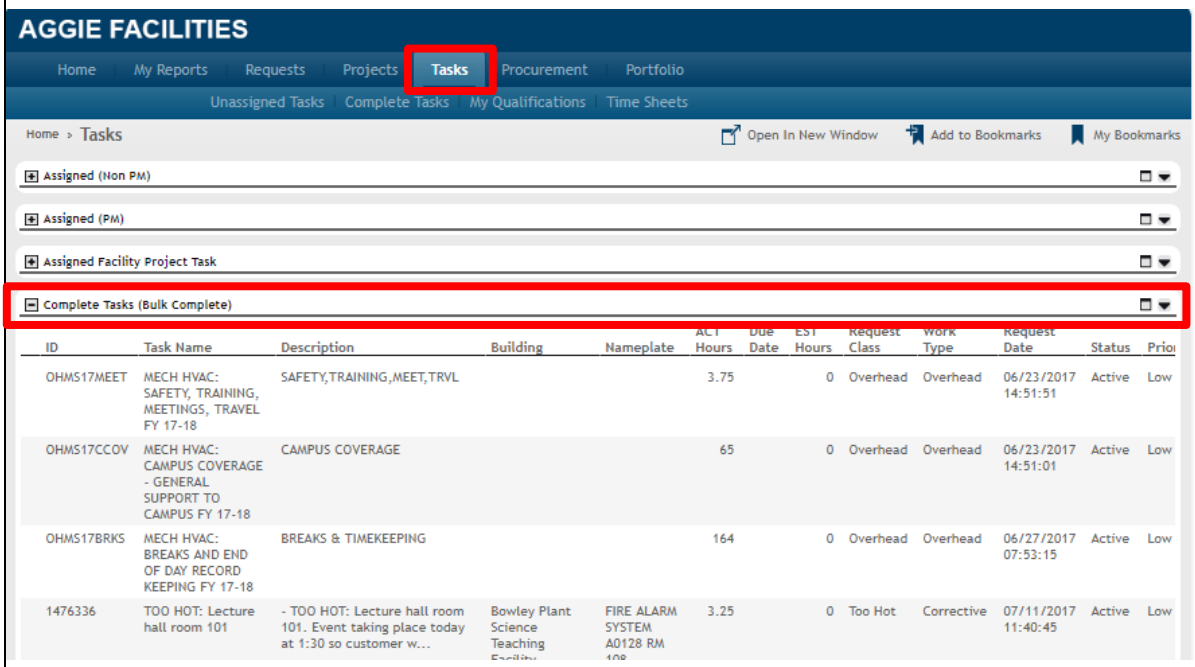
In this section you will learn how to bulk complete **Work Tasks**

