Facilities and Services Information Management

Tririga How-To: Assign People

Assign People Locations and Contacts using the Space Form, Space Manager, and Department Form

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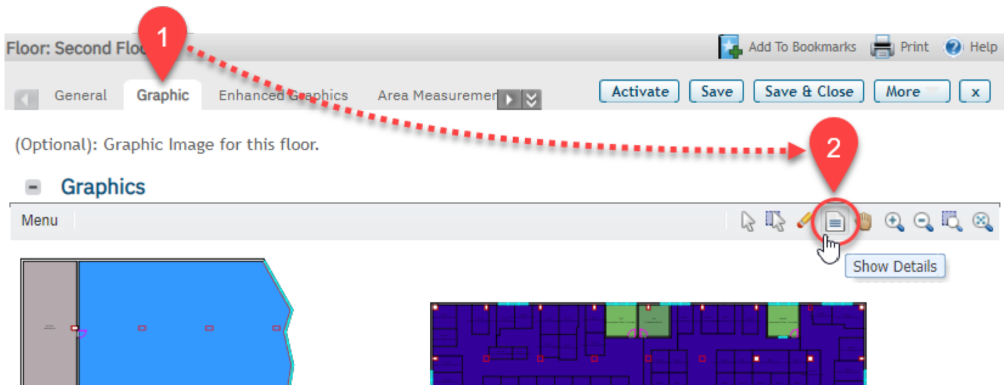
Belles, Kirk

Contents

Introduction

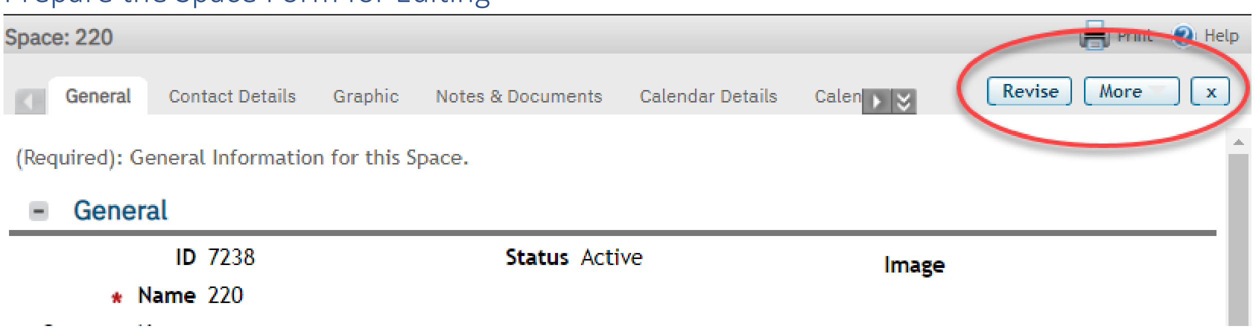
Finding the Space Form

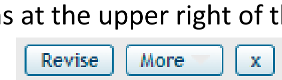
- From Portfolio - Use the left sidebar menu: Portfolio > Locations > Spaces.
- From Tables and Lists - Space forms can be accessed through most tables that have hyperlinked (underlined) rooms or spaces.
- From the Floor Plan Viewer – Show Details



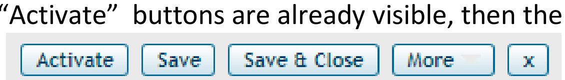
(1) Use the sidebar menu, and go to Portfolio > Locations > Floors > **Graphic** tab
(2) On the Floor Plan Viewer, choose the **Show Details** icon to the upper right of the floor plan.

Prepare the Space Form for Editing



(1) If you see the “Revise” buttons at the upper right of the Space Form, then the record is in “Active” status and is locked. 

Press the **Revise** button to edit the record. The “Activate” buttons will appear.

(2) If the “Activate” buttons are already visible, then the record status is “Draft” and is ready to edit: 

Automated Clean-up When an Appointment Ends

If a person's appointment has ended, their Primary and Secondary Location assignment(s) will automatically be deleted from the system. Department, Building, and Cluster Responsible Person contacts will remain, and must be removed manually.

