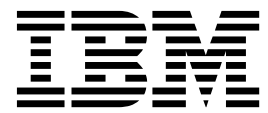


IBM TRIRIGA
Version 10 Release 6

*Space and Move Management
User Guide*



Note

Before using this information and the product it supports, read the information in “Notices” on page 65.

This edition applies to version 10, release 6, modification 0 of IBM TRIRIGA and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. Managing spaces and moves

You can use the IBM® TRIRIGA® space management feature to maintain space plans and track space utilization data in buildings and structures. You can also manage people and assets that are in the space, and coordinate property transactions. Meanwhile, you can use the IBM TRIRIGA move management feature to submit and process self-service move requests, create move designs, and plan move projects. You can also use IBM TRIRIGA CAD Integrator/Publisher to integrate your computer-aided design (CAD) applications with the IBM TRIRIGA product.

Chapter 2. Space and move management process flows

The business process flow in your organization might not perfectly match the business process flow or application process flow that is delivered with the IBM TRIRIGA application. In the IBM TRIRIGA Application Platform building tools, you can modify the process flows to meet your company standards and policies.

Space and move management overview

The space and move management overview flowchart describes the high-level overview of the space and move process as delivered by the IBM TRIRIGA application. The first phase identifies the space setup. The second phase identifies the space allocations to organizations. The third phase identifies the people assignments to spaces. The fourth phase identifies the asset assignments to spaces. The fifth phase identifies the tracking of people and assets after an assignment or move. When all of the space assignments are in place, the sixth phase identifies any move requests and move work. When all of the space setup and allocations are in place, the seventh phase identifies any space audit and space utilization processes.

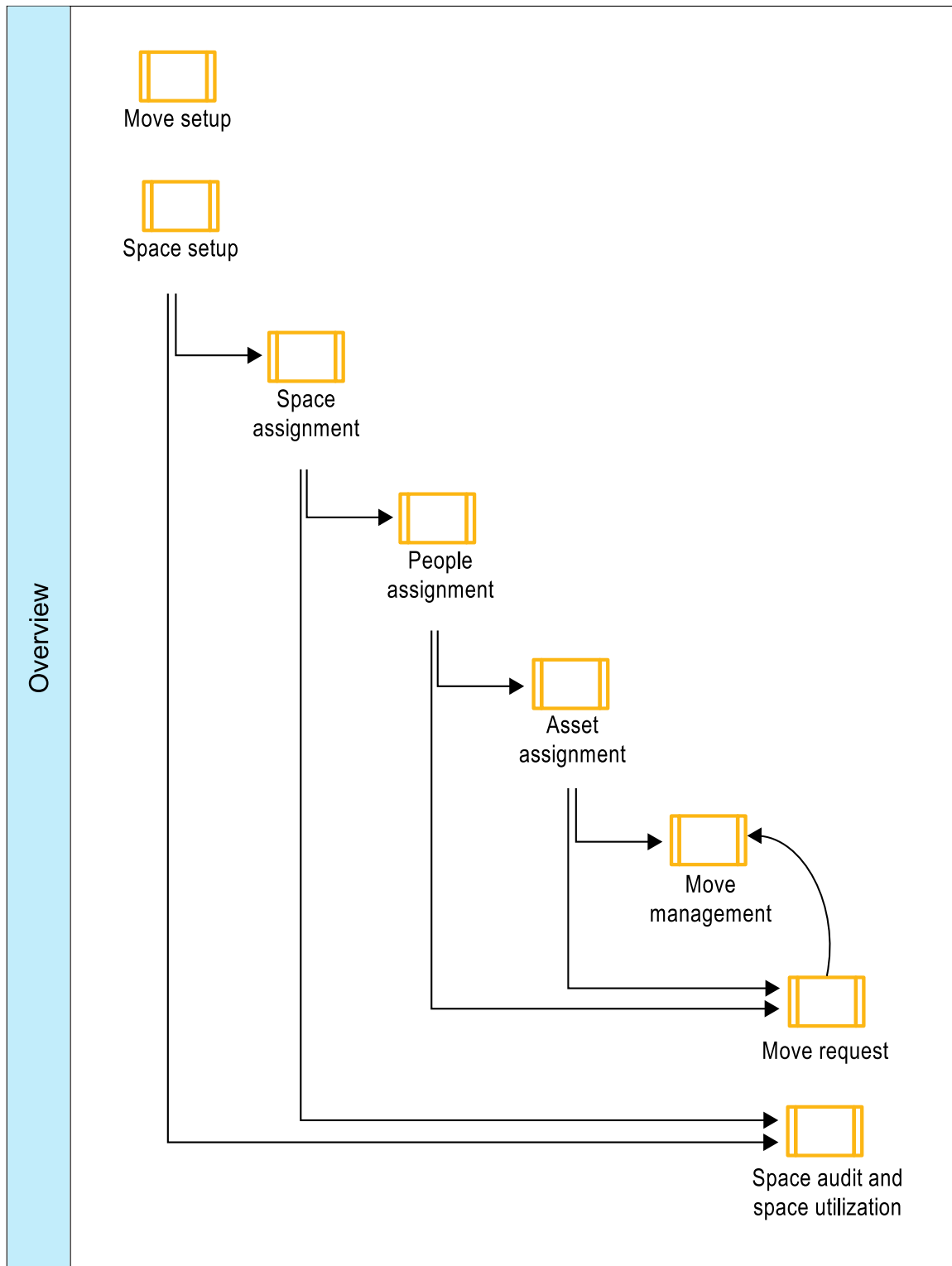


Figure 1. Space and move management overview

Related tasks:

Chapter 1, “Managing spaces and moves,” on page 1

You can use the IBM TRIRIGA space management feature to maintain space plans and track space utilization data in buildings and structures. You can also manage people and assets that are in the space, and coordinate property transactions. Meanwhile, you can use the IBM TRIRIGA move management feature to submit and process self-service move requests, create move designs, and plan move projects. You can also use IBM TRIRIGA CAD Integrator/Publisher to integrate your computer-aided design (CAD) applications with the IBM TRIRIGA product.

Space setup

This flowchart describes the process of setting up your floor locations in TRIRIGA. This process includes creating the floor locations, attaching CAD drawings to the floor records, and uploading the floor locations.

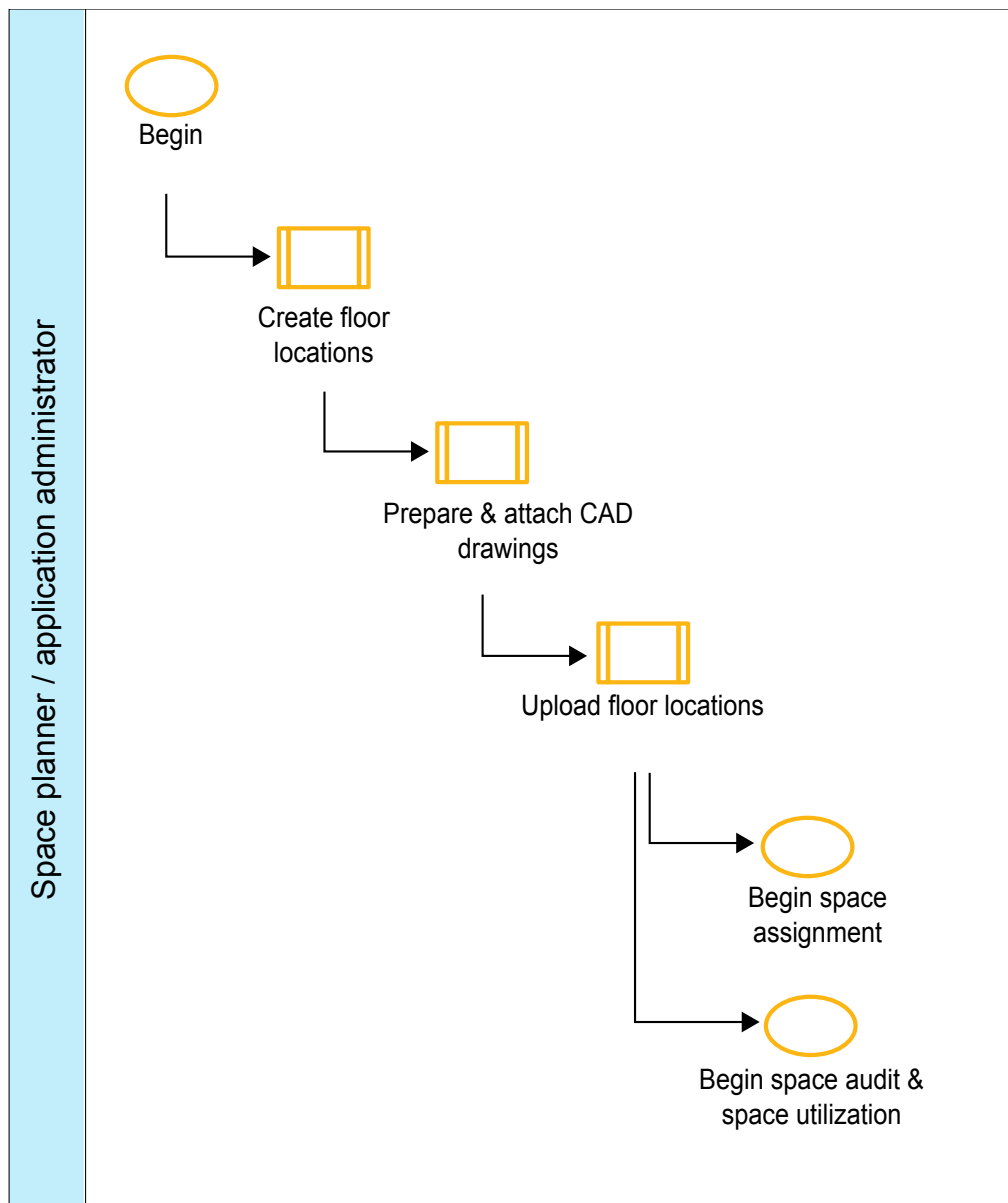


Figure 2. Space setup

Related tasks:

Attaching drawings, drawing objects, and boundaries to TRIRIGA records
In TRIRIGA CAD Integrator/Publisher, you can attach drawings and multiple boundaries, create or update records, and publish drawings and drawing objects individually, or all at one time. The attachment method that you use depends on your use of polyline standards and the number of drawings to process at one time. Typically, you attach CAD drawing information to TRIRIGA records with the Smart Attach feature, where you can perform multiple functions at one time.

Publishing the drawing information

Publishing a drawing uploads a .dxf file representation of the CAD drawing to the TRIRIGA environment where the .dxf file is processed for display as a web graphic. After the drawing is published, TRIRIGA users can view and report on the drawing in the Graphics section in the TRIRIGA environment.

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.

Creating floor locations

This flowchart describes the process of creating the floor locations.

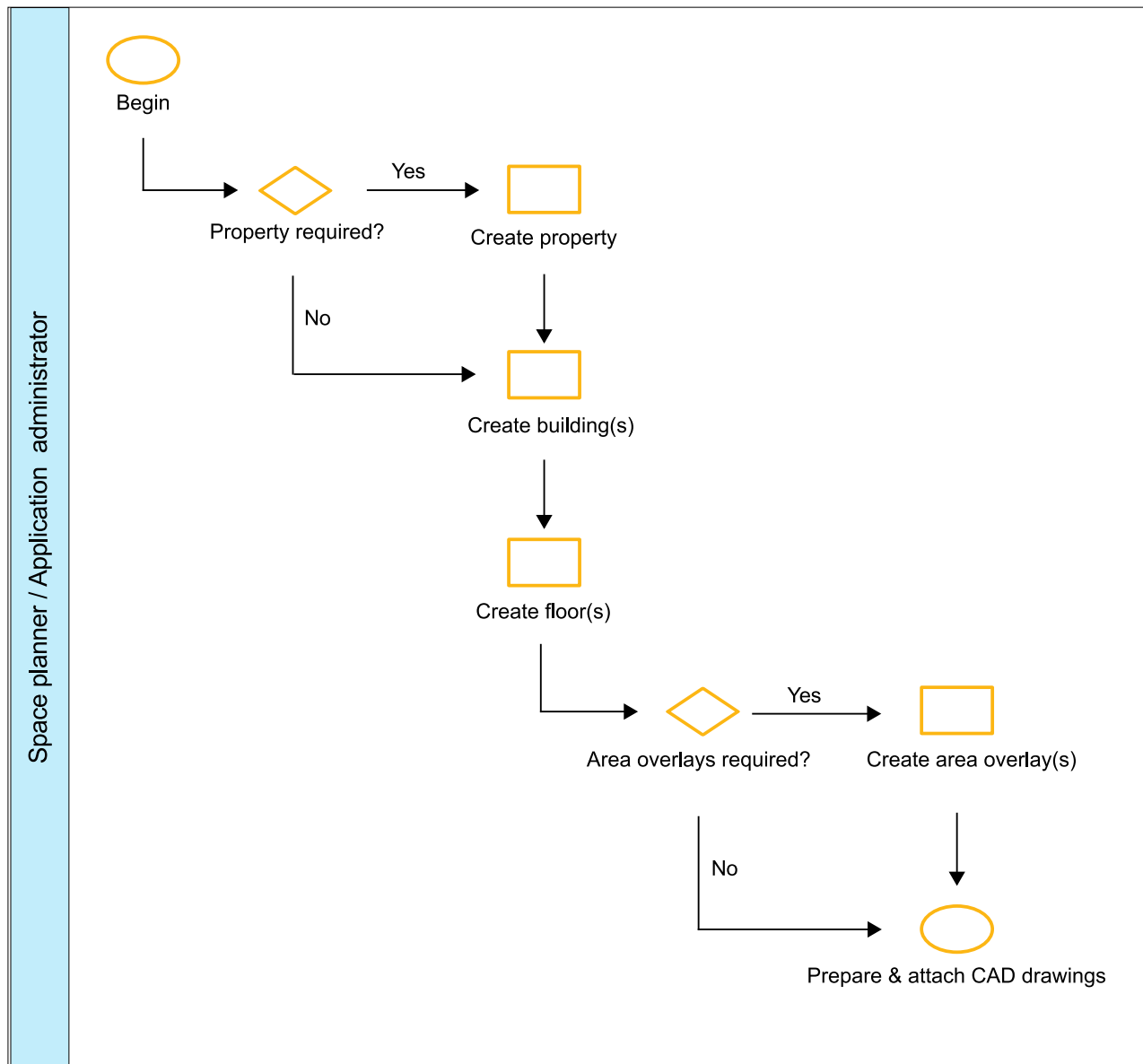


Figure 3. Creating floor locations

Preparing and attaching CAD drawings

This flowchart describes the process of attaching CAD drawings to the floor records.

