IBM TRIRIGA
Version 10 Release 5.2

*Portfolio Management
User Guide*

IBM

This edition applies to version 10, release 5, modification 2 of IBM TRIRIGA and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

Chapter 1. Managing portfolio data

Before you begin working with the IBM® TRIRIGA® applications to manage your workplace, you plan and set up your portfolio and create portfolio data.

Chapter 2. Portfolio data overview

Portfolio data is the core information that you use to manage workplaces. Your portfolio consists of information about the organizations, locations, people, and assets that are associated with the space you manage.

You use portfolio data records, in the IBM TRIRIGA Portfolio Data Manager, to track the details that are necessary for you to complete tasks in other areas of the IBM TRIRIGA. For example, if you are planning space allocation or moving people to new locations, you need comprehensive information about the spaces and people involved.

Portfolio data records are organized in a hierarchical structure and can be associated with other records. All lifecycle events that are associated with a record can be tracked so that you have a complete history and audit trail.

IBM TRIRIGA Real Estate Environmental Sustainability adds portfolio sections and features related to My Company, Building, Land, Structure, and Retail Location business objects. See the IBM TRIRIGA Real Estate Environmental Sustainability topics for more information about how to collect, analyze, and use environmental data to achieve sustainability goals.

Portfolio record states and actions

All records in the IBM TRIRIGA Portfolio Data Manager follow the same set of states and actions. States are the major steps in the lifecycle of the record and the actions trigger state changes.

Figure 1. Portfolio record states and actions
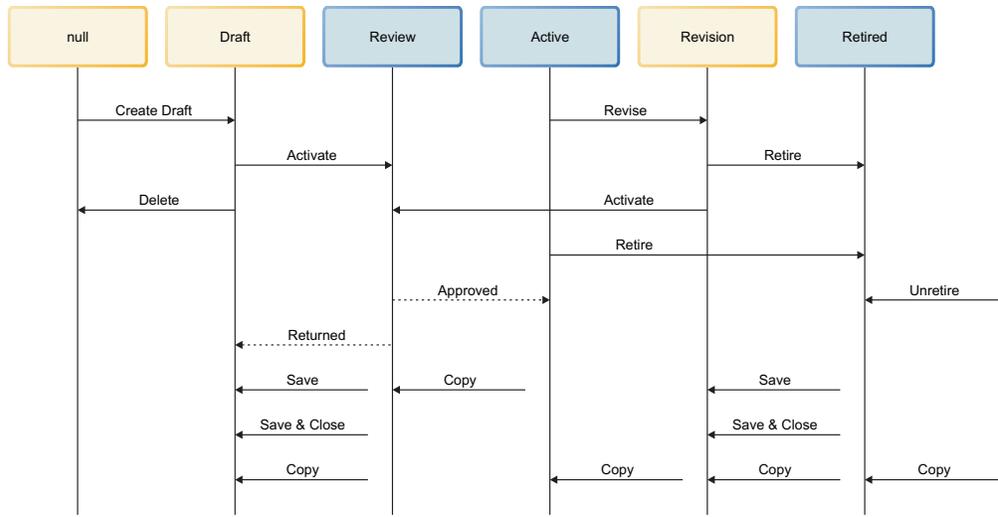
State where data is read-only

State where data is editable

→ Action and the transaction direction

Chapter 3. Setting up your portfolio

Before you begin creating portfolio data, you must set up the portfolio so that you can use the lists, classifications, geographies, and specifications that are necessary to manage your data.

Setting up specifications

You set up specifications to help you manage information about your assets.

Specifications overview

Specifications represent a description of an item, but not an actual item. They function as the inventory lists that each asset is a part of and they define the common elements that make the assets unique.

While assets are the actual owned or leased items, they are associated with specifications that are used to group and categorize the assets. A wide variety of information about assets can be identified in the specifications, such as measurements, energy ratings, cost data, performance details. This categorization simplifies the management of assets. For example, if a piece of equipment such as printer breaks down, you can use its specification to find the necessary part to fix it.

Specification classification

Depending on your business requirements, you might add fields to the specification classification.

Units and cost

When you create a specification, you enter the appropriate unit of measure. For example, if the specification describes desks, this value might be Quantity. You also enter the usage cost for the specification (for example: $10 per day). The system uses this cost in the IBM TRIRIGA Workplace Reservation Manager application. It is multiplied by the duration of the reservation to determine the usage chargeback for the asset. If you do not charge for reserved assets, or are not using the IBM TRIRIGA Workplace Reservation Manager application, you enter the number 0.

Entitlements

Entitlements define the roles for people who are entitled to view and request an item. Employee records define the functional role with values such as Staff, Manager, Director, or Vice President. These values are defined to match your company's business nomenclature. In the **Entitlements** section, find and view the list of available roles that limit the specifications that are available for selection. For example, it might be defined that only people in the organization with a role of Staff, Manager, or Director are able to view and select the Desk Chair. Executives and Vice Presidents might have a different grade of Desk Chair, so you would create another specification for the Executive/VP Desk Chair and select those roles as the entitlement.

Inventory

When you create a specification, you can enter inventory information that is carried over to inventory records. Adding inventory information simplifies the creation of an inventory item and provides consistency across the company.