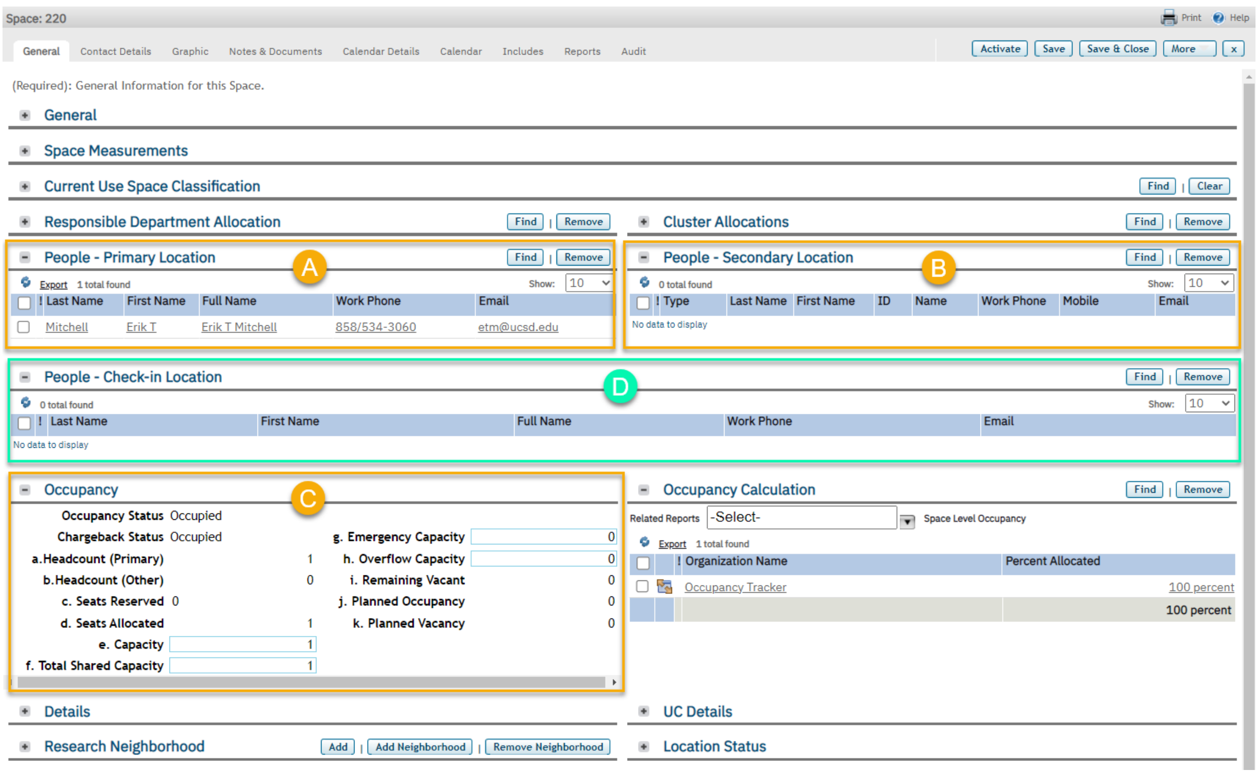
Overview - Workpoint Location and Occupancy

Workpoints and Locations

Workpoints are spaces assigned to individuals and are intended for regular occupancy or use (i.e. offices, cubicles) and count towards a department's vacancy report. Non-workpoints are spaces that are intended for specific task use (labs, conference rooms, mechanical rooms, special class labs) and do not count towards a department's vacancy report. (Capacity for non-workpoints is set at and should remain at 0, even though individuals can be assigned to the room as primary/secondary locations).

For PI/Cluster information, use the Cluster Allocations section next to Responsible Department Allocation section (or use the Cluster actions in the Space Manager). DO NOT use Primary, Secondary or Check-in Locations to indicate a PI/Cluster presence.