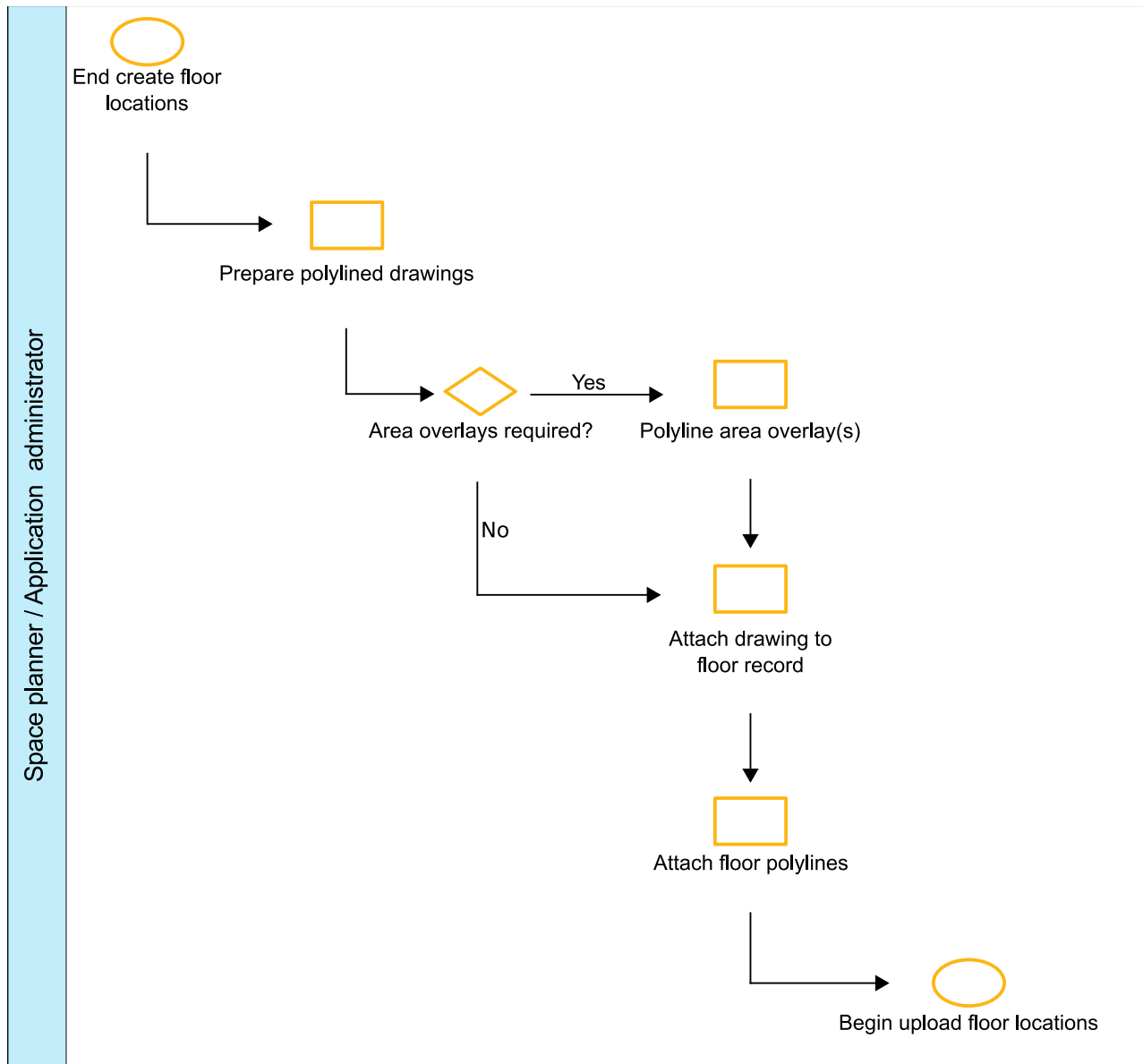


Figure 4. Preparing and attaching CAD drawings

Uploading floor locations

This flowchart describes the process of uploading the floor locations.

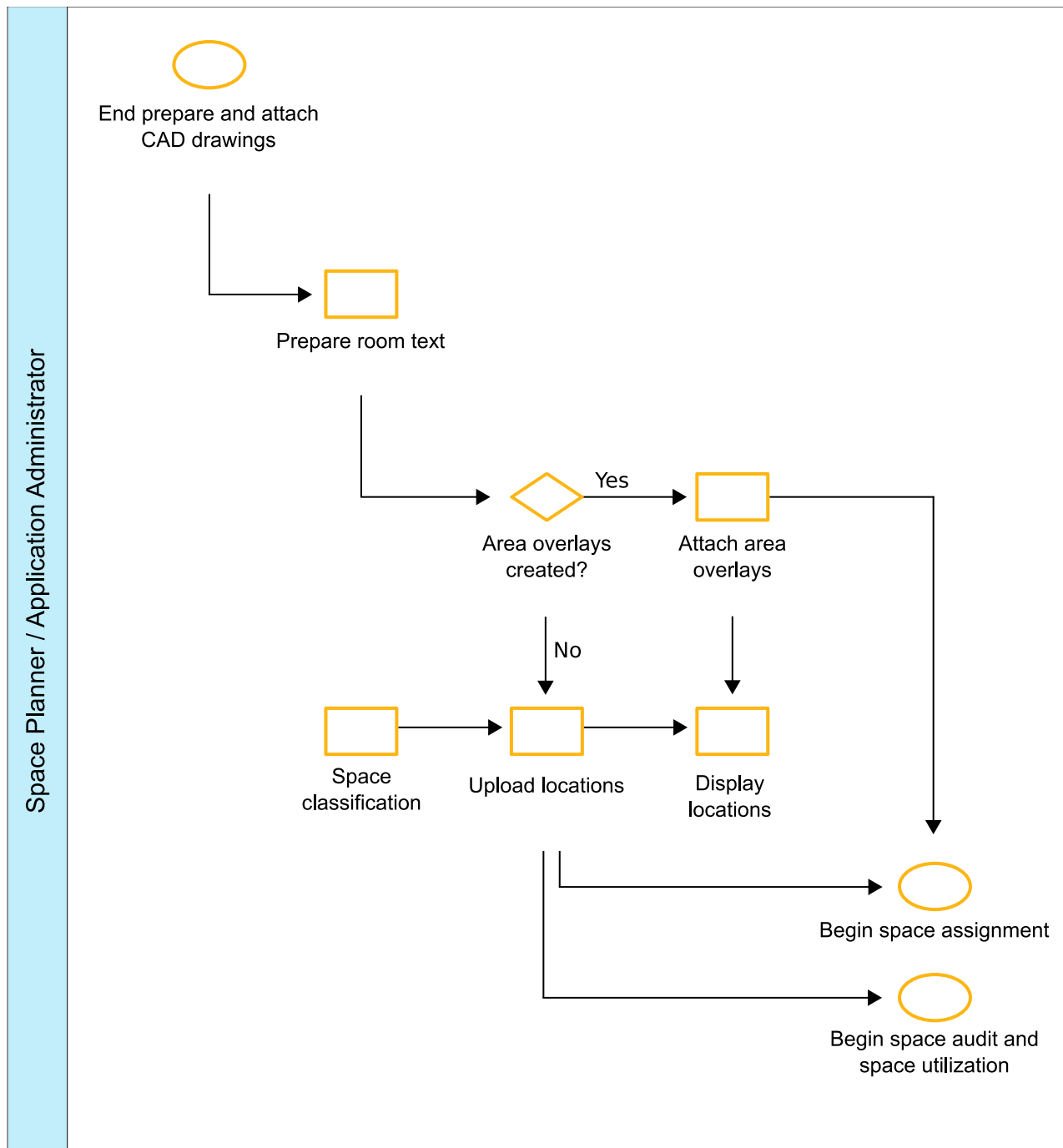


Figure 5. Uploading floor locations

Space allocation

This flowchart describes the process of allocating your spaces to organizations in TRIRIGA. This process includes creating the organizations, allocating spaces to the organizations, and adjusting any allocations shared by multiple organizations.

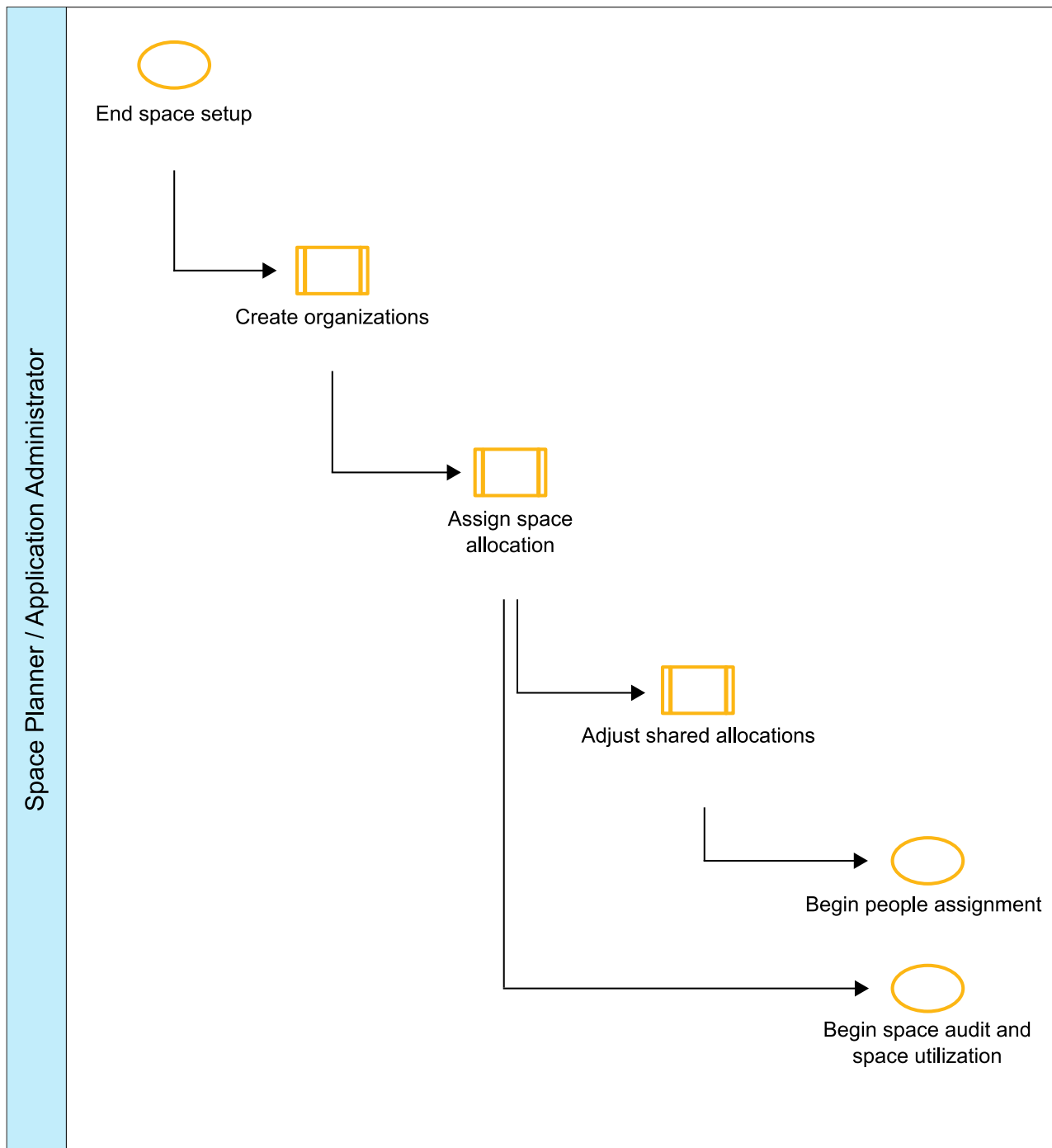


Figure 6. Space allocation

Related concepts:

“Space associations” on page 45

A space association is a type of relationship between the space record and the associated record. Space associations include space allocations and space assignments. A space allocation is an association between a space record and one or more organization records. A space assignment is an association between a person or asset record and one or more space records.

Related tasks:

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.

“Associating spaces” on page 51

You can allocate a space or area to one or more organizations. You can also assign a person or asset to one or more spaces.

Create organizations

This flowchart describes the process of creating the organizations.

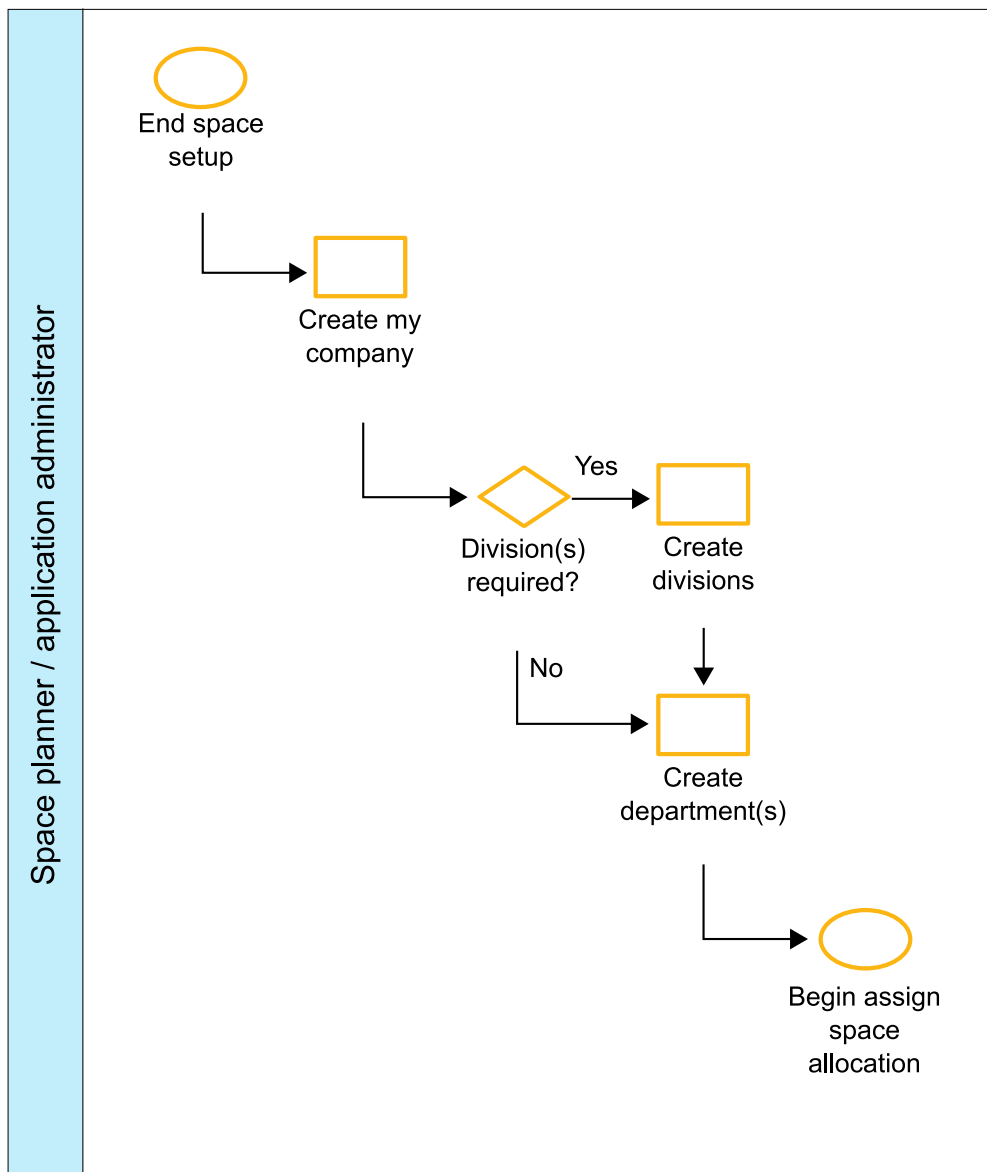


Figure 7. Create organizations

Related tasks:

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.