Step 1

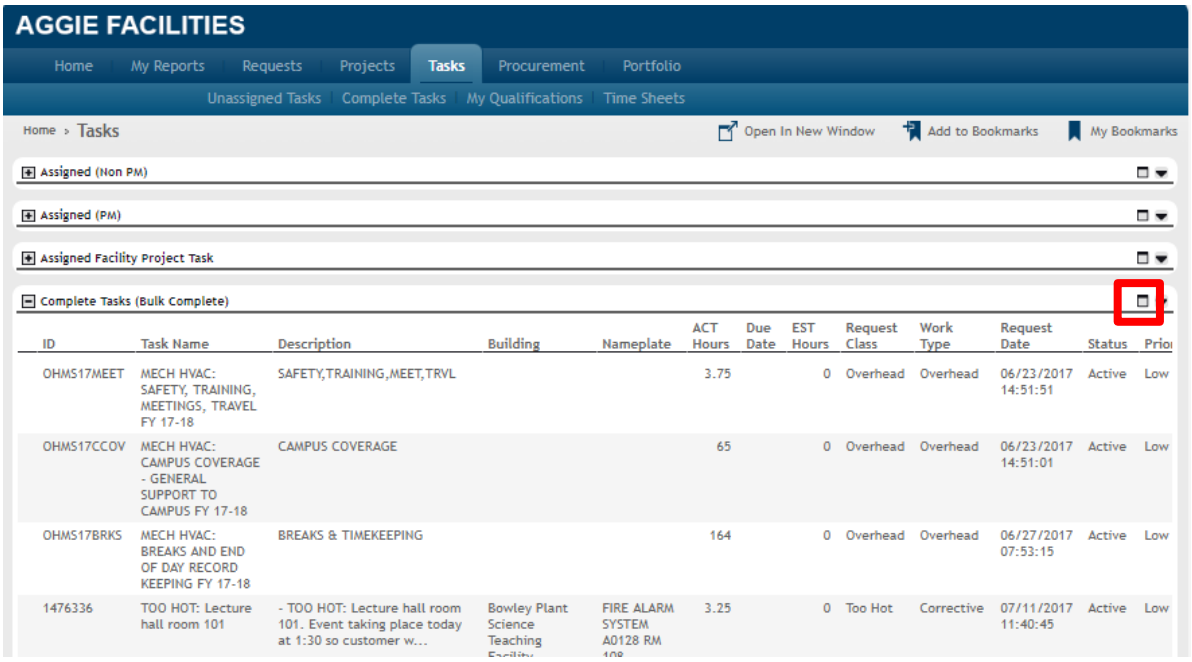
When the tasks are **Complete (Only the responsible person should complete the tasks)** and you have added the following information:

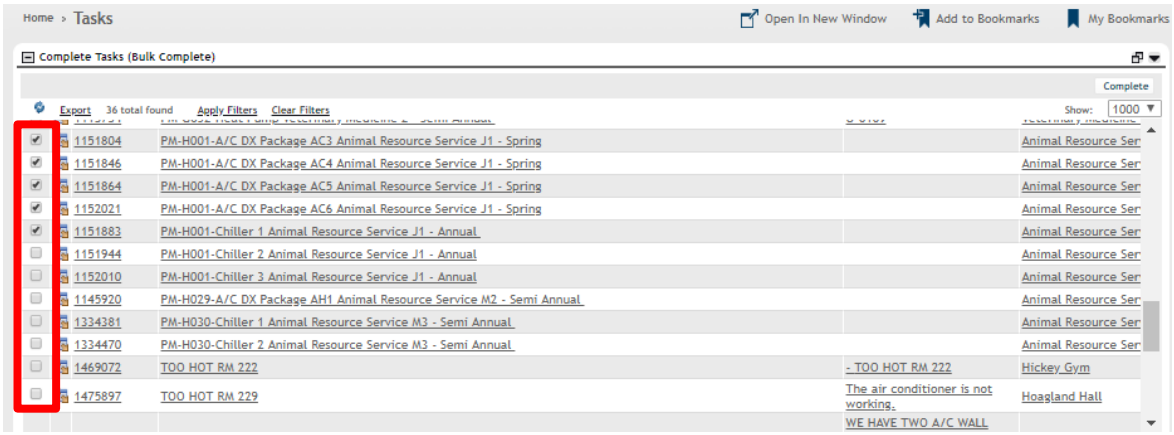
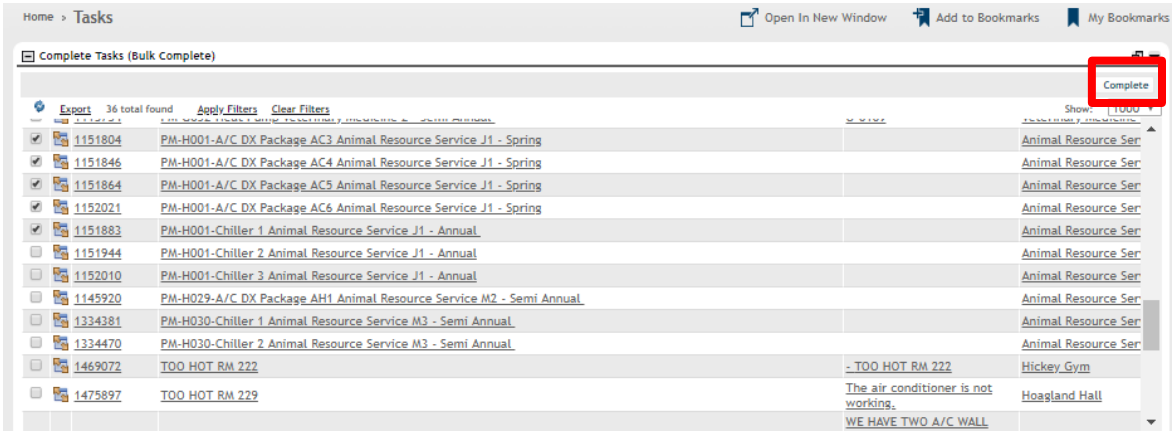
1. Make sure all other trades, as applicable, have completed their work
2. Make sure all time is entered for the task
3. If corrective, aslo:
    iii. **Assign Asset(s) for (only for Routine Corrective Work Tasks)**
    iv. **Complete the RCA (only for Routine Corrective Work Tasks)**