Below are instructions for editing the four areas related to assigning people to on-campus locations (Primary Location (A) Secondary Location (B), Occupancy (C), and Check-in Location (D)).



When working with Locations (A, B), remember to review Occupancy (C).

People Data - Sources

People data is primarily pulled in from the Employee Activity Hub (UC Path), Student Activity Hub (SAH), and the Affiliates Table.

Remote Locations

A person's **Remote Location** Is not captured in Tririga at this time. 100% Remote people will be flagged as a part of phase 2 AB119/Tririga development. Completion is anticipated in March 2023.

Space Form - Assign or Unassign Individual People to Locations

Use Primary and Secondary Locations for Occupancy Calculations. Use Check-in Location for field workers, or those with constantly changing or on-demand work at a variety of locations.

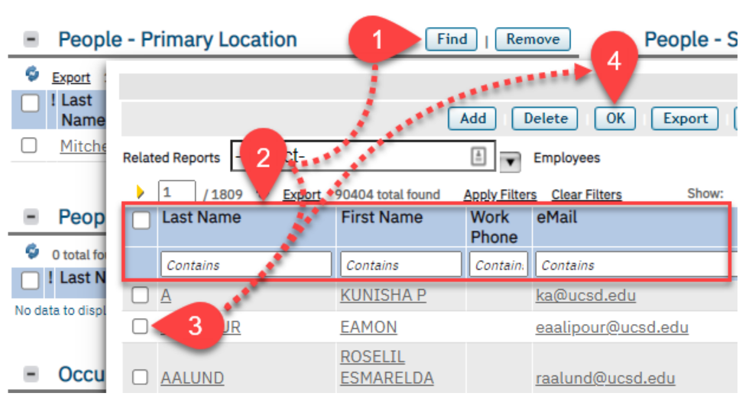
People – Primary Location

All people in Tririga are allowed only one Primary Location, usually an office workpoint assigned by the person's primary or 'home' department (but can be a non-office or non-workpoint space if no office is assigned). The Primary Location people count against occupancy calculations when it is a workpoint. *DO NOT use Primary Location to indicate a PI/Cluster presence.*

To preserve the rule of only one Primary location per individual, when you assign a person with an already existing Primary Location to a new Primary Location, it will remove them from the older Primary Location automatically. If this is a concern for you, use the Space Manager and check the **Display Floor Plan for Current Assigned Space** checkbox in the "Select an Action" section to display the current Primary Location for the selected person.

To add people to a Primary Location:

(1) Select Find . Search by the "preferred name" if a person has one. If a user doesn't have a designated preferred name it will be their full legal name.
(2) Filter and for the appropriate person. (If you have trouble locating the person, try filtering on the person's email address).
(3) Check the radio button in front of your selected person, then…
(4) Select OK



When finished, click either Save Save & Close on the Space Form.

People – Secondary Location

All people in Tririga may have any number of Secondary Locations. They are used for subsequent designated locations after the Primary Work Location is identified. These additional seat assignments are usually based on a situational use such as a secondary appointment or project. The Secondary Location people count against occupancy calculations when it is a workpoint. *DO NOT use Secondary Location to indicate PI/Cluster presence.*

To add People to a Secondary Location, follow the **People - Primary Location** assignment process above, but perform it in in the Secondary Location section.

Occupancy

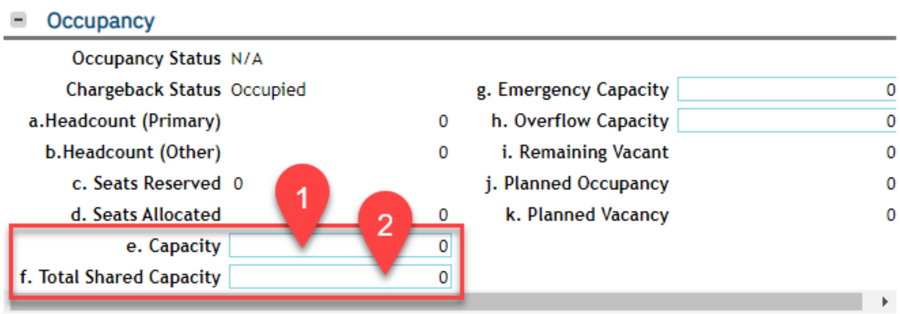
This section must be reviewed in conjunction with Primary and Secondary assignments to be able to report on workpoint (office) occupancy and vacancy.