Assign space allocation

This flowchart describes the process of allocating spaces to the organizations.

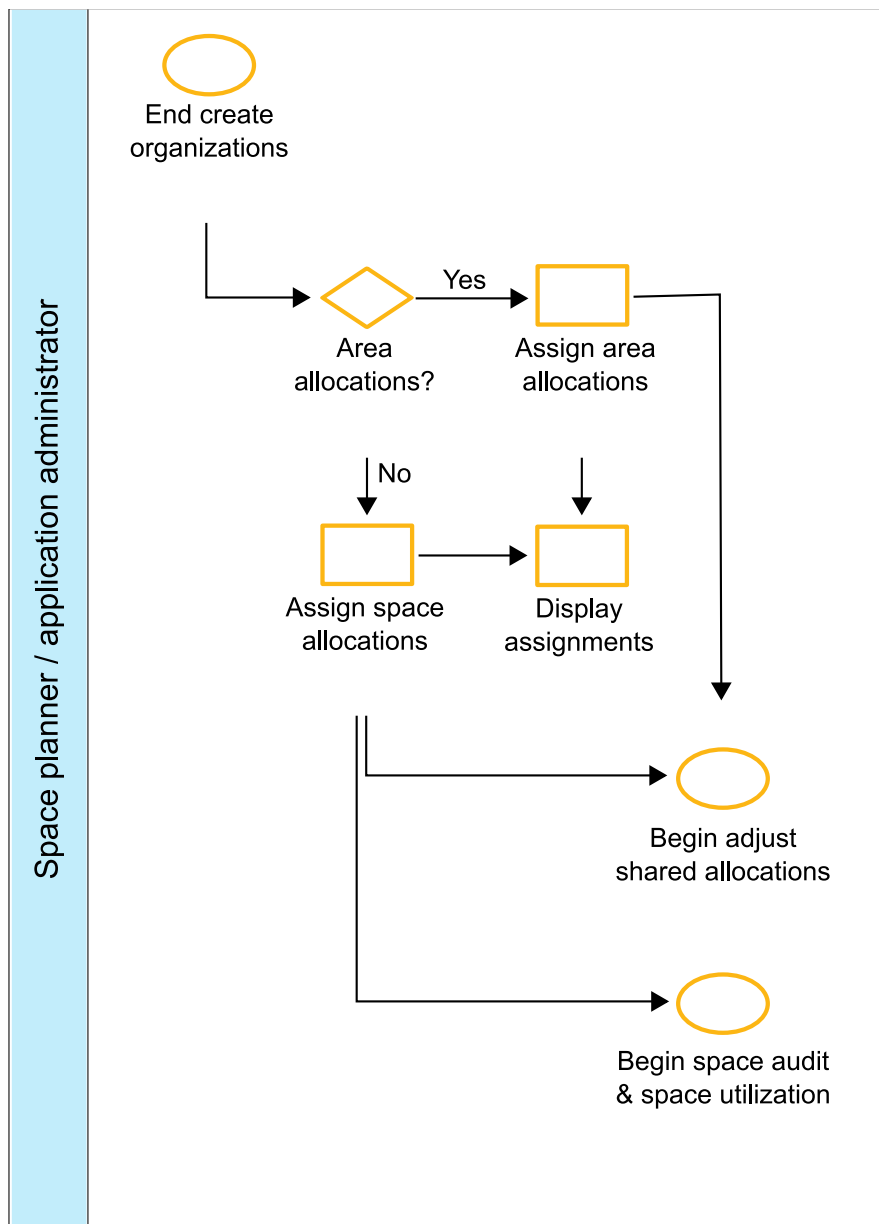


Figure 8. Assign space allocation

Related tasks:

“Associating spaces” on page 51

You can allocate a space or area to one or more organizations. You can also assign a person or asset to one or more spaces.

Adjust shared allocations

This flowchart describes the process of adjusting any allocations shared by multiple organizations.

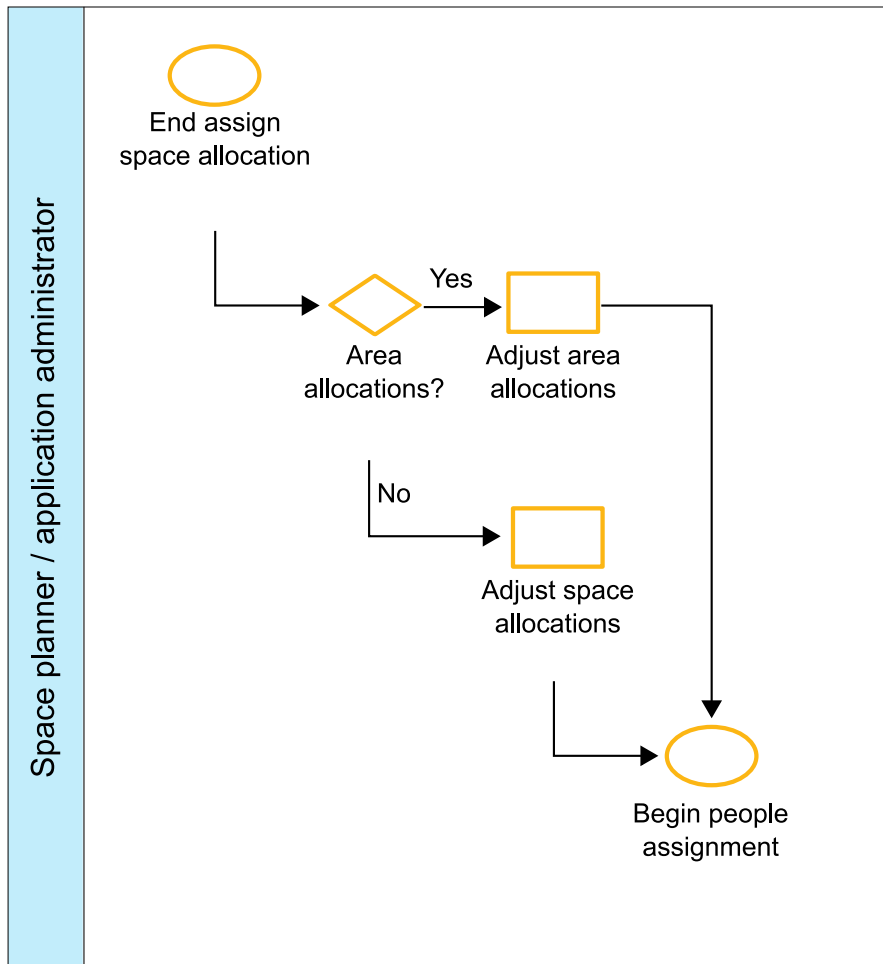


Figure 9. Adjust shared allocations

People assignment

This flowchart describes the process of assigning people to spaces in TRIRIGA. This process includes creating the people records, assigning people to the spaces, and updating the occupancy.

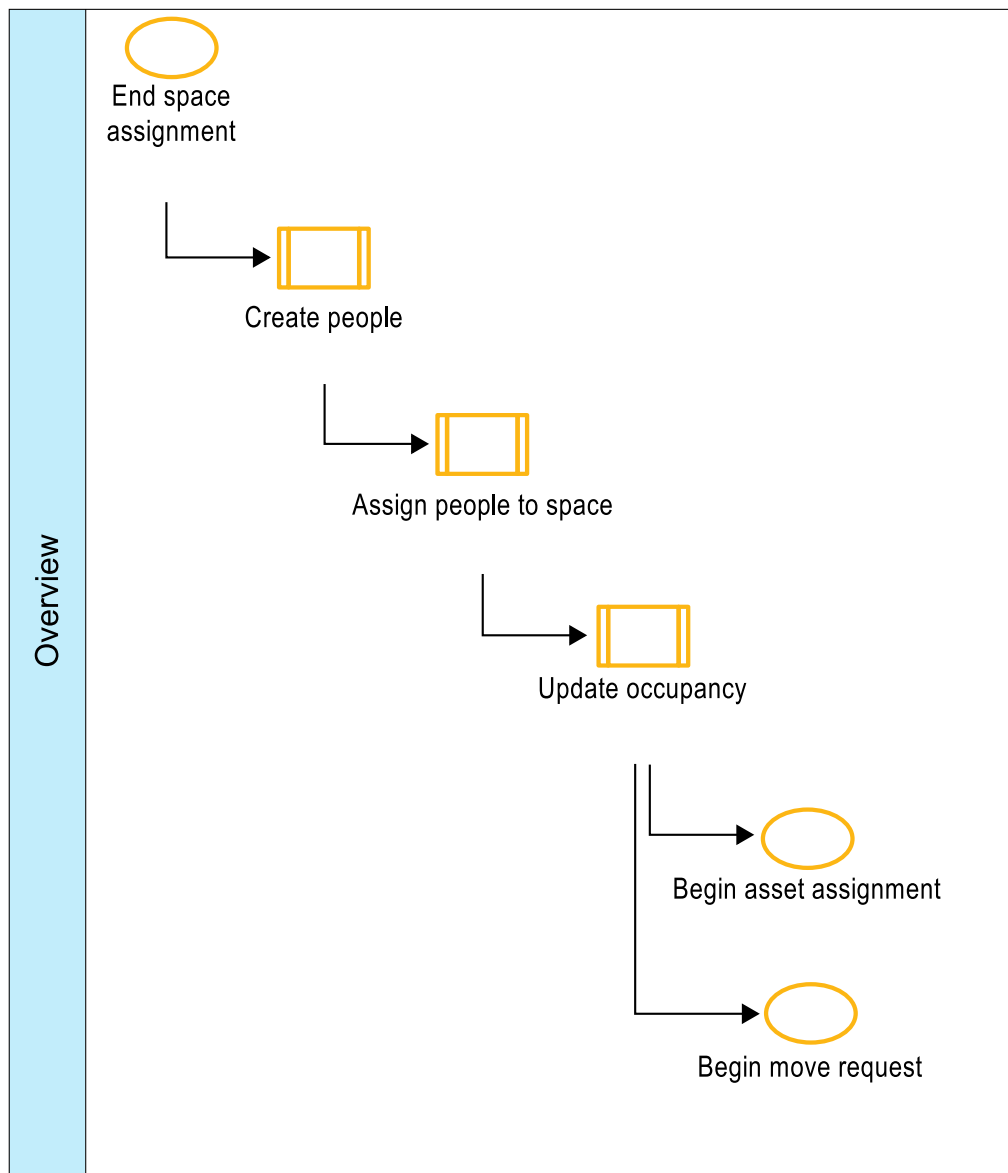


Figure 10. People assignment

Related concepts:

"Space associations" on page 45

A space association is a type of relationship between the space record and the associated record. Space associations include space allocations and space assignments. A space allocation is an association between a space record and one or more organization records. A space assignment is an association between a person or asset record and one or more space records.

Related tasks:

Managing people

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

“Associating spaces” on page 51

You can allocate a space or area to one or more organizations. You can also assign a person or asset to one or more spaces.

Create people

This flowchart describes the process of creating the people records.

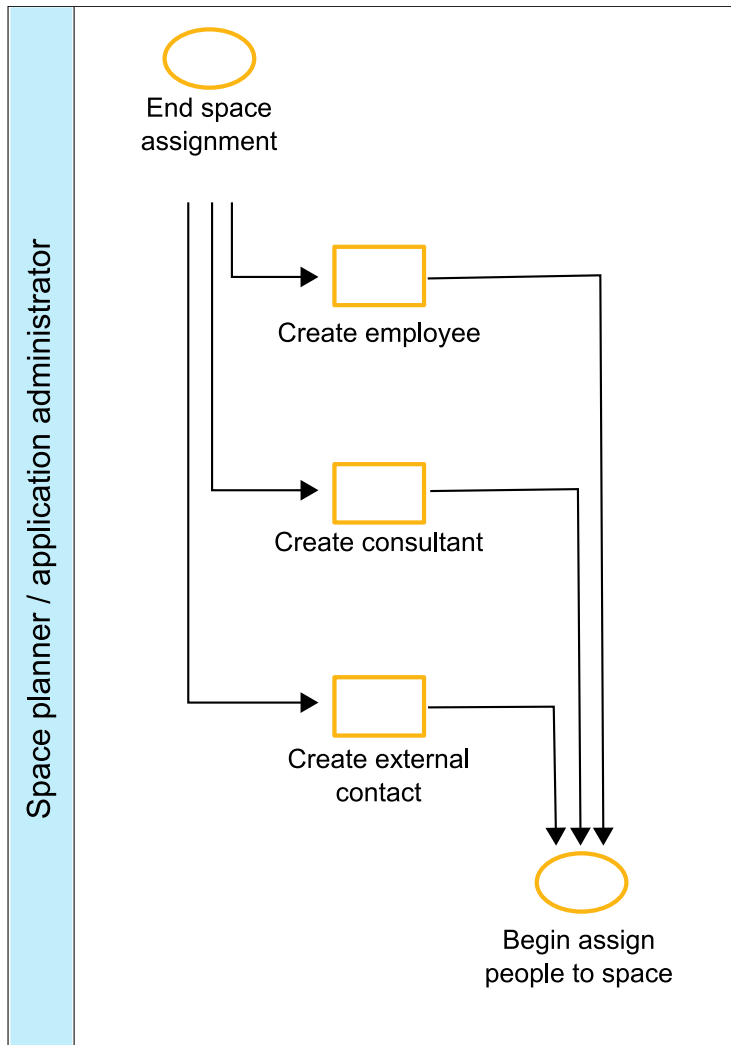


Figure 11. Create people

Related tasks:

Managing people

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

Assign people to space

This flowchart describes the process of assigning people to the spaces.