The IBM TRIRIGA applications ensure consistency across Units of Measure (UOM) by pointing all fields on an object to a common UOM field. For example: On the Specification record, all Currency fields can be in US Dollars, and all Item Unit fields can be in a Quantity value of Each (to measure the quantity of US dollars).

The Inventory Valuation Method Class is tied to business logic that recalculates the Specification Item Material Cost as Purchase Orders for specifications that are completed. If Average is used, then Item Material Cost = Average Cost of purchased items. If FIFO (First In First Out) is used, then Item Material Cost = Cost of first purchased item. If LIFO (Last In First Out) is used, then Item Material Cost = Cost of last purchased item.

For more information, see the *IBM TRIRIGA 10 Inventory Management User Guide*

Space standard specification

You can use the space standard specification to define your corporate space standards, such as those for Manager's Office, Staff Office, Manager Workstation, Staff Workstation, Small Conference Room, and Large Conference Room.

You can define entitlements for a space standard specification to define the roles for people who are entitled to view and request an item. For example, you might define a space standard specification for Manager Office and select the entitlement role of Manager. You also might define a space standard specification for Staff Office and select the entitlement role of Staff.

The space standard specification is similar to a space classification. A space classification typically is more generalized and a space standard classification is typically more specific and defines how the space is outfitted or furnished. It also defines other entitlements that are associated with the functional roles of people that are expected to occupy the space.

After you define your space standards, you can associate those standards to space records. A space record can be associated with one or more space standards. You use the space standard specification and entitlements to restrict the users who can view and select spaces when they complete processes such as space moves.

Creating specifications

You create specifications to provide information that describes the assets that you manage.

About this task

When you create specifications, enter information that will help you to categorize and manage your assets.

Procedure

1. Select **Portfolio** > **Set Up** > **Specifications** and select the type of specification that you are creating.

2. Click **Add**.
3. On the **General** tab, specify a name for the specification.
4. Select the specification class. This field is used to further classify the specification type. For example, you can note that a Furniture Spec is in the Tables and Desks Class.
5. Select the service class. This field is used to group like specifications.
6. Specify other details about the specification as appropriate. To ensure that images are displayed properly in query results, tt is recommended that you do not upload image files that are larger than 2MB.
7. Click **Create Draft**.
8. Save the specification record.

What to do next

You can proceed to enter more details about the specification on the various tabs and you can activate or save and close the specification.

Setting up geographic information

You set up geographic information to represent the places where your organizations are located.

Geography overview

You use geographic information to represent the places where you manage organizations. Geography records represent a place on a map.

Generally, organizations are spread across multiple geographic areas or around the globe. To effectively manage these organizations, you must also manage the geographical areas. With the geography feature in IBM TRIRIGA, you can track and manage the various geographic areas where your company, facilities, and resources are located. You can enter information to link the geography record to a geographic information system (GIS).

You can build a hierarchical structure of geographic areas. Your hierarchy can include a combination of world region, country, state, region, metropolitan area, county, and city. You can build a hierarchy with as many layers or levels as you need.
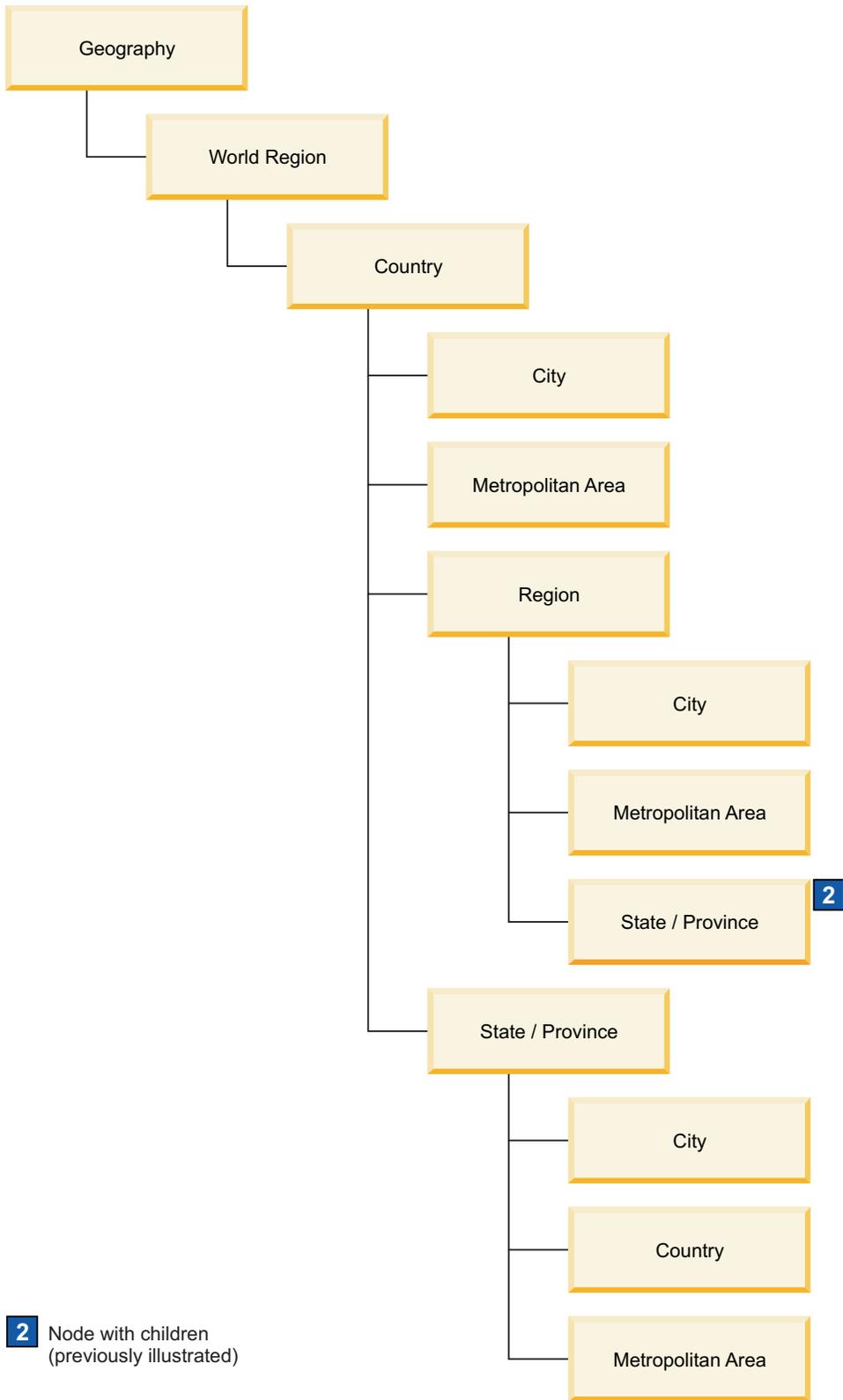
Figure 2. Geography hierarchy example