Occupancy Calculation

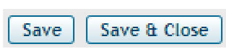
Capacity headcount (HC) analysis uses the Primary and Secondary Location occupants and applies to “Workpoint” spaces that are intended for regular assigned occupancy/use (i.e. Offices, Cubicles) and count towards a department’s vacancy report (graphic reports available in floor plan viewer, People theme). Check-in HC is excluded from Occupancy Calculation.

Edit Occupancy Calculation Fields

Capacity and Total Shared Capacity must be more then 1 for workpoints (offices), and are used to calculate occupancy and vacancy when the space is a workpoint.



(1) Adjust **e. Capacity -** how many individuals can routinely occupy the space at the same time. Capacity for non-workpoints is set at and should remain at 0, even though individuals can be assigned to the room as primary/secondary locations.
(2) Adjust **f. Total Shared Capacity** - how many individuals can be assigned to share the space while not exceeding the intended capacity at any one time*.

Then click either 

at the upper right corner of the form to finish.

**For example, a grad student office may have a capacity of 4 (4 desks), but can have a total shared capacity of 8 (8 people share the room, but only 4 can occupy at any given time).*

Edit Other Optional Occupancy Fields

These Occupancy fields are not calculated against Primary and Secondary Location headcounts.

g. Emergency Capacity is the stated maximum occupancy of the room, if known (often set by the Fire Marshal or other building official). This field is not required.

h. Overflow Capacity is how many additional individuals can be assigned to the space in an overflow situation. This field is not required.

People – Check-in Location

The **Check-in Location** section is for people who do not perform a significant concentration of work in a designated space in a building. This could be due to work performed in the field, or constantly changing on-demand work at a variety of locations. The check-in location is where a supervisor or other contact could enable someone to get in touch with the person, or where staff report but not where they perform the majority of their work. The Check-in Location people are excluded from occupancy calculations.