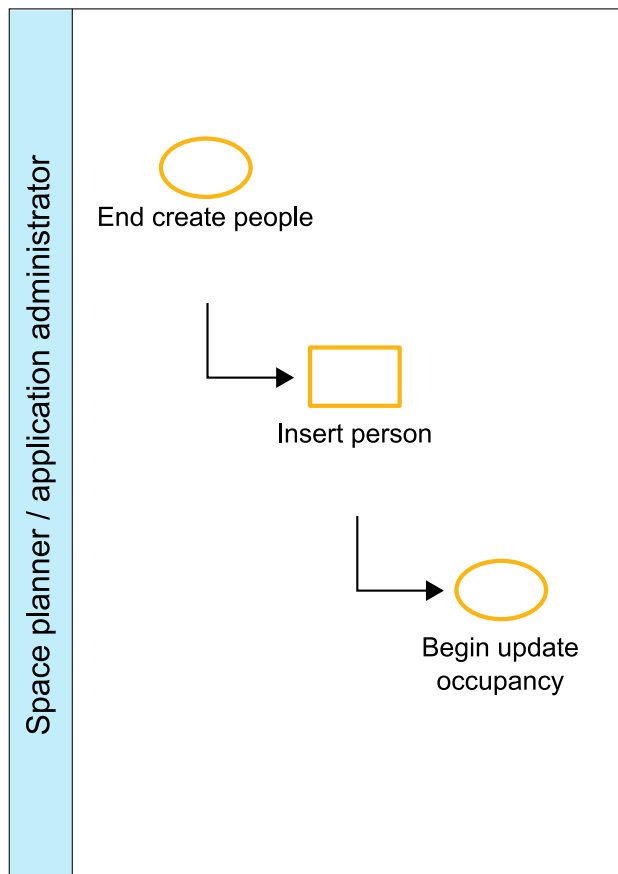


Figure 12. Assign people to space

Related tasks:

“Associating spaces” on page 51

You can allocate a space or area to one or more organizations. You can also assign a person or asset to one or more spaces.

Asset assignment

This flowchart describes the process of assigning assets to spaces in TRIRIGA. This process includes creating the asset records, and assigning assets to the spaces.

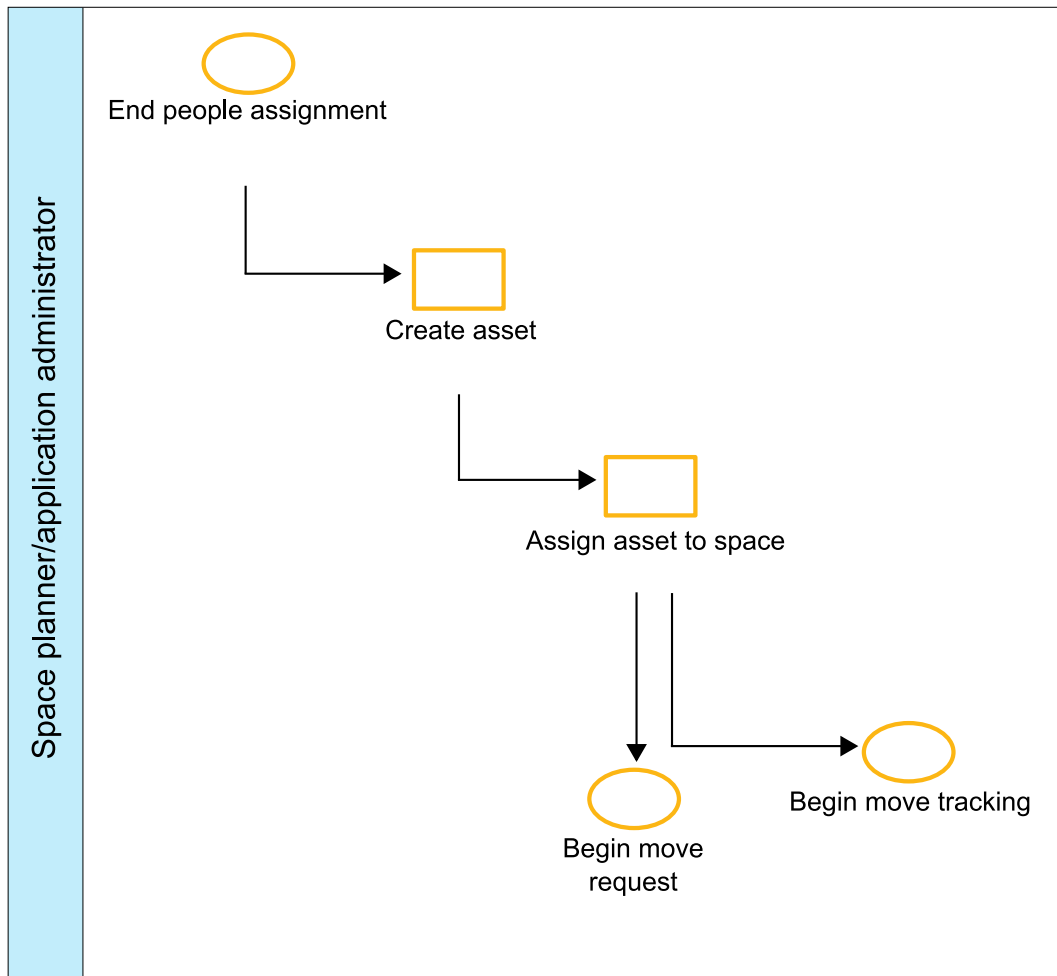


Figure 13. Asset assignment

Related concepts:

"Space associations" on page 45

A space association is a type of relationship between the space record and the associated record. Space associations include space allocations and space assignments. A space allocation is an association between a space record and one or more organization records. A space assignment is an association between a person or asset record and one or more space records.

Related tasks:

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.

"Associating spaces" on page 51

You can allocate a space or area to one or more organizations. You can also assign a person or asset to one or more spaces.

Create asset

This flowchart describes the process of creating the asset records.

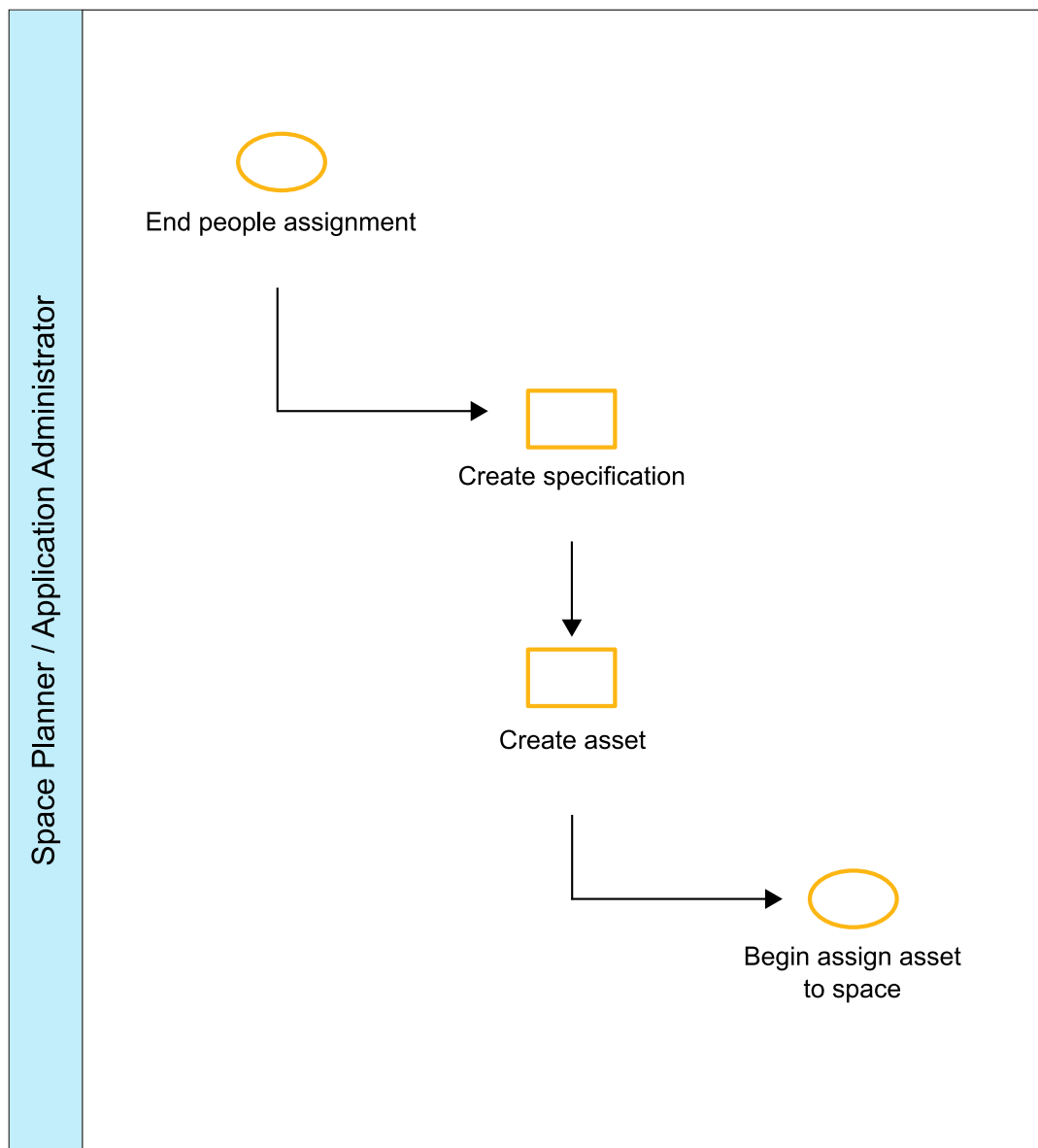


Figure 14. Create asset

Related tasks:

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.

Assign asset to space

This flowchart describes the process of assigning assets to the spaces.

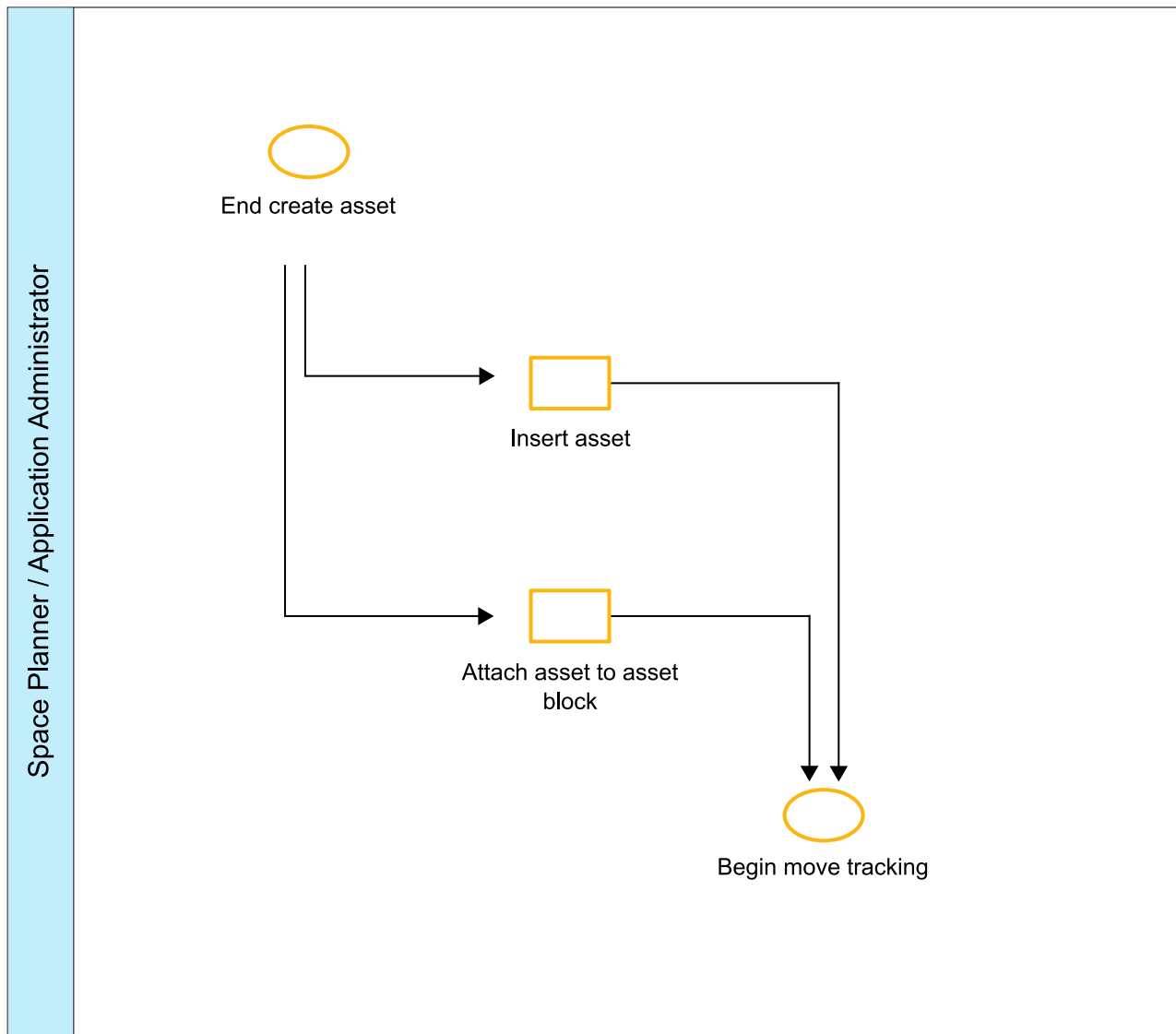


Figure 15. Assign asset to space

Related tasks:

“Associating spaces” on page 51

You can allocate a space or area to one or more organizations. You can also assign a person or asset to one or more spaces.

Update occupancy

This flowchart describes the process of updating the occupancy.