THEN, go the **Tasks** tab and scroll down to **Complete Tasks (Bulk Complete)**



Select the **Maximize button**



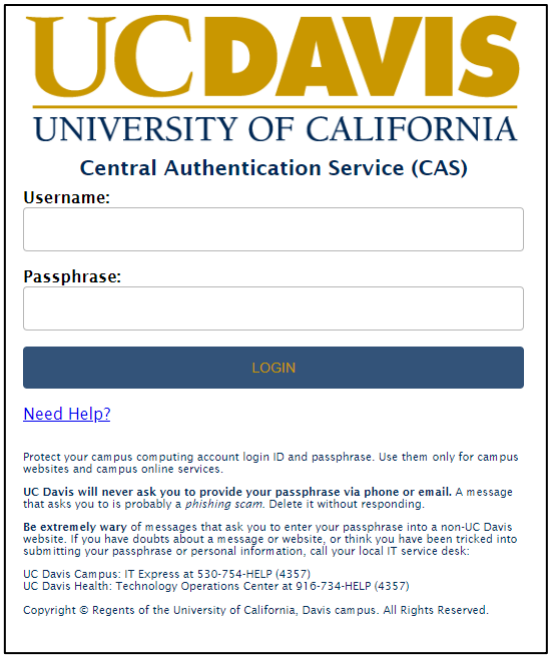
Step 2	Select the checkboxes for the **Tasks** you want to complete 
Step 3	Select **Complete** 

Creating a Product Request (Ordering Materials Not Commonly Stocked by Location 3)

In this section you will learn how to create a **Product Request** for materials needed to complete your **Work Tasks**. You will use this process **ONLY** to order supplies not commonly stocked by **Location 3**. The process for ordering materials commonly stocked by **Location 3** does not change with the implementation of **TRIRIGA**.

Step 1

Sign into TRIRIGA using the appropriate login credentials.



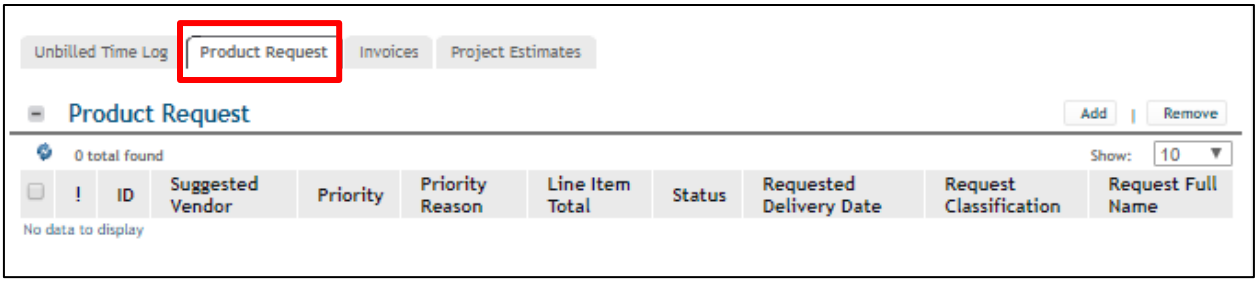
Step 2

Open the task you wish to request products or service for. Find the product request tab.