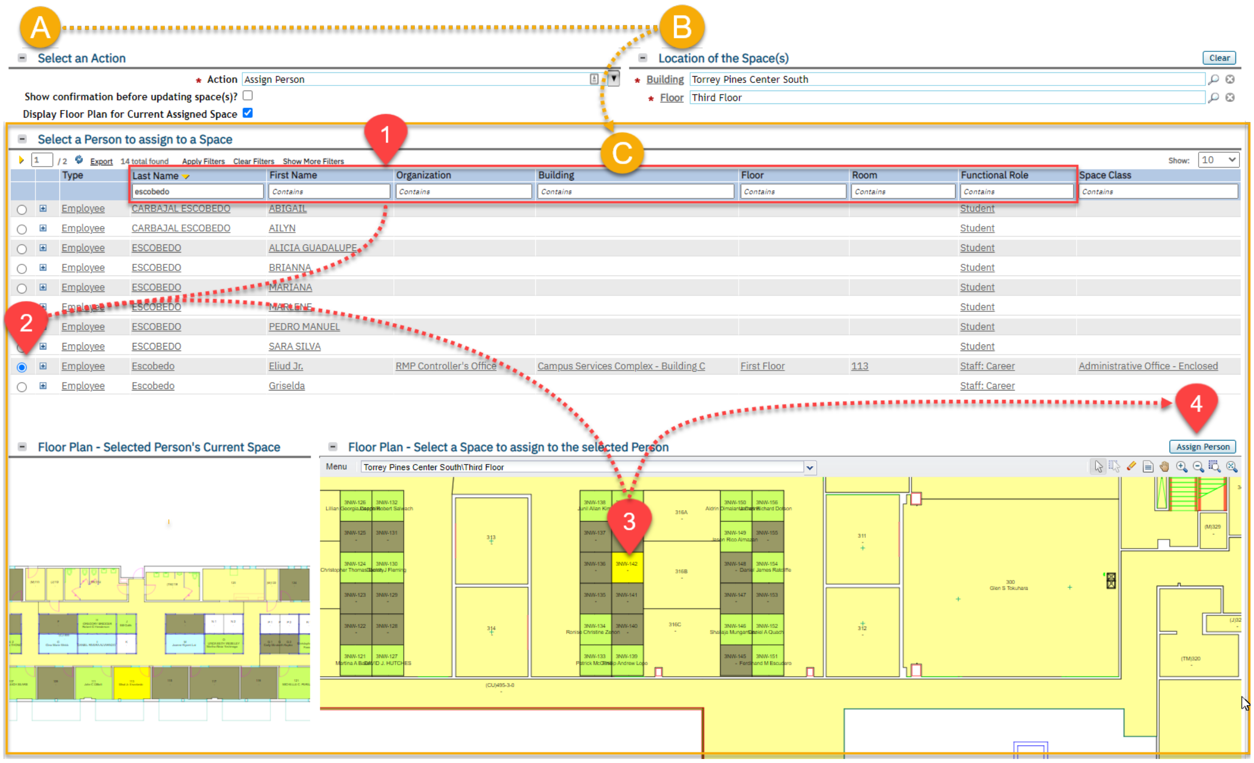
DO NOT use Check-in Location to indicate a PI/Cluster presence.

To add people to check-in, follow the **People - Primary Location** assignment process above, but in the Check-in Location section.

Space Manager - Assign People

For Primary Location assignment only. *Space Manager currently does not work for Secondary or Check-In Locations. People are assigned one at a time.*

Navigate to the **Space Manager**, and prepare the Space Manager to assign people.



A) Choose Space Manager Action

In the **Select an Action** section, under **Action**, choose **Assign Person**.

B) Choose Location

In the **Location of the Space(s)**, choose the building and floor.

C) Assign Person

(1) Filter on the chosen terms to limit your choices below the 80,000+ people in the Employee Activity Hub. Filter options include Name and Functional Role (from UC Path)

(2) Check the boxes in front of the person to assign.

(3) Select the designated space in the floor plan.

(4) Click Assign Person to the right to assign the person. Repeat as needed.