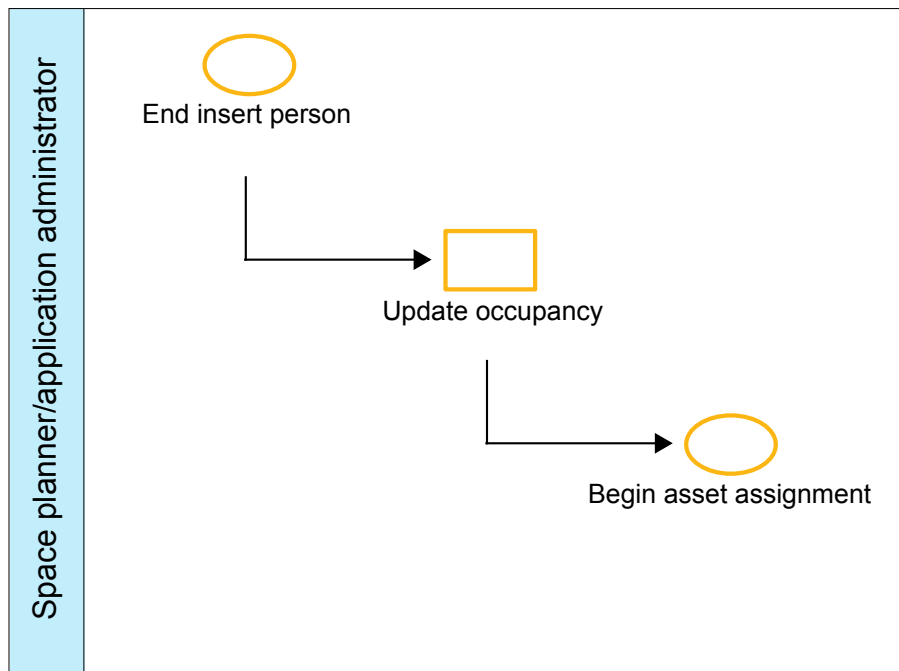


Figure 16. Update occupancy

Move tracking

This flowchart describes the process of updating the space assignments after a new assignment or move in TRIRIGA. This process includes updating the people assignments, and updating the asset assignments.

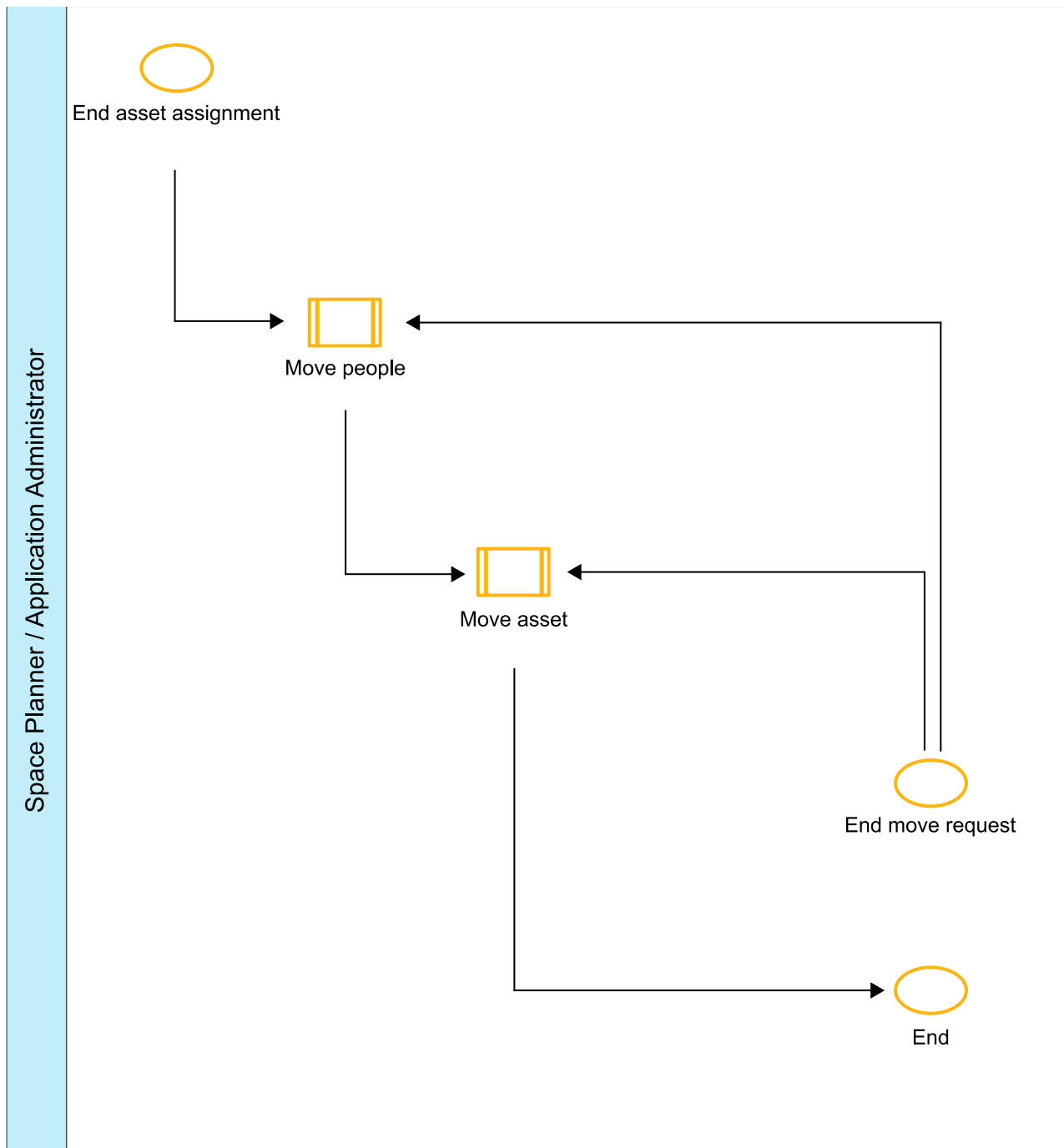


Figure 17. Move tracking

Related concepts:

“Space associations” on page 45

A space association is a type of relationship between the space record and the associated record. Space associations include space allocations and space assignments. A space allocation is an association between a space record and one or more organization records. A space assignment is an association between a person or asset record and one or more space records.

Related tasks:

“Associating spaces” on page 51

You can allocate a space or area to one or more organizations. You can also assign a person or asset to one or more spaces.

Move people

This flowchart describes the process of updating the moved people assignments.

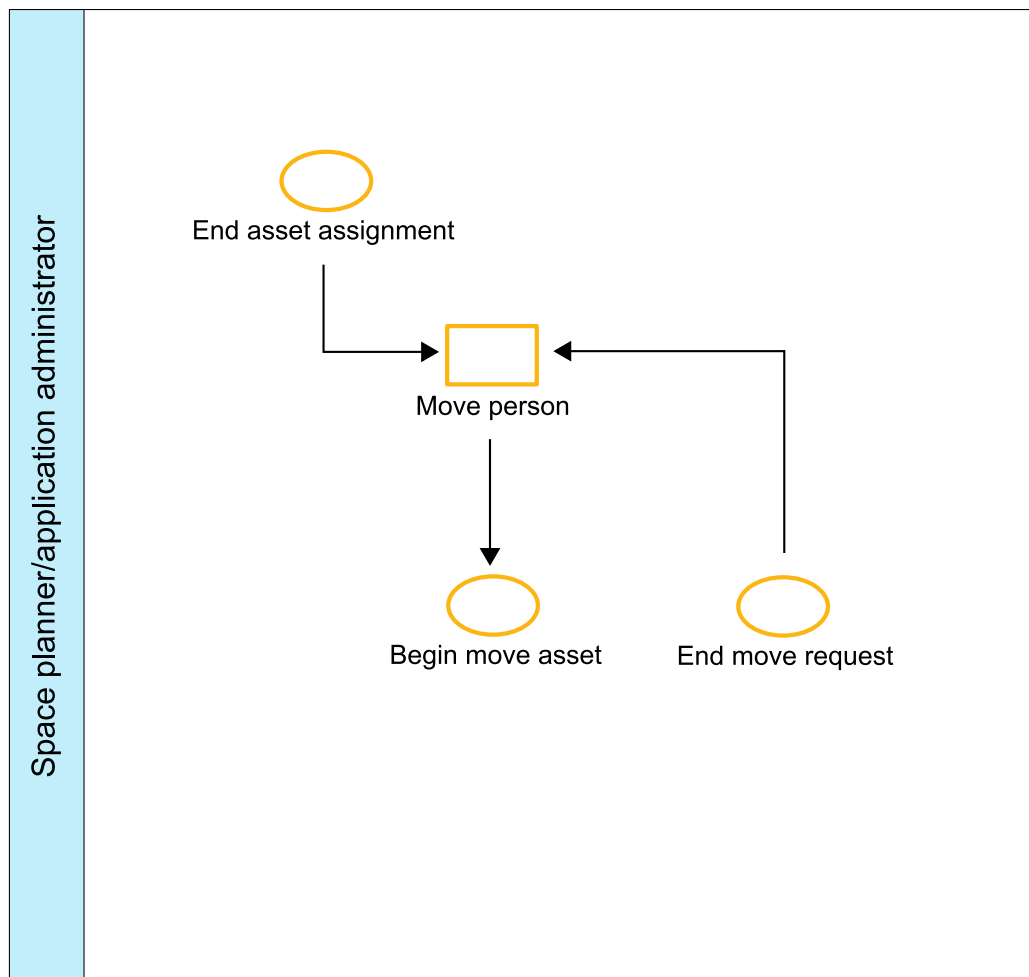


Figure 18. Move people

Related tasks:

“Associating spaces” on page 51

You can allocate a space or area to one or more organizations. You can also assign a person or asset to one or more spaces.

Move asset

This flowchart describes the process of updating the moved asset assignments.

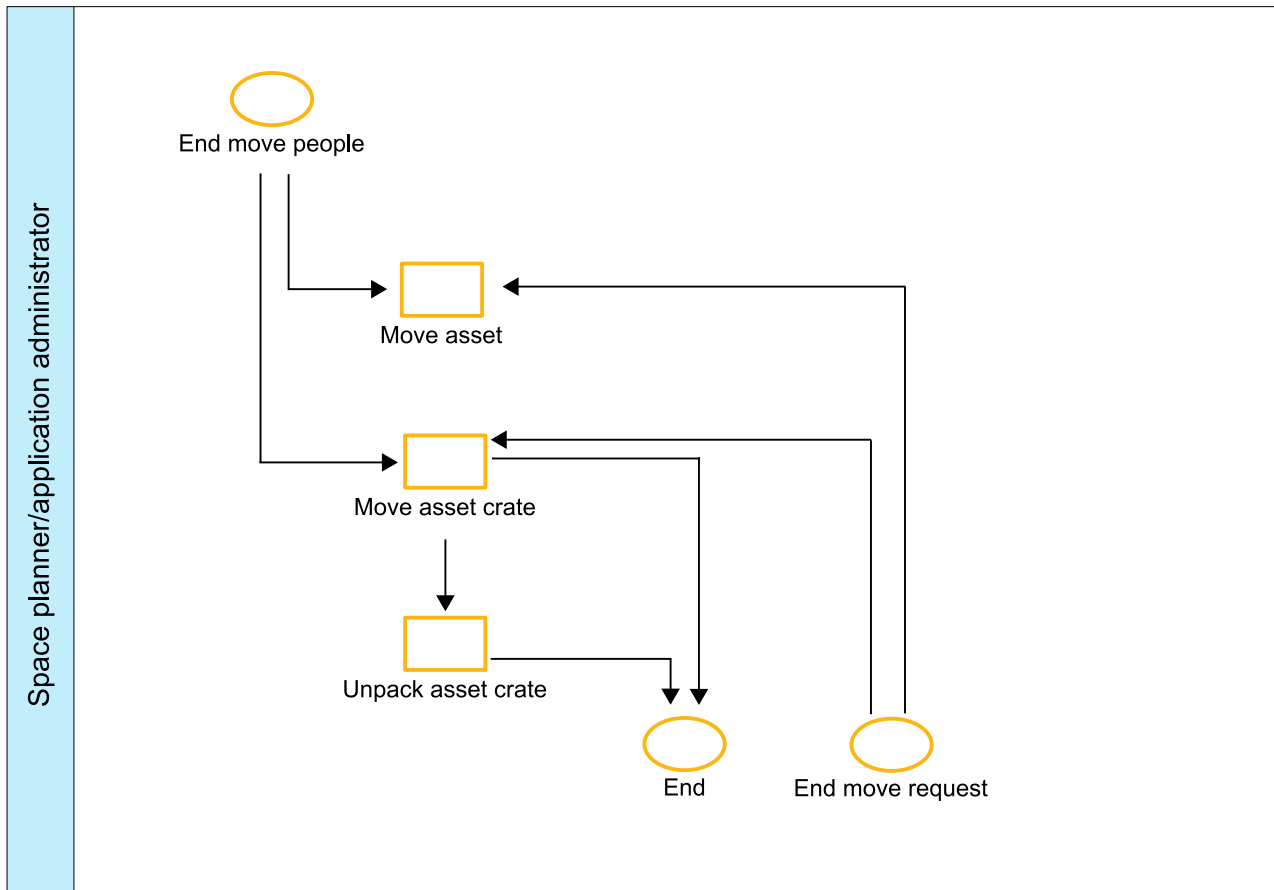


Figure 19. Move asset

Related tasks:

“Associating spaces” on page 51

You can allocate a space or area to one or more organizations. You can also assign a person or asset to one or more spaces.

Move request

This flowchart describes the process of fulfilling a move request in TRIRIGA. This process includes initiating the move request, generating the move project or tasks, assigning the work, completing the work, and sending the customer surveys.