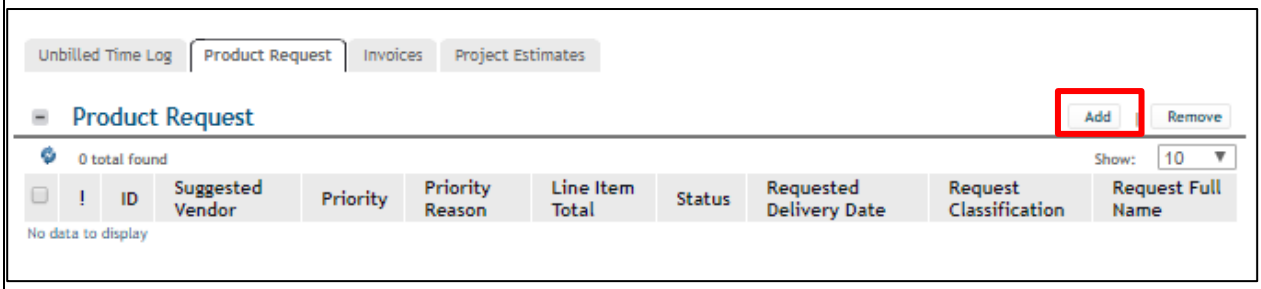
Step 3

To create a **Product Request**

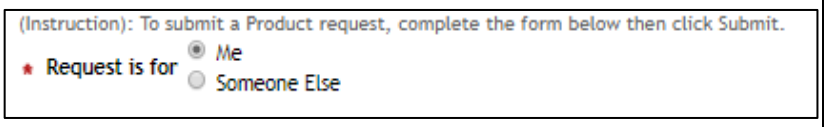
1. Select **Product Request**



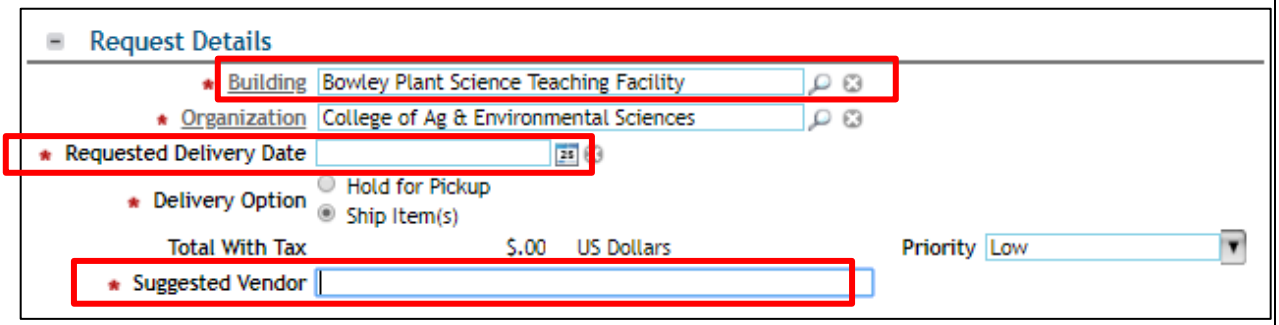
2. Select **Add**



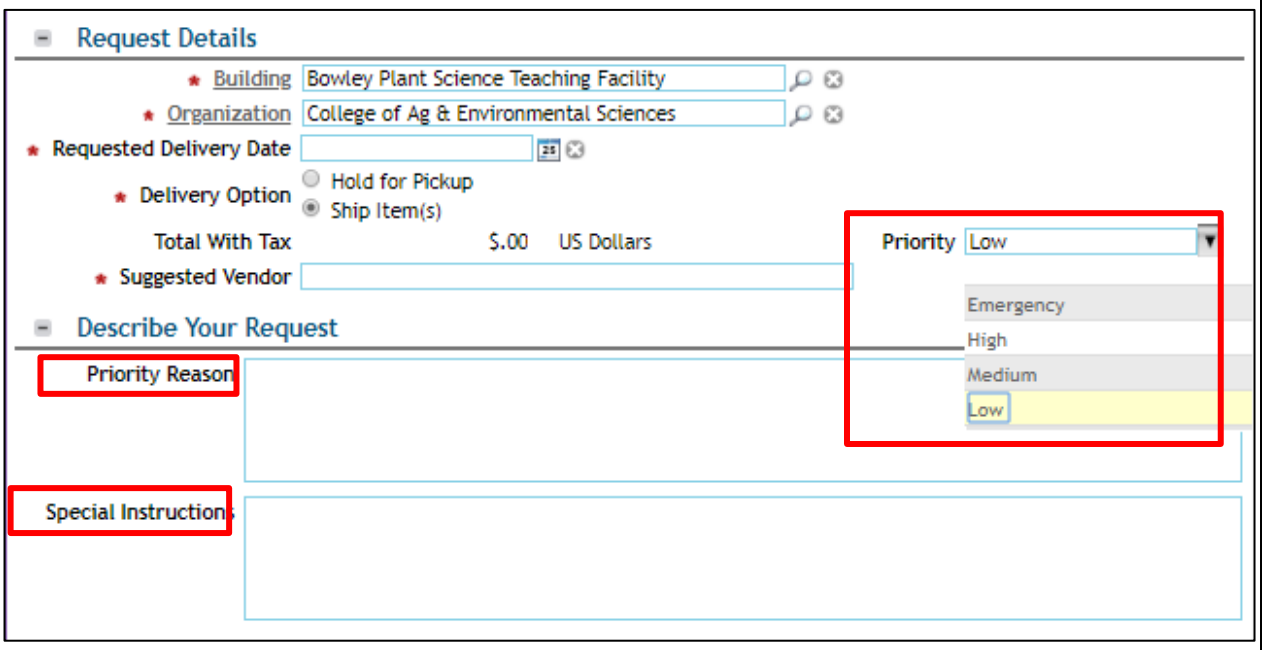
3. A new window will pop up for the Product Request
4. In General section, select the following
   - **Request is for:** Me



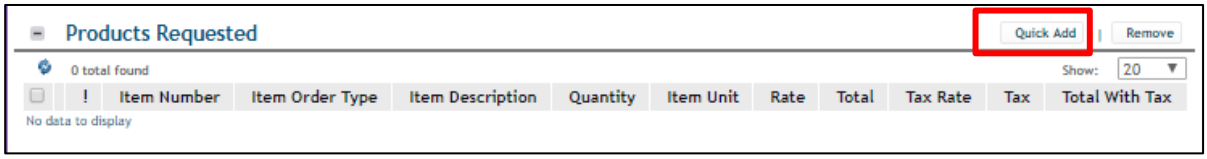
5. In Request Details section, enter the following:
   - **Building:** Defaults to Primary location of the task.
   - **Requested Delivery Date:** Enter the requested date for delivery
   - **Suggested Vendor:** Enter the Vendor you would like these items purchased from.
     *Note: Only one vendor can be selected per product request.



6. Enter your Priority from the pick list
7. Enter your Priority Reason in the open text box
8. Enter any special instructions in the open text box.