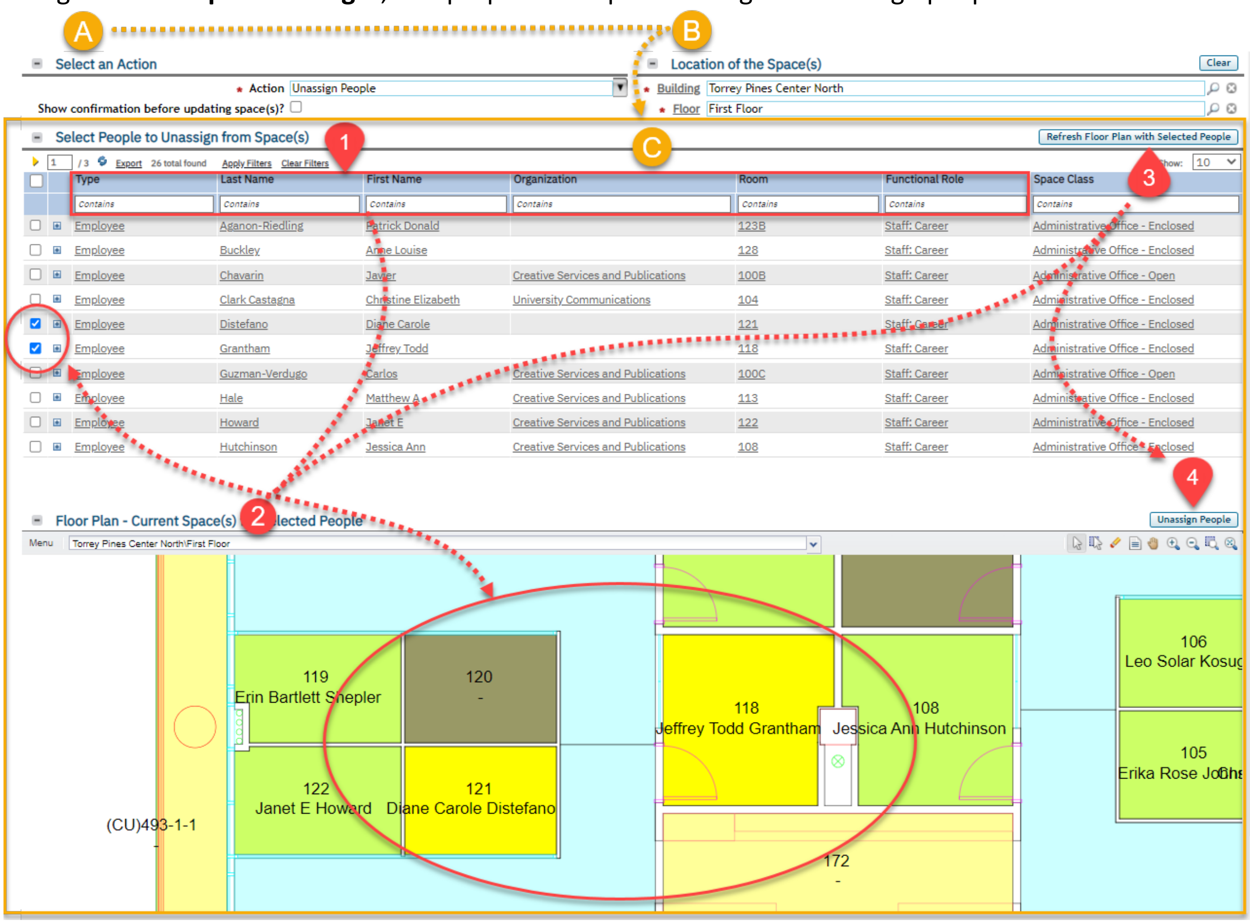
To preserve the rule of only one Primary location per individual, when you assign a person with an already existing Primary Location to a new Primary Location, it will remove them from the older Primary Location automatically. If this is a concern for you, check the **Display Floor Plan for Current Assigned Space** checkbox in the “Select an Action” section to display the current Primary Location for the selected person.

NOTE: Spaces also may be individually edited by using Show Details and clicking a space.

Space Manager - Unassign People

For Primary Location un-assignment only. *Space Manager currently does not work for Secondary or Check-In Locations. Several people may be unassigned at once.*

Navigate to the **Space Manager**, and prepare the Space Manager to unassign people.



A) Choose Space Manager Action

In the **Select an Action** section, under **Action**, choose **Unassign People**.

B) Choose Location

In the **Location of the Space(s)**, choose the building and floor.

C) Unassign Person

(1) Filter on the chosen terms to limit your choices below the 80,000+ people in the Employee Activity Hub. (Filter options include Name and Functional Role from UC Path)

(2) Designate people **OR** locations to unassign

a. People - check the boxes in front of the person(s)

b. Location - select the designated space(s) in the floor plan.