Creating geography records

You create geography records to represent the places where your organizations are located. You specify information to help you manage your business in those geographic areas.

About this task

The type of information that you specify when you create geography records varies depending on the type of geography record that you are creating.

Procedure

1. Select **Portfolio** > **Geography**.
2. In the hierarchy, click **Geography**.
3. Click **New** and select the type of geography record that you are creating. For example, enter the city name if you are creating a city record.
4. On the General tab, specify a name for the geographic area.
5. Enter an ID for the geography record. If you do not specify an ID, a unique ID is generated when the geography record is saved or activated.
6. Specify other details about the geographic area as appropriate. To ensure that images are displayed properly in query results, tt is recommended that you do not upload image files that are larger than 2MB.
7. Click **Create Draft**.
8. Save the geography record.

What to do next

You can proceed to enter more details about the geographic area on the **General** tab and on the other tabs, and you can activate or save and close the location. You can add more geography records to the hierarchy and then you can proceed to set up the portfolio data for these geographic areas.

Chapter 4. Managing your portfolio data

After you set up your portfolio, you can begin to create portfolio data, including organizations, locations, people, and assets.

Chapter 5. Managing organizations

You set up organization information so that users can use the details to manage assets and other resources at locations within those organizations.

Organizations overview

Organizations are used to define the hierarchical structure of your company. Organizations can also represent external companies that you do business with, such as vendors, co-tenants, partners, and customers.

Organizations are parents to locations, which have people who use the assets that you manage. You use the organization data when you complete various processes in IBM TRIRIGA, such as allocating space, managing moves, and managing leases and contracts.

The organization structure is hierarchical. You set up your organizations based on their relationships with each other. You can add as many divisions and departments as necessary to represent the structure of the organization. For example, you can model your organization tree after your corporate human resources system.