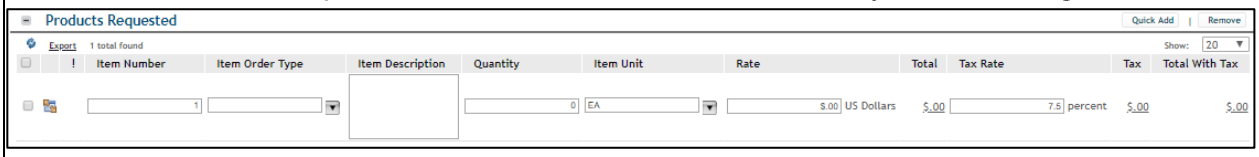


9. Scroll down to the Products Requested section and click Quick Add.

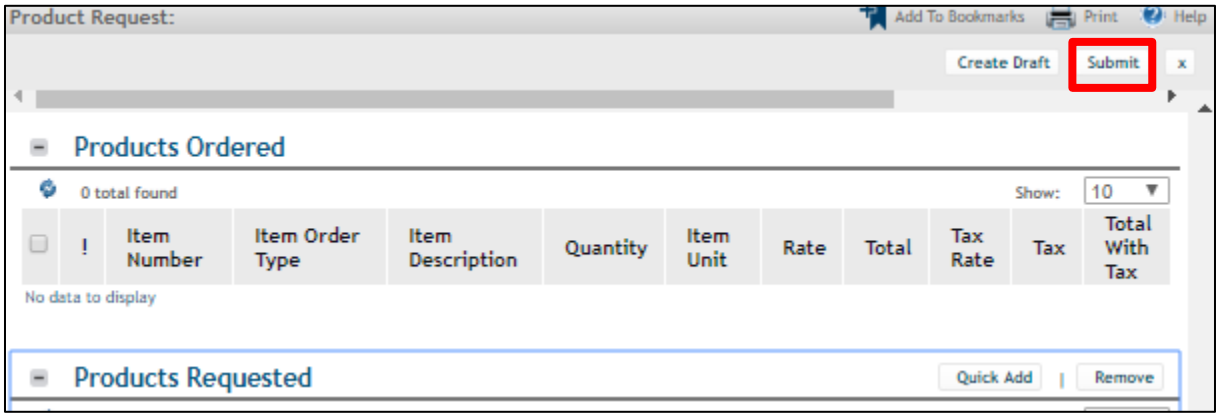
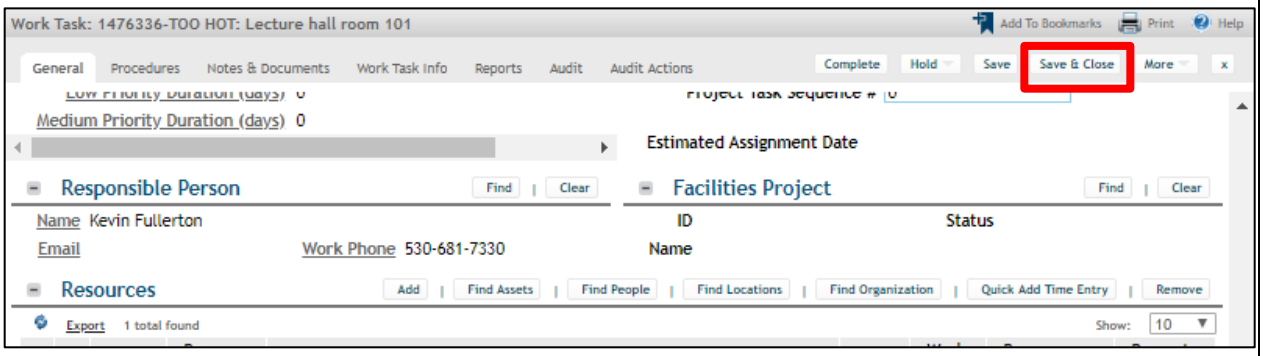


10. Under Products Requested enter the following:

- **Item Order Type:** Select Materials or Services from the drop down
- **Item description:** Describe the item requested
- **Quantity:** Enter how many are needed
- **Unit of Measure:** Select from the drop-down list
- **Rate:** Enter the cost per unit
- **Tax Rate:** This portion auto-defaults to 7.5%, however you can change if needed



11. You can click Quick Add to add as many items as you need

Step 4	**Submit** your product request: 1. Click the submit button. The screen will close and you will be back on the task page. Your product request is now submitted for processing.  2. Save and Close the work task when you are done.  3. You should receive an email from the system once your request is submitted.