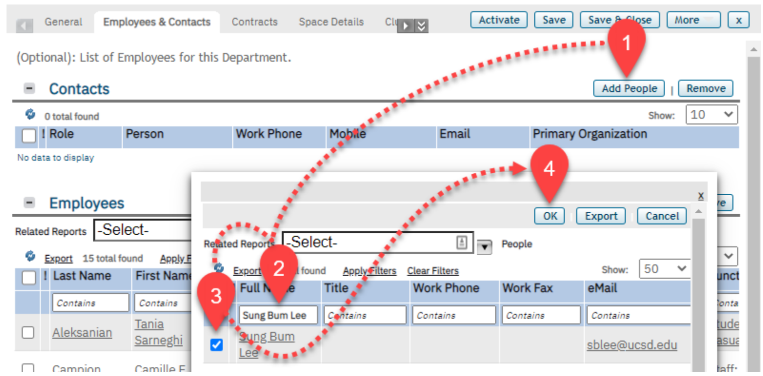
(3) To highlight checkbox choices (2a) on the floor plan, select Refresh Floor Plan with Selected People to the upper right of the person list.

(4) Click Unassign People to the upper right right of the floor plan, to finish.

Assign Department Contacts and Roles

Use the sidebar menu: Portfolio > Organizations > Departments > [select department] > **Employees and Contacts** tab.

Add a Department Contact



(1) Choose Add People to the right.

(2) Filter for the contact. If it is a common name, filter on the eMail field.

(3) Check the box in front of the name

(4) Click OK

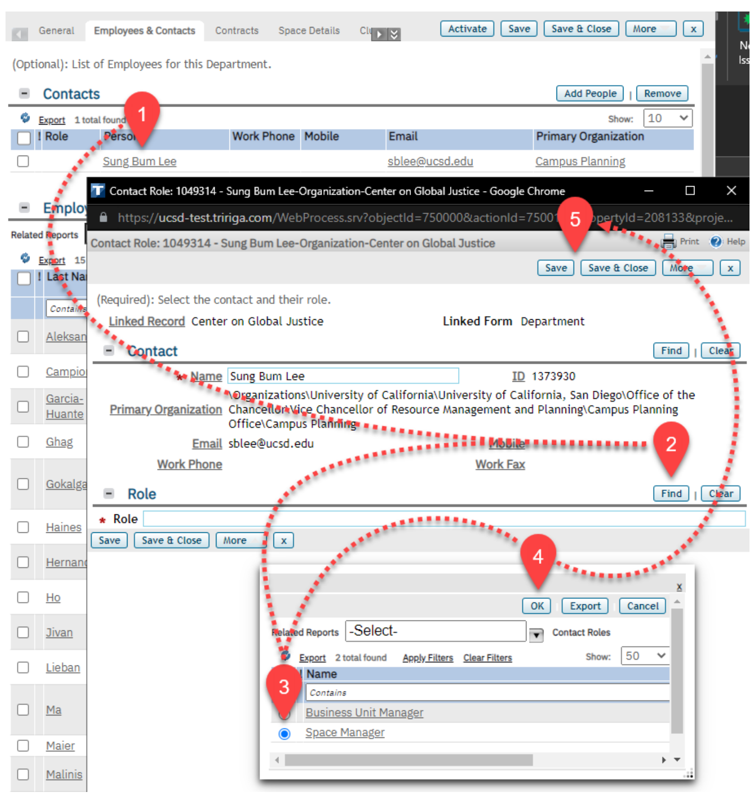
Add a Role to a Contact

Department **Roles** are assigned to the department, and people are assigned to Roles. An individual may occupy more than one Role. Available roles include:

- Business Unit Manager – Must have one. Only one allowed per department
- Space Manager – Must have one. May have several for a department
- HR Contact – Not required.

More roles can be created on request Have your VC space management team contact FSIM.

To add a Role:



(1) Click on the person that needs a role assigned.

(2) In the Contact Role popup, choose Find in the Role section

(3) Check the box in front of the desired contact role.