Hierarchical relationships can be recursive. For example, divisions can have child divisions and departments can have child departments. You can build a hierarchy with as many layers or levels as you need.
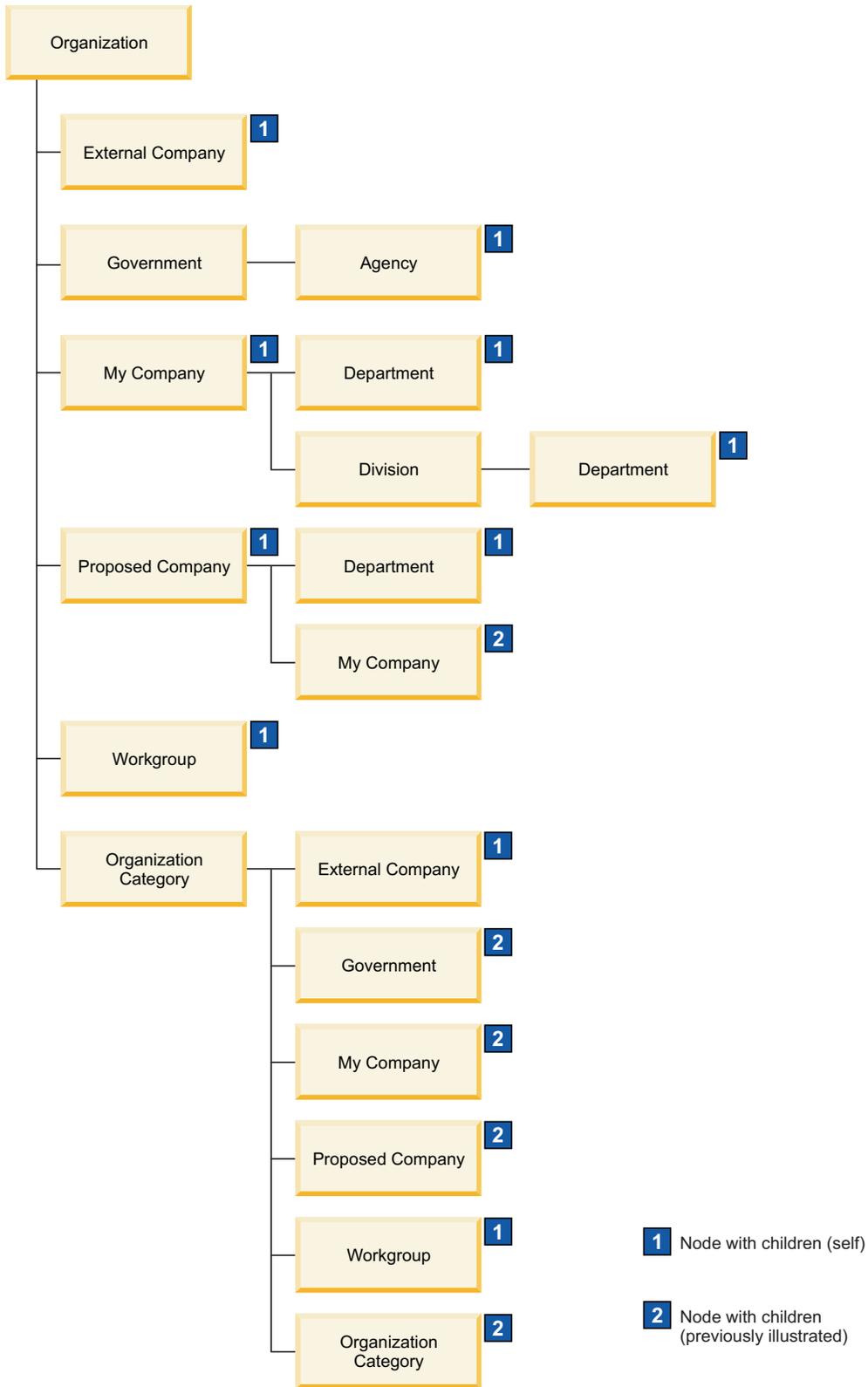
Figure 3. Organization hierarchy example

Contact roles

A role-based system is used for managing contacts. You can designate the role of the contact, such as Manager, Primary Contact, or Human Resources, and select the person who is filling that role. Approvals and notifications can be based on the contact role for a record. If the person who is filling the role changes, the replacement person receives the notifications. For example, when the status of an organization changes, you might want to notify the Human Resources contact. Whoever is filling that role at the time of the change is sent the notification.

Space details

Adjacency requirements enable you to define the space planning relationship between two organizations.

With space level allocations, you can define the areas or spaces that organizations use or manage, for use analysis and charge back purposes. When an organization is associated to a space with a type of Charged To, an active Space Level Allocation record is created. When you remove the association, the system maintains the record for historical and reporting purposes but moves it to a retired status.

Environmental details

You can record environmental data at the organization level or at the location level. The environmental information is used by the application.

Creating organizations

You create organizations to represent the hierarchical structure of your business. You specify information to help you manage day-to-day tasks and processes that are related to the organizations.

About this task

The type of information that you specify when you create organizations varies depending on the type of organization that you are creating. For example, you might enter retail information for an external company and employee information for a department or division.

Procedure

1. Select **Portfolio** > **Organizations**.
2. In the hierarchy, click **Organizations**.
3. Click **New** and select the type of organization that you are creating.
4. On the General tab, specify a name for the organization.
5. Enter an ID for the organization. If you do not specify an ID, a unique ID is generated when the organization is saved or activated.
6. Associate the organization with a geography.
7. Specify other details about the organization as appropriate. To ensure that images are displayed properly in query results, tt is recommended that you do not upload image files that are larger than 2MB.
8. Click **Create Draft**.
9. Save the organization.

What to do next

You can proceed to enter more details about the organization on the other tabs and you can activate or save and close the organization.

Chapter 6. Managing locations

You set up location information to help you track and manage the various locations that belong to, or are managed by, your organization or your organization's customers.

Locations overview

Locations are the places of business that belong to or are managed by your organization or your customer's organizations.

Locations include properties, land, buildings, structures, floors, spaces, retail centers, and retail locations that your organization uses or manages.

You use the location information when you complete various processes in IBM TRIRIGA, such as allocating space, managing moves, and managing leases and contracts. Any location can be made available to be reserved by selecting the **Reservable** field on the **General** tab for the location. Use the **Reserve** tab to set the reservation availability calendar and the cost and usage units details.