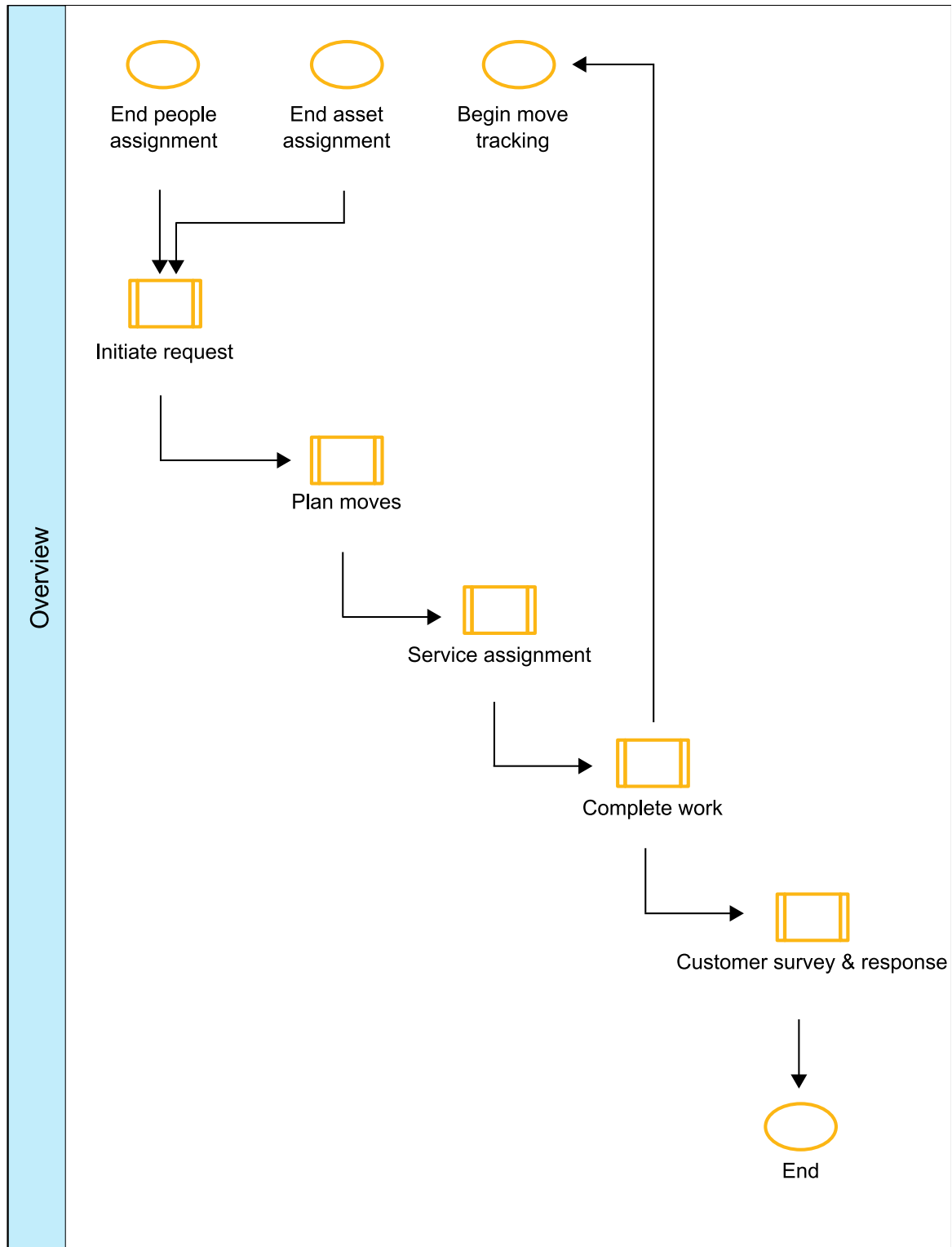


Figure 20. Move request

Related tasks:

“Managing move requests” on page 55

Many organizations manage their move requests by planning move projects on a regular schedule. But sometimes a move request must be managed on an individual basis. One example is a move request that results from a defect that is discovered in the workspace.

Initiate move request

This flowchart describes the process of initiating the move request.

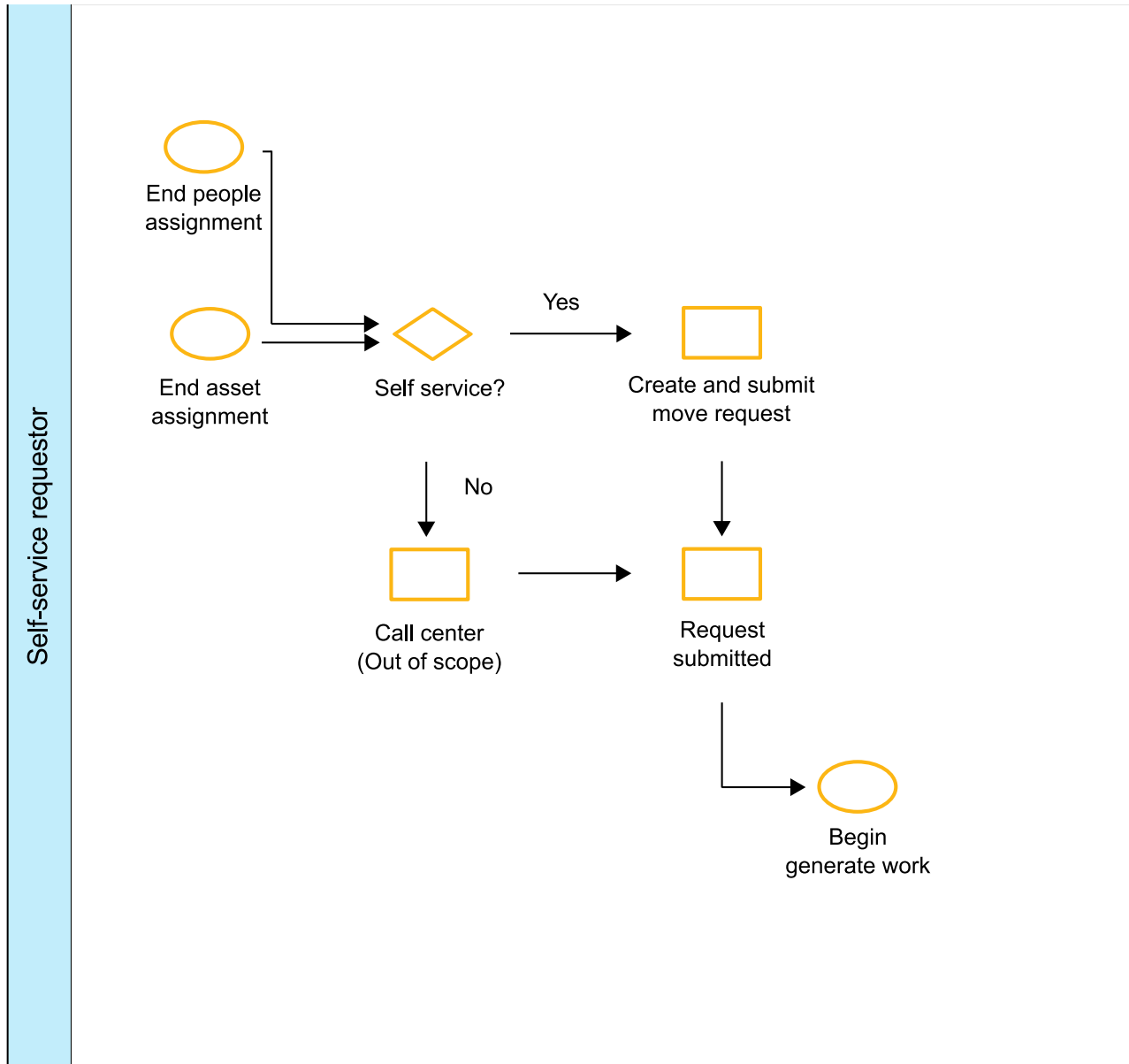


Figure 21. Initiate move request

Plan moves

This flowchart describes the process of generating the move project or tasks.

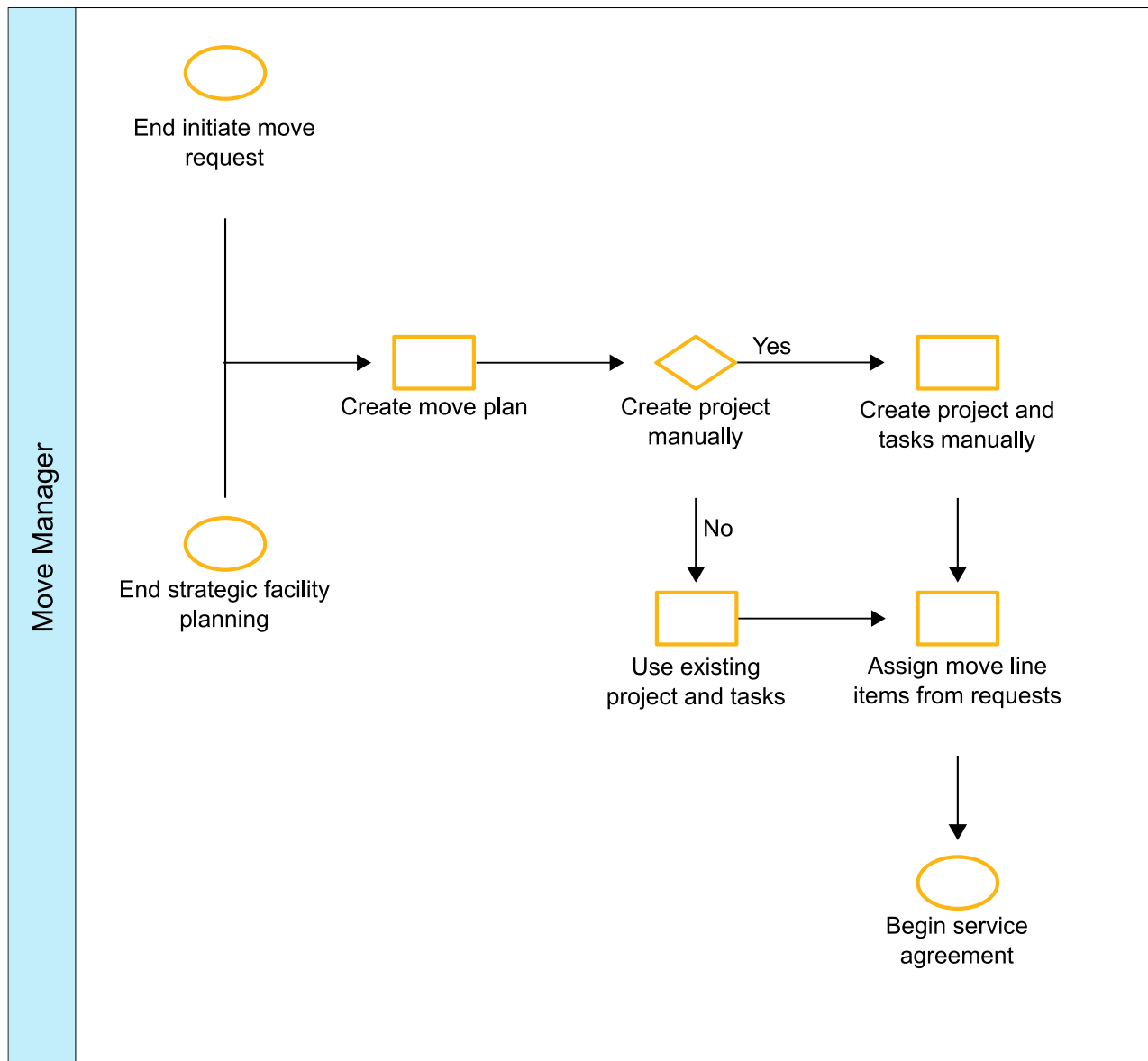


Figure 22. Plan moves

Service assignment

This flowchart describes the process of assigning the work.

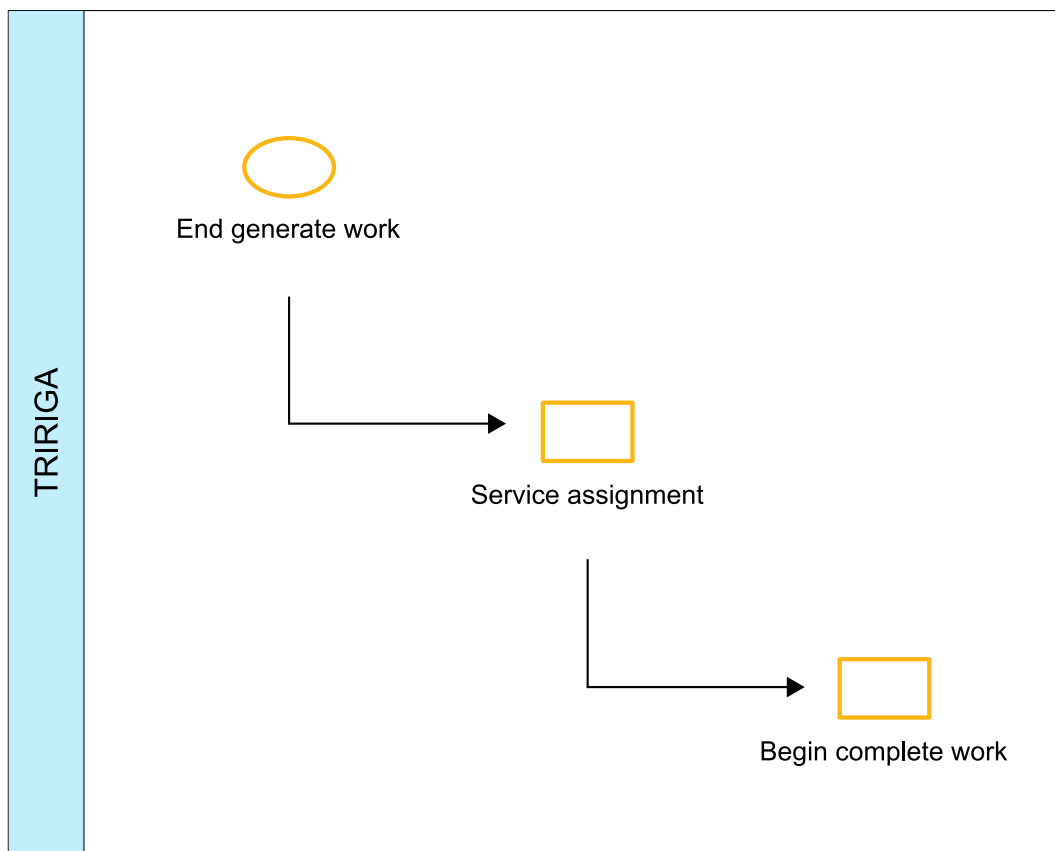


Figure 23. Service assignment

Complete work

This flowchart describes the process of performing and completing the work.