(4) Click OK

(5) Click either to finish

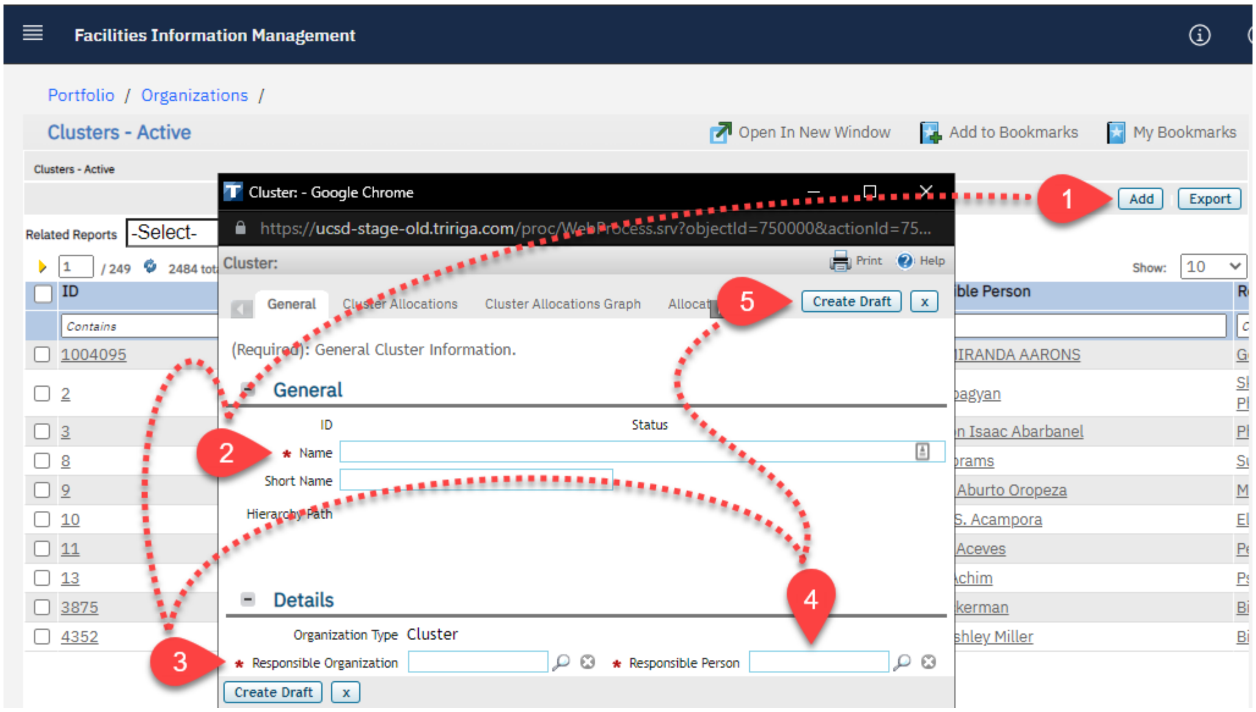
Save Save & Close

Creating and Editing Clusters

Clusters are sub-department groups of people, space, funding, and research activity that may cross departmental boundaries. As noted above, PI/Cluster presence should be identified using Cluster Allocations. DO NOT use Primary and Secondary Location workpoints to indicate a PI/Cluster presence.

Create and Assign a Responsible Person to a Cluster

Use the sidebar menu: Portfolio > Organizations > Clusters > **General** tab:



(1) Add a Cluster.
(2) Create a unique name.*
(3) Add a Responsible Organization (magnifying glass, search and filter for the department name, choose by selecting checkbox in front, then OK).
(4) Add a Responsible Person, using the same methods as for assigning a Primary Location for a person. (magnifying glass, search and filter for person, choose by selecting the checkbox in front of the name, then OK).

Once a draft is created, open it and choose either Save Save & Close to complete the new Cluster.

* NOTE: Research Clusters names should be LAST NAME, FIRST in all-caps, and add a clarifying suffix to all identical names if they need to point to distinctly different activities. Clusters may also denote grouped activity other than research-focused and -funded efforts.

Edit a Cluster's Responsible Person

(1) Within the Cluster Form under **Responsible Person**, click on the magnifying glass, search and filter for the person, choose by selecting the checkbox in front of the name, then OK

Finish by choosing either Save Save & Close on the Cluster Form.