The location structure is hierarchical. You set up your locations based on their relationships with each other. You can build a hierarchy with as many layers or levels as you need in order to reflect the structure of your organization. For example, your organization might own property with multiple buildings. Those buildings might have multiple floors, and each of the floors might have multiple spaces.
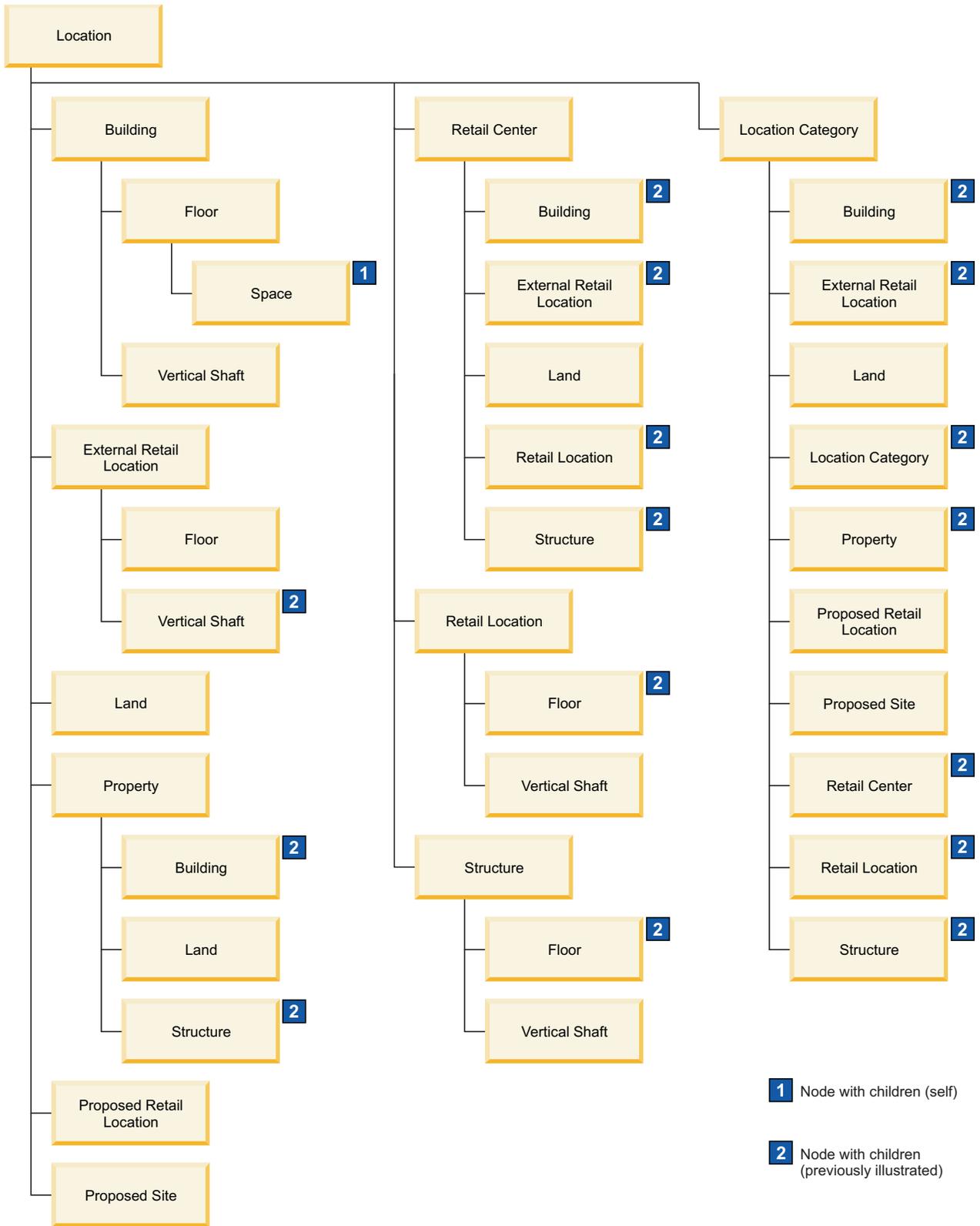
Figure 4. Location hierarchy example

Environmental details

You can record environmental data at the organization level or at the location level. The environmental information is used by the IBM TRIRIGA Real Estate Environmental Sustainability application.

Contact roles

A role-based system is used for managing contacts. You can designate the role of the contact, such as Manager, Primary Contact, or Human Resources, and select the person who is filling that role. Approvals and notifications can be based on the contact role for a record. If the person who is filling the role changes, the replacement person receives the notifications. For example, when the status of an organization changes, you might want to notify the Human Resources contact. Whoever is filling that role at the time of the change is sent the notification.

Facility assessment

The facility assessment process provides analysis of the existing and projected future condition of facilities and building systems and assets within those facilities. This process determines the immediate and long-term cost liabilities for the assessed building systems. It enables an organization to address operational requirements along with required funding requirements. As a result, buildings, structures, systems, and assets are maintained in a proactive manner. Property, land, building, structure, and asset records hold the primary Facility Assessment data.

For more information, see the *IBM TRIRIGA 10 Facility Assessment User Guide.*

Location status

You can view the status of a location in the **Location Status** section of the **General** tab. You can also change the location status by selecting a status action.

The fields and actions that are displayed in the Location Status section vary depending on the type of location and the status. You can view transaction logs on the **History** tab. Different colors, as defined in the Status classification, reflect the different status values.

When you create and activate a location, its status is Available. You use the **Resource Downtime** action to mark a location offline, for example, if it is closed for maintenance. The offline status is displayed on the location record.

Checklists

Checklists enable evaluating the current environmental and energy performance of facilities, monitoring the impact of planned and implemented improvements, and rating environmental and energy performance. These evaluations are done to help determine what improvements should be made to achieve a higher level of certification.

Checklists also are a way to verify that defined actions were taken. A checklist is composed of categories that group checklist items and give their score. Checklist items are the requirements. Checklists and checklist items can include the specific projects and tasks that are to be implemented to achieve the score for the checklist item.