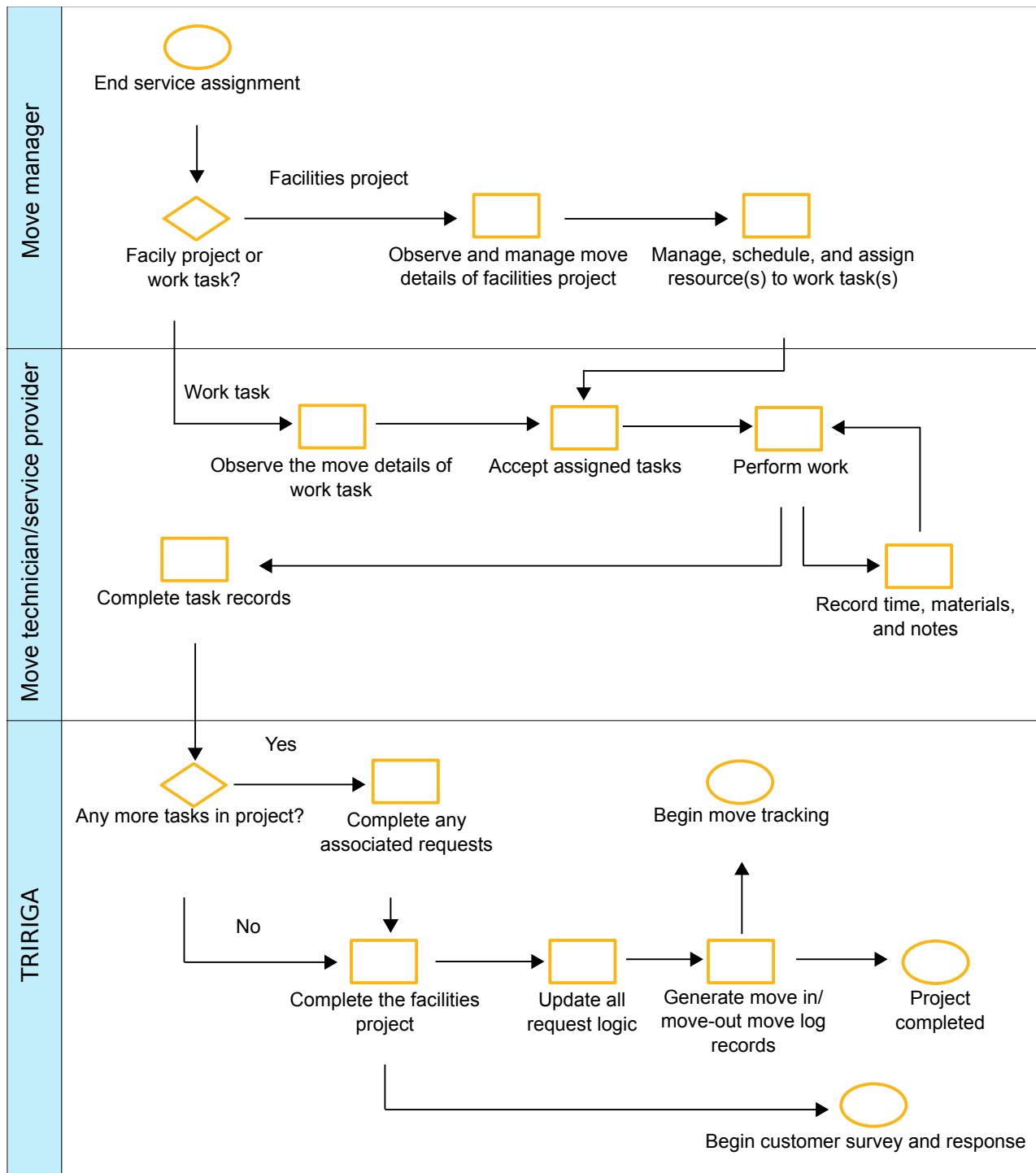


Figure 24. Complete work

Customer survey and response

This flowchart describes the process of sending and receiving the customer surveys.

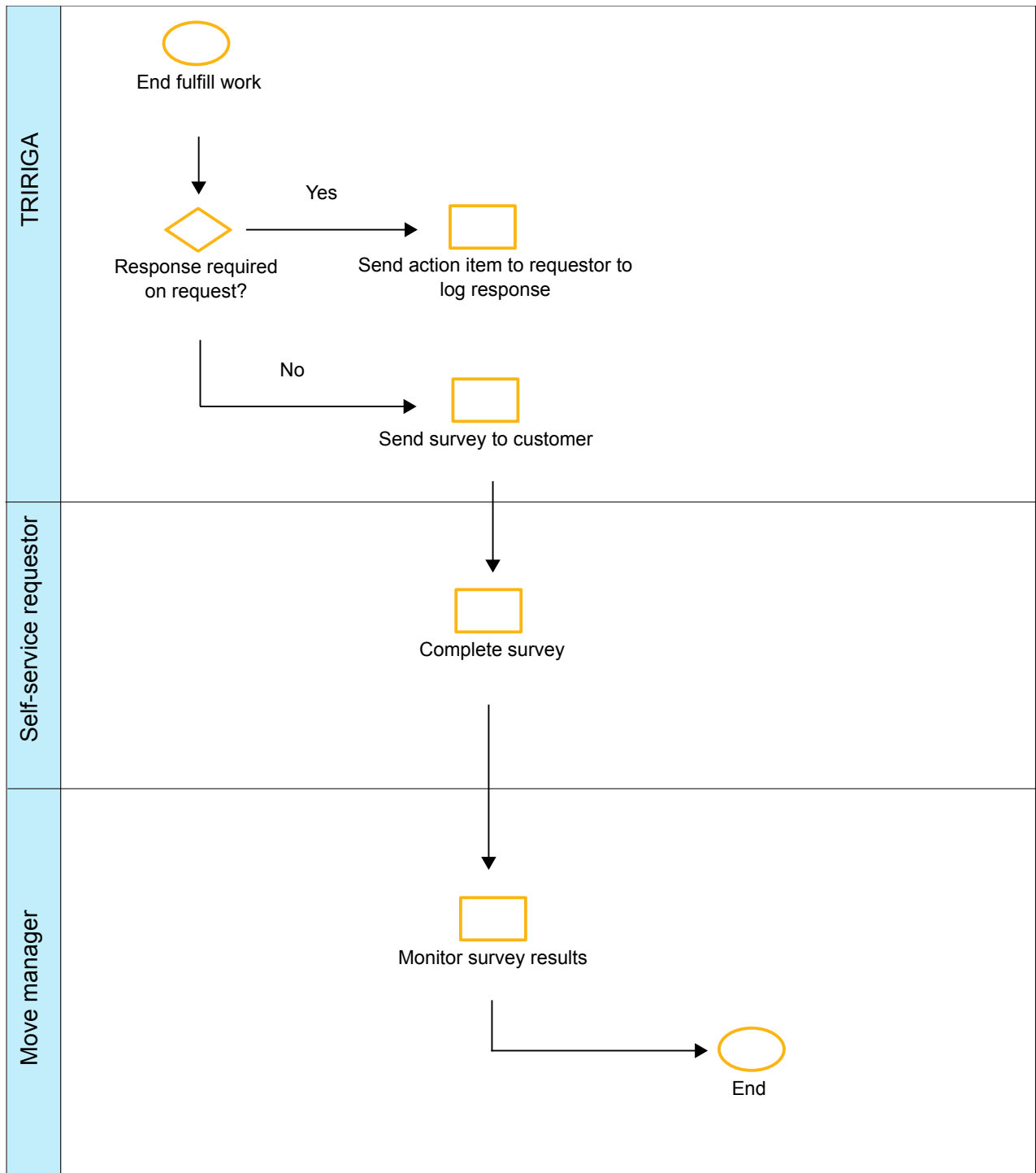


Figure 25. Customer survey and response

Space audit and space utilization

This flowchart describes the process of conducting space audits and tracking space utilization in TRIRIGA. This process includes generating space audit master records, space audit records, and space utilization records.

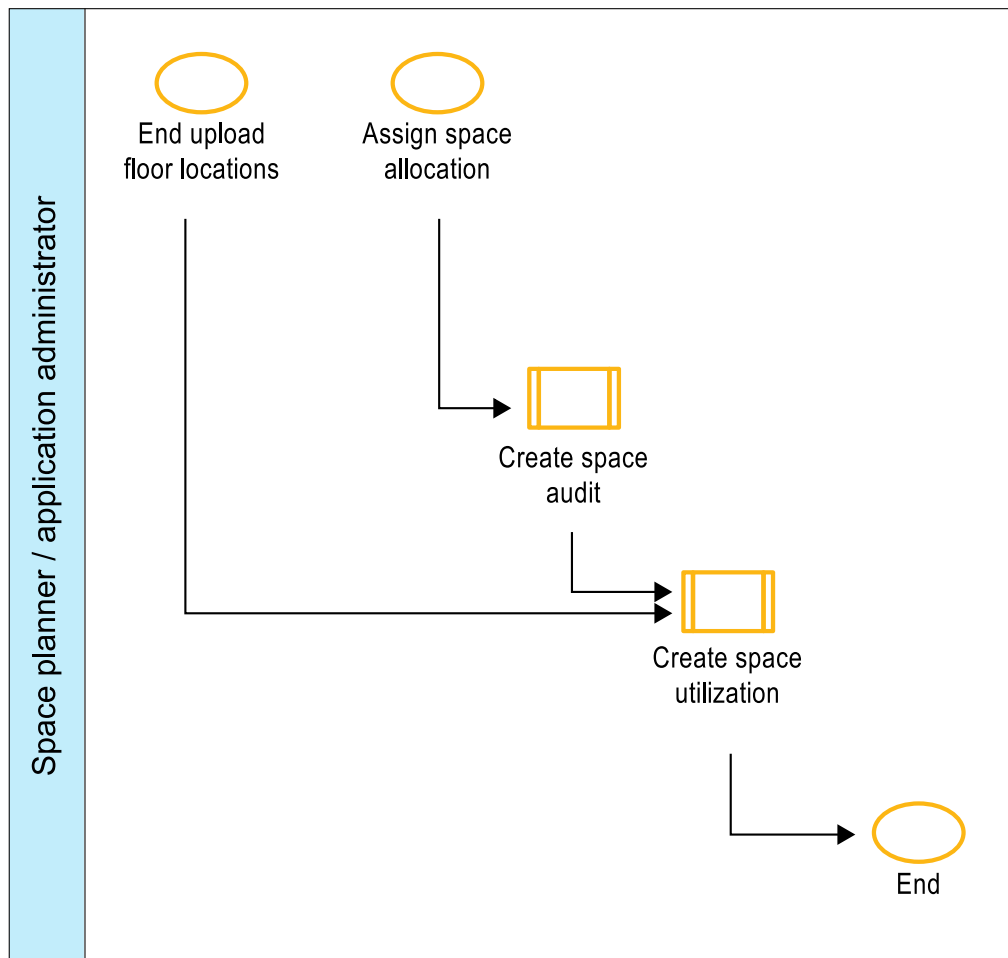


Figure 26. Space audit and space utilization

Related concepts:

"Space audits" on page 48

A space audit is a snapshot or capture of the space details in a building or structure to evaluate the accuracy, efficiency, and utility of spaces. You can conduct space audits regularly to track and compare space allocations, space usage, and space costs over time.

Create space audit

This flowchart describes the process of generating the space audit master records and space audit records.

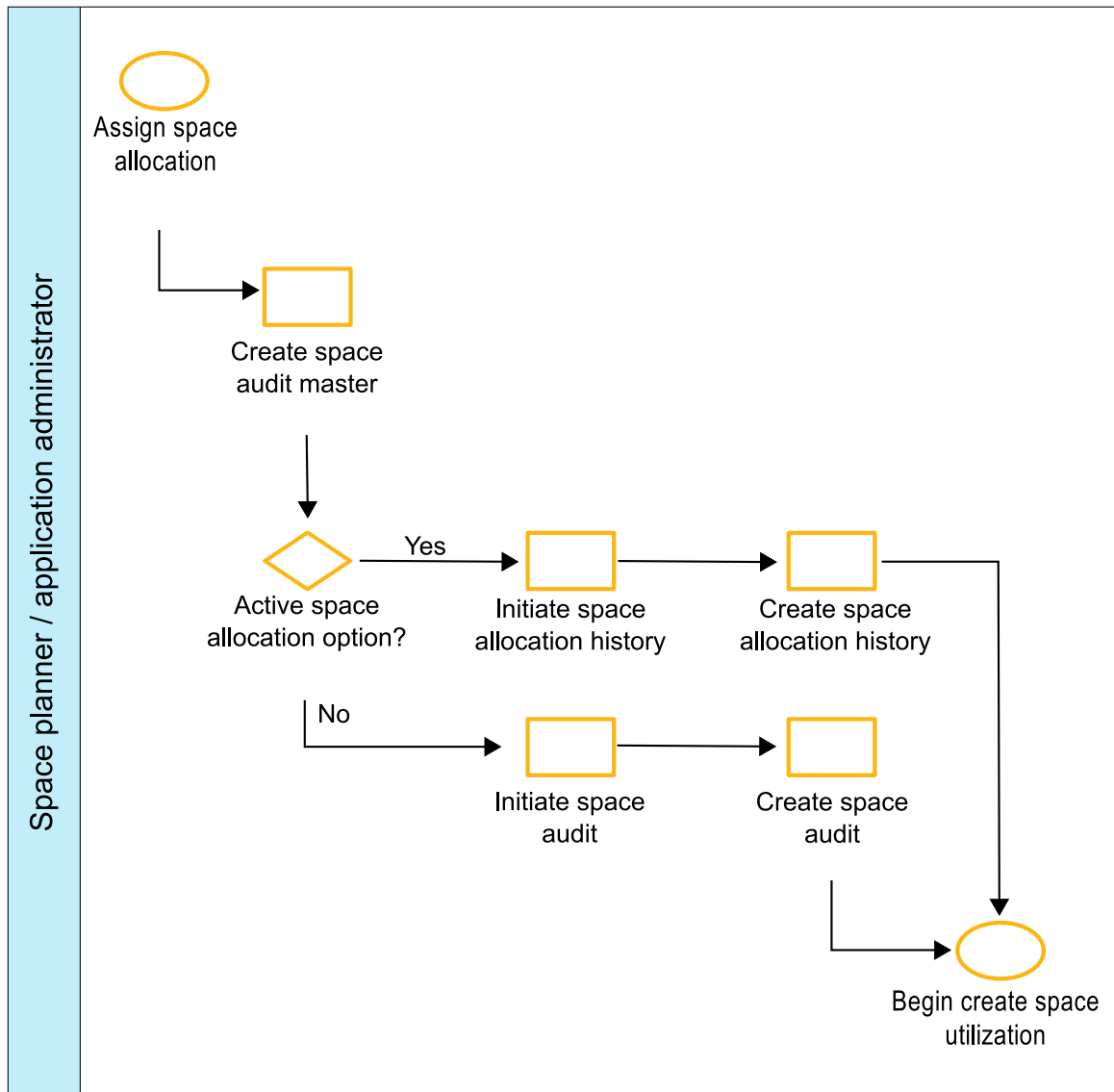


Figure 27. Create space audit

Create space utilization

This flowchart describes the process of generating the space utilization records.