Checklist templates, which are in **Tools** > **Application Setup**, facilitate the standardization and easy creation of checklists, checklist categories, and checklist items. If a checklist template is revised or retired, you can apply the same action to checklists that are based on the template.

Although Checklists are added from Building, Land, Retail Location, and Structure records, they are accessible from the menu bar. Select **Sustainability** > **Certifications**.

Location allocations

Space allocations and floor allocations provide information how space is used within your organization.

Space allocations

IBM TRIRIGA automates creating and retiring space use records, called space allocations. A space allocation record is created when an organization is associated with a space with the association type of Charged To. The space allocation record is retired when a corresponding organization is de-associated with the space. This can be done from the space record or within the IBM TRIRIGA CAD Integrator/Publisher. This allows you to manage your space use by adding and removing the organizations from the spaces. In a space record, this is done on the chargeback allocations. A history of all space allocations is maintained.

Floor allocations

Area overlays enable you to define the area of a floor, graphically or manually. Area overlays can be used to define areas of a floor, such as wing, ward, or zone, for floor-level charge back purposes.

An area-level allocation record is created when an organization is associated with an area overlay with the association type of Charged To. The area-level allocation record is retired when a corresponding organization is de-associated with the area overlay. This can be done from the floor record, or within the IBM TRIRIGA CAD Integrator/Publisher. This allows you to manage your space use by adding and removing the organizations from the area overlay records.

Space use classifications

You can configure how your space use classifications are set up.

The IBM TRIRIGA application is delivered with a default set of space use classifications that includes those supported by IFMA and BOMA 1996. You might want to alter these Classifications to better fit your industry or business and reporting needs. During planning and setup of your system, you should review the space classifications that are delivered with the product and modify the data as necessary to reflect your industry, market, or business and reporting needs. After your space use classifications are set up, they can be applied across your portfolio for consistency and standardization. Changing a designation can be done at the classification level and the change is reflected across the portfolio. For example, you might want to change a space classification from Floor Common to Building Common.

The Area, Gross Area, and Space Classification can be populated from the IBM TRIRIGA CAD Integrator/Publisher.

Creating locations

You create locations to represent the places of business that you own or operate or that your customers own or operate. You specify information to help you manage day-to-day tasks and processes that are related to those locations. If you use IBM TRIRIGA Connector for BIM or IBM TRIRIGA CAD Integrator/Publisher, you can create locations automatically.

About this task

The type of information that you specify when you create locations varies depending on the type of location you are creating. For example, you might enter cost information and environmental details for a building, and floor measurements for a floor.

Procedure

1. Select **Portfolio** > **Locations**.
2. In the hierarchy, click **Locations**.
3. Click **New** and select the type of location that you are creating.
4. On the General tab, specify a name for the location.
5. Enter an ID for the location. If you do not specify an ID, a unique ID is generated when the location is saved or activated.
6. Associate the location with a geography.
7. In the **Location Status** section, specify the in-service date for the location. The in-service date is usually the date the location was constructed or renovated.
8. Specify other details about the location as appropriate. To ensure that images are displayed properly in query results, tt is recommended that you do not upload image files that are larger than 2MB.
9. Click **Create Draft**.
10. Save the location.

What to do next

You can proceed to enter more details about the location on the other tabs and you can activate or save and close the location.

Retiring locations

If a location is not longer in use, you can retire it. When you retire a location, you must complete disposition information for audit purposes.

About this task

You manually can remove the associations between the retired location and people, assets, and organizations, or you can specify that associations are removed when the retire action is approved. The location is updated so that the carbon emission value is 0 if the entire location is retired. When a floor is retired, the carbon emission value is recalculated when the next carbon footprint calculator runs. You can retire multiple locations at one time by completing a Disposition Request from the **Requests** tab.

Procedure

1. In the portfolio, find and open the location that you are retiring.
2. Select the **Retire** action.
3. Complete the details on the disposition form. Select the **Auto Cleanup** options if you want the associations between the locations and assets, people, and organizations to be removed automatically.
4. Click **Create**.

What to do next

If you did not select the **Auto Cleanup** options, the retired location, including floors and spaces, remains associated to any assigned assets, people, and organizations. You must manually remove these associations.

Chapter 7. Managing people

You set up people information so that users can manage assets and other resources that those people use within organizations.

People overview

People are resources that are managed in relation to their space and asset allocations. People can include employees, consultants, and external contacts such as vendors and suppliers.

With people records, you can track and monitor resources. You assign people to organizations and spaces and you can associate assets with the people. You use the information about people when you complete processes such as managing spaces and moves. You might, for example, have a list of all of the employees in a particular building. You can track details about work location, project allocation, and assets that are assigned to employees. As well, you can manage a person's work schedule or availability.

In order for a person to gain access to the IBM TRIRIGA applications, that person must also be a valid user in the system. You define the person as an IBM TRIRIGA user in their Employee, Consultant, or External Contact record. All active users have a **My Profile** record that can be accessed from the user's portal home page. The **My Profile** record allows each user to personalize aspects of the system such as the formatting of date and time fields, the default time zone and currency, display colors for graphs, notification preferences, and reservation preferences. Changes to fields that are common between a user's My Profile record and the user's Employee, Consultant, or External Contact record become synchronized.

Creating people records

You create people records to track and manage employees, contractors, and external contacts such as vendors or suppliers. You specify information to help you manage day-to-day tasks and processes that are related to those people.

About this task

The type of information that you specify when you create people records varies depending on the type of people record that you are creating. For example, you might enter information about who an employee reports to, but you would not need that information for an external contact.

Procedure

1. Select **Portfolio** > **People** and then select the type of people record that you are creating.
2. Click **Add**.
3. On the General tab, specify the name of the person.
4. Associate the person with an organization. A person can have only one primary organization but can belong to multiple work groups.
5. Associate the person with a location. A person can have only one primary location but can have multiple secondary locations.

6. If you want to enable the person to sign in to and use the IBM TRIRIGA applications, on the **Profile** tab, do the following steps.

   a. Select **Active TRIRIGA User**.

   b. Specify a user name.

   c. Select at least one group for the user.

   d. Select at least one license for the user.

   When you activate the person, the system creates a My Profile record and assigns a default password of `password` for the new user.

7. Specify other details about the person as appropriate. To ensure that images are displayed properly in query results, it is recommended that you do not upload image files that are larger than 2MB.

8. Click **Create Draft**.

9. Save the people record.

What to do next

You can proceed to enter more details about the person and you can activate the people record or save and close it. The people record is now available to be assigned to spaces, such as offices.

Chapter 8. Managing assets

You set up and manage asset information so that users can complete various processes involving those assets, such as managing contracts and leases and planning space and moves.

Assets overview

Assets are owned or leased items, such as equipment, technology, tools, or furniture, that people use at a location within an organization.

Assets are unique instances of items and are associated with specifications. Specifications are used to categorize the assets.

You use information about assets when you complete many business processes within IBM TRIRIGA. For example, managing inventory, managing spaces and moves, and managing contracts all involve assets. Therefore, you set up your assets first before you complete other processes.

When you create an asset, you can associate it with an organization, with a primary location within the organization, and with the people who use it.

Any asset can be made available to be reserved if the **Reservable** field is selected on the **General** tab for the asset. Use the **Reserve** tab to set the reservation availability calendar and the cost and usage units details.

Facility assessment

The facility assessment process provides analysis of the existing and projected future condition of facilities and building systems and assets within those facilities. This process determines the immediate and long-term cost liabilities for the assessed building systems. It enables an organization to address operational requirements along with required funding requirements. As a result, buildings, structures, systems, and assets are maintained in a proactive manner. Property, land, building, structure, and asset records hold the primary facility assessment data.

For more information, see the *IBM TRIRIGA 10 Facility Assessment User Guide.*

Readings

Each asset in the system can be set up to feed readings to job plans. The job plan then evaluates the incoming reading against any reading-based PM schedules to see whether the reading is outside the defined operating parameters. If the incoming reading is outside the operating parameters, the system generates a task as defined in the associated request class and service plan. The system also associates any procedures that are listed on the PM schedule with the newly created tasks. A PM Reading Log record is created for each individual reading. When you open the PM Reading Log record from an asset, all fields are pre-populated except actual value.

Every reading log for each asset or location contains four values. The PM schedule can be set up to monitor any of these values. As a reading log is created, the

system calculates each of the values based on the actual recorded value.

Asset status

You can view the status of an asset in the **Asset Status** section of the **General** tab. You can also change the asset status by selecting a status action.

A transaction log tracks all asset status changes. You can view the log on the **History** tab. This tab also shows status changes that are triggered by other transactions.

The asset status actions that are available depend on the status of the asset. Different colors, as defined in the Status classification, reflect the different status values.

When you create and activate an asset, its status is Available. You can change the status to Lost, and then use the Found action to change the status back to Available when the asset is found. You can use the Assign action to assign the asset to a person. The status changes to Assigned and the asset is listed on the person's record. You can use the Unassign action to unassign the asset from the person and change the status back to Available.

You use the **Resource Downtime** action to mark an asset offline, for example, if it is down for maintenance. The offline status is displayed on the asset record.

Creating assets

You create assets to represent actual leased and owned property. You specify information to help you manage day-to-day tasks and processes that are related to those assets.

About this task

The type of information that you specify when you create assets varies depending on the type of asset you are creating. For example, you might enter environmental details for office equipment, but not for keys.

Procedure

1. Select **Portfolio** > **Assets** and then select the type of asset that you are creating.
2. Click **Add**.
3. On the General tab, specify a name for the asset.
4. Enter an ID for the asset. If you do not specify an ID, a unique ID is generated when the asset is saved or activated.
5. Associate the asset with a specification.
6. Specify other details about the asset as appropriate.
7. Click **Create Draft**.
8. Save the asset.

What to do next

You can proceed to enter more details about the asset on the other tabs and you can activate the asset or save and close it.

Retiring assets

If an asset is no longer in use, you can retire it. When you retire an asset, you must complete disposition information for audit purposes.

About this task

You can manually remove the associations between the retired asset and people, locations, and organizations, or you can specify that associations are removed when the retire action is approved. You also can retire multiple assets at one time by completing a Disposition Request on the **Requests** tab.

Procedure

1. In the portfolio, find and open the asset that you are retiring.
2. Select the **Retire** action.
3. Complete the details in the disposition form. Select the **Auto Cleanup** options if you want the associations between the asset and locations, people, and organizations to be removed automatically.
4. Click **Create**.

What to do next

If you did not select the **Auto Cleanup** options, you can manually remove the associations between the asset and locations, people, and organizations.

Chapter 9. Managing government data

You set up government information to help you track and manage the various locations, projects, and assets that belong to, or are managed by, your government organization.

Federal Real Property Profile

The Federal Real Property Profile (FRPP) is an online system that houses the federal real property inventory data. Agencies are required to report federal data annually, submitting an `.xml` file in a prescribed format. When you manage United States federal government locations, you must enter extra information in IBM TRIRIGA for reporting purposes.

The federal government feature must be enabled on the **Government Settings** tab in **Tools** > **System Setup** > **General** > **Application Settings**. When the feature is enabled on the application level, you can include or exclude a specific building, land, or structure in federal reports. This option is set by the **Used for FRPP Reporting** check box on the **General** tab.

When the feature is enabled on the **General** tab, the form shows another tab with federal government features for buildings, land, and structures. The **Federal** tab contains the fields that are described in the Federal Real Property Council's Guidance for Real Property Inventory Reporting.

Federal reporting

The IBM TRIRIGA Federal XML Reporting feature automates the process of retrieving federal data from IBM TRIRIGA and producing the `.xml` records that are needed for reporting.

You use the Location XML Report form that is in the **Tools** > **Data Utilities** to generate the Federal XML Reports. The Federal XML reports can be generated based on a selected set of locations. The generated `.xml` file is associated with the Location XML Report record and can be saved and downloaded. The process for the FRPP data submission of each file is handled outside of IBM TRIRIGA.

Real Property Information Model

The Real Property Information Model (RPIM) includes information about property, land, buildings, structures, spaces, projects, real estate contracts, and assets. The Real Property Information Model is used to track and report property information annually to the US Department of Defense. You must enter extra information in IBM TRIRIGA for reporting purposes.

The RPIM feature must be enabled on the **Government Settings** tab in **Tools** > **System Setup** > **General** > **Application Settings**. When the feature is enabled on the application level, you can include or exclude a specific record in RPIM reports. This option is set by the **Used for RPIM Reporting** check box on the **General** tab.

When the feature is enabled on the **General** tab, the form shows another tab with RPIM features. The **RPIM** tab contains the fields to track information about property, land, buildings, structures, spaces, projects, real estate contracts, or assets.

For example, when you create a property, you must enter information about that property information in the **RPIM** tab. This information is used in a report that is automatically generated and sent each year to the US Department of Defense.

The following examples are scenarios in which you can use the Real Property Information Model.

- Alex, a DemoCorp employee, wants to revise the information about Building 270 because a new addition was constructed. First, he reviews the details of the building. Then, he uses the **RPIM** tab to revise the information. The new information shows in the RPIM reports and reflects the new building addition.
- Louise, a Sarah Realty employee, wants to add a restriction and inspection task to Building 296 to ensure a thorough inspection before the building opens. First, she reviews the details of the building. Then, she uses the **RPIM** tab to add the information about the restriction and inspection task. The new information shows in the RPIM reports and reflects the restriction and inspection task.

Chapter 10. Managing contact roles

A contact role is a person that is assigned to a role that has specific role requirements within an organization or business processes. For example, a move planner, Joe Smith, is required to approve a move request. You manage contact role information to ensure that the people in your organization are assigned to the correct roles.

Contact role management

Contact roles are used to define specific roles with specific role requirements. To efficiently manage contact role information, you can create or reassign contact roles to multiple records in a single transaction.

You can use the Contact Role Manager application to manage contact role information for the following record types:
- Assets
- Contracts
- Geographies
- Locations
- Organizations
- Projects

You can create contact roles to assign contacts to multiple records in a single transaction. For example, the role of a space planner is required to be assigned to 10 buildings in your portfolio. You create the contact role by assigning that role to a contact for the 10 building records at one time.

To organize your information, you can filter and view the current list of contact roles for the selected records and add, reassign, or delete roles from these records when required.

You can reassign a contact role from one person to another on multiple records. For example, you can reassign the role of a move planner from Joe Smith to Mary Lane for 20 building records.

Alternative to reassigning contact roles by record, you can reassign contact roles by person. When you list the contact roles by person, you can view all of the associated assignments across all business objects.

Assigning contact roles

Work assignments are a typical part of a business organization as people are assigned to new roles or move from one role to another. To reflect these changes in an organization, you can assign contact roles to records to create or reassign contact role information.

Before you begin

Add contact role setup records to business objects by using the process for setting up contact roles.

Procedure

1. Select the module that you want to update the contact role for.

Module	Navigation to form
Assets, Geographies, Locations, or Organizations	**Portfolio > Set Up > Contact Role Manager**
Projects	**Projects > Set Up > Contact Role Manager**
Contracts	**Contracts > Set Up > Contact Role Manager**

   You assign reservation coordinator roles and resource owner roles that are associated with space records in the Reservation Group form.

2. In the **Parameters** section, select the business object or business object and form that you want to update.

3. To create a contact role:
   a. Specify the role and the contact that you want to assign to the role.
   b. Select the records for which you want to create the contact role and click **Create**.

4. To reassign a contact role:
   a. Select the contact that you want to reassign to the role.
   b. Select the records for which you want the contact role to be reassigned.
   c. In the **Contact Roles** section, select the contact role that is to be replaced and click **Reassign**.

Results

The person and role are displayed for the associated records in the **Contact Roles** section.

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