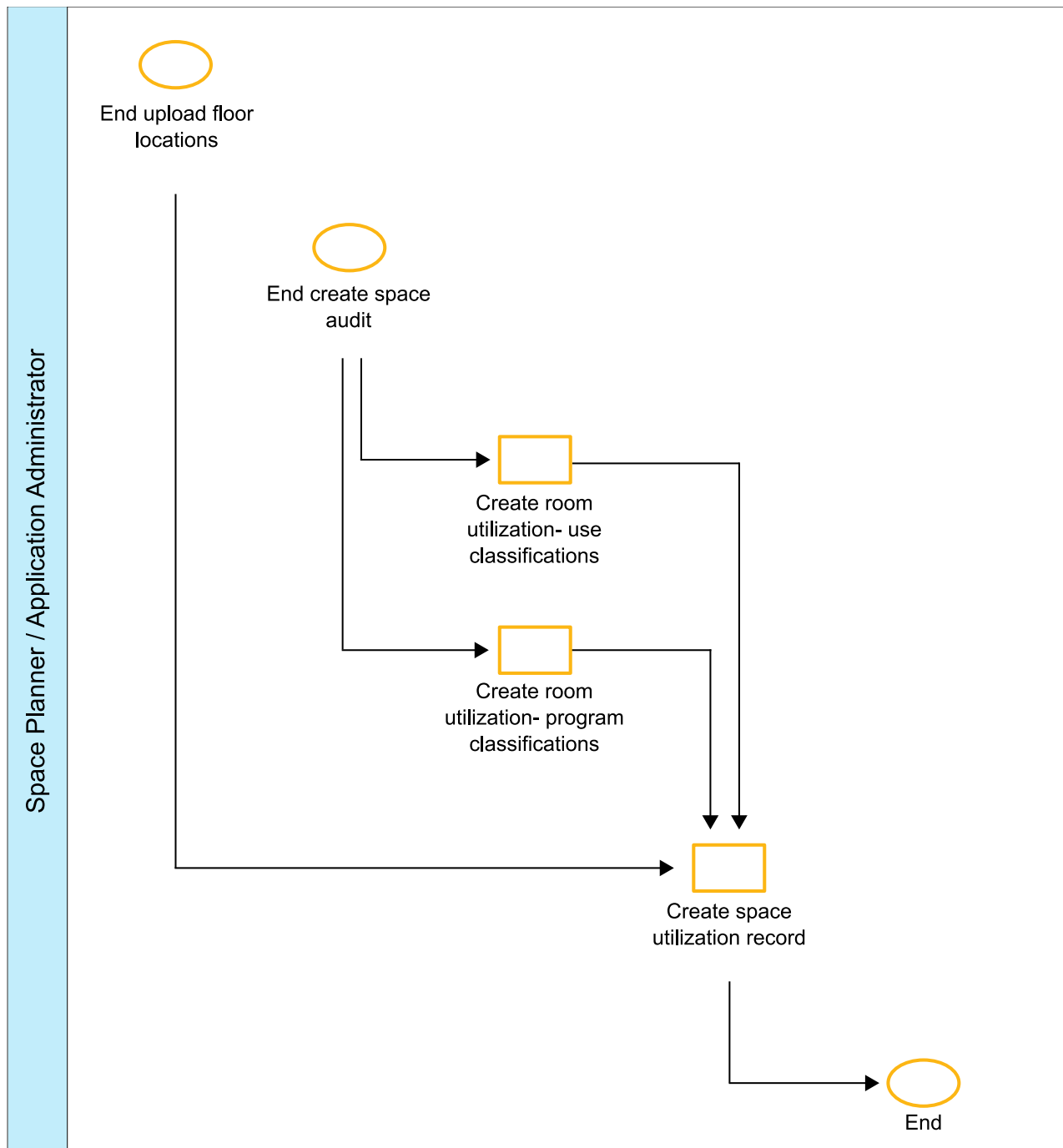


Figure 28. Create space utilization

Move setup

This flowchart describes the move setup process in TRIRIGA. This process includes adding or updating move type cost estimates, updating move policies, and updating space management settings.

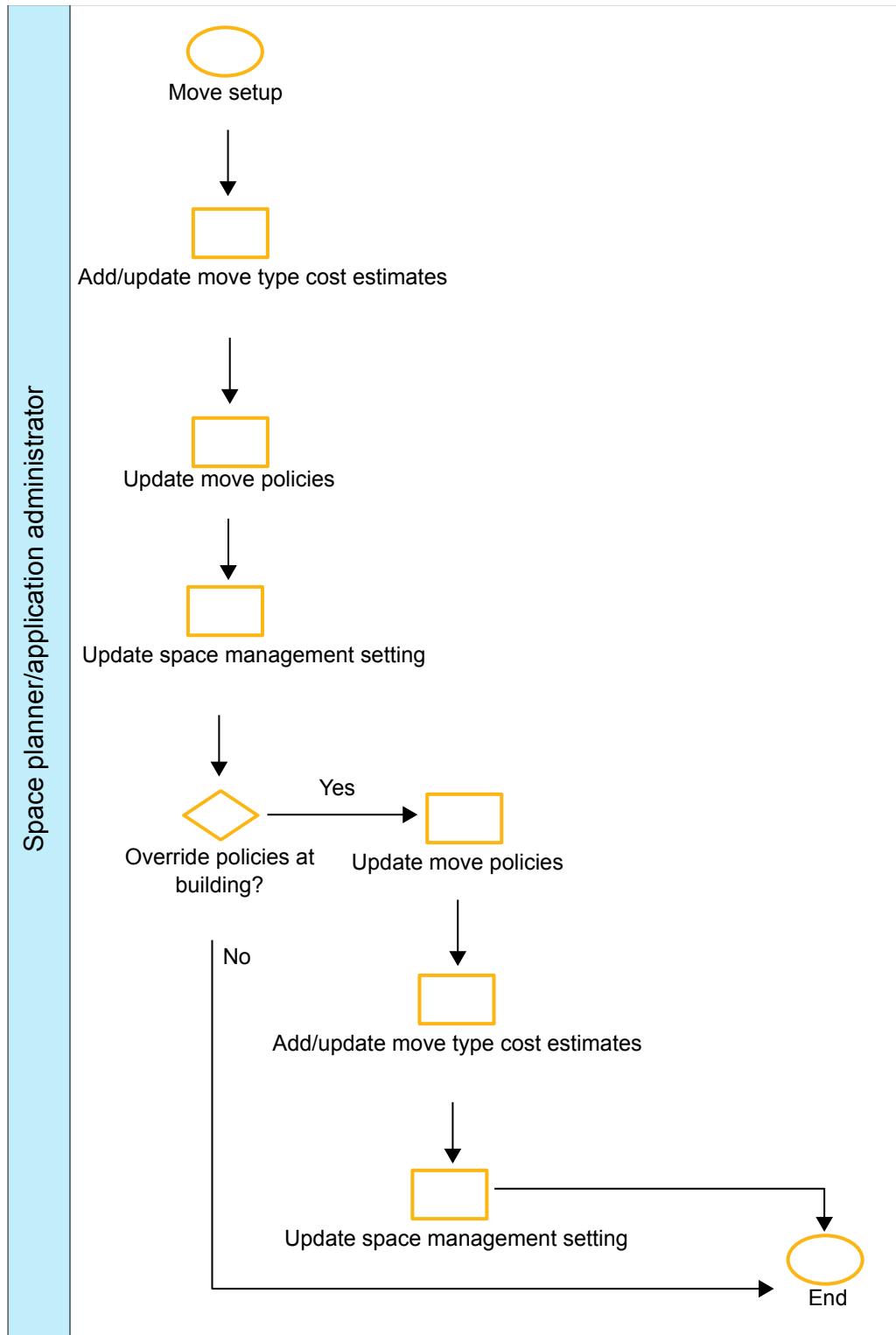


Figure 29. Move setup
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Chapter 3. Configuring prerequisite tasks

Before you can manage spaces and move requests for your organization, you must define space and move standards, functional role entitlements, and classify spaces. You must also define contact roles and create templates for move projects.

Space and move settings

To establish consistency for your space and move processes, you can define the move policy, the estimated cost of moves, and the setting for the space occupancy of your organization.

You can define the move policy of your organization to establish the default settings for moving people within your organizations. For example, when you move a person or room you can automatically include their assets and equipment. Also, you can ensure that moving requests are not self-service requests so that you can control the allocation of spaces. You can also adjust the chargeback or financial responsibility of the move.

You can define the estimated cost of a move that is based on the type of move. You can create different estimates that are based on different scenarios. For example, you can create a cost estimate for moving a person. You can create another cost estimate for moving a person with their assets.

You can also override the default settings for the move policy and move cost estimates at the building level.

Space management settings define the space occupancy policy for your organization. You can specify whether to manage occupancy allocations for spaces that are based on the organization of the people that are assigned to the spaces.

You can implement these global settings for space and move management by using the Application Settings form.

Classifying spaces

You classify a space to define how the space is used in a building, such as an office, warehouse, or workstation. Space classifications are applied to your portfolio for consistency and standardization.

Space classifications

Space classifications define the standards that are used to calculate the area measurements for spaces, such as gross area, rentable areas, and usable areas.

These standards are established by the International Facility Management Association (IFMA) and Building Owners and Managers Association (BOMA).

Note: IBM TRIRIGA supports the 1996 BOMA standard.

You can use the classification hierarchy to create a space class current record to define the utility of the space. In the space class current record, you can also

provide a logical grouping of the available space. After you specify the space classifications, you can assign them to the space records.

You can integrate computer-aided design (CAD) software with IBM TRIRIGA to create accurate space measurements and to view spaces in graphical format. You can also use the web-based interface to assign and review space classifications.

You can classify spaces into three different types to help you manage your spaces.

Space class current

The primary space classification where you can specify how the space is used, such as warehouse or storeroom. This classification defines the current use of space to calculate area measurements and allocate available spaces.

Space class designed

Defines the designed use of a specific space. You can apply this classification when a space is intended to be used for a specific purpose but is used for a different occupation. For example, when a space is designed as a workstation or office but is used as a storage area.

Space class planned

Defines the planned utilization of a space. For example, an office space that is currently used as a storage area, but the master plan shows the planned usage as a special purpose space.

Standards for space classifications

IBM TRIRIGA uses the standards for space classifications that are established by the International Facility Management Association (IFMA) and Building Owners and Managers Association (BOMA).

These standards are used to calculate the area measurements of buildings and spaces.

Note: IBM TRIRIGA supports the 1996 BOMA standard.

Space classification standards	Description
Exterior gross	The total floor space of a building, including unusable space or excluded areas, which is measured from the outside walls.
Interior gross	The total measured area that is calculated from the inner surface of the walls, including rentable areas, interior parking, vertical penetration, and void areas.
Building rentable	The area within the interior gross that includes the usable area and a prorated portion of the common areas on the entire office floor. This area does not include vertical penetration regions, such as elevators, stairs, or mechanical risers.
Usable area	The total area that can be occupied. The usable area on a specific floor of a building depends on the corridor configurations and whether the floor has single or multiple occupants.

Space classification standards	Description
Assignable area	The space that is assigned for a specific purpose, for example, cafeteria.
Exterior wall	The outer wall that surrounds the total interior gross.
Interior parking	The area within the interior gross that is available for parking. This area is allotted by dividing the total rentable square footage area of a building by the total parking space.
Vertical penetration	The vertical penetration regions within the interior gross include the elevators, stairs, atrium, and the other common areas.
Core building services	The regions within the building rentable area that are dedicated to providing maintenance and core services for the building or structure.

Workpoint setting

When you create a move line item (MLI) from a room, the workpoint setting determines whether the MLI moves the assigned person or the room function. The space class current record contains the workpoint setting.

If the room or space is a workpoint, then the MLI is created to move the assigned person. If the room or space is not a workpoint, then the MLI is created to move the room function.

The workpoint setting also determines whether child MLIs for asset or equipment moves are attached to the parent MLI for the person or room function move. Based on your application-wide or building-specific move policies, asset and equipment moves might or might not be automatically included with the person or room function move.

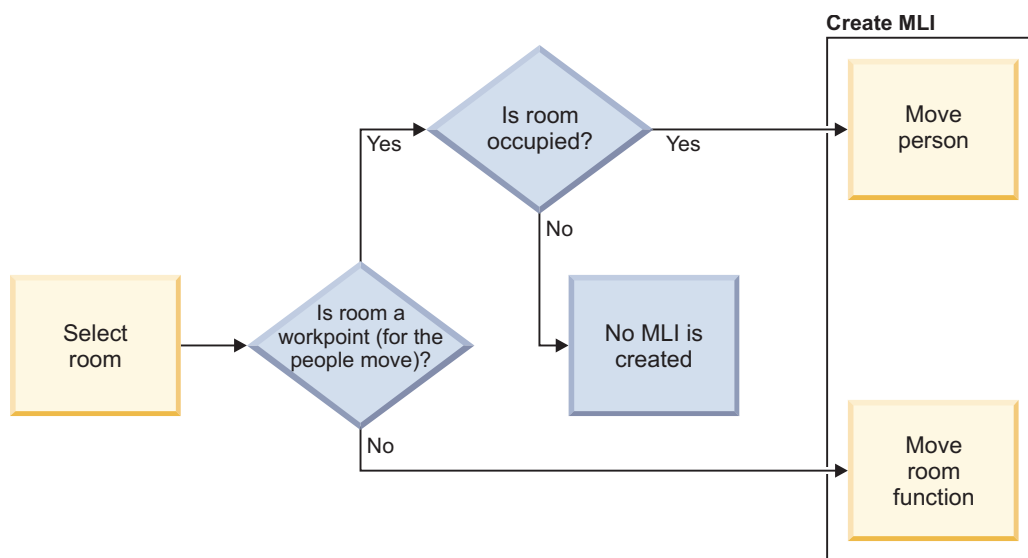


Figure 30. How the workpoint setting determines the creation of an MLI from a room

Creating space class current records

A space class current record defines how a space is used in a building and the standards that calculate the area measurements for spaces. After you create space class current records, you can associate them with space records to apply the classification standard to your portfolio.

Procedure

1. Select **Tools > Administration > Classifications**.
2. In the hierarchy panel, click **New** and select **Space Class Current**.
3. Specify the details of the space class current record.
4. Click **Create**.

Specifying entitlements for functional roles

Entitlements determine the type of spaces that each functional role is entitled to occupy. To specify entitlements for functional roles, you assign functional roles to employee records. You then create a space standard specification and associate the space standard with the space class.

Functional roles

A functional role describes a set of skills and activities that are typically performed by a department within an organization, for example, a manager, director, or vice president. Functional roles are defined by the organizational structure of a company. Resources are assigned to these roles within that department.

You specify the range of functional roles in the classification hierarchy for roles. After you create functional roles in the classification hierarchy, you can assign a functional role to a resource. Functional roles are also related to spaces.

During a move, the allocation of a space is based on functional role assignments and the entitlements that are associated with the functional role. The entitlement that is associated with the functional role determines the type and size of space that a person can move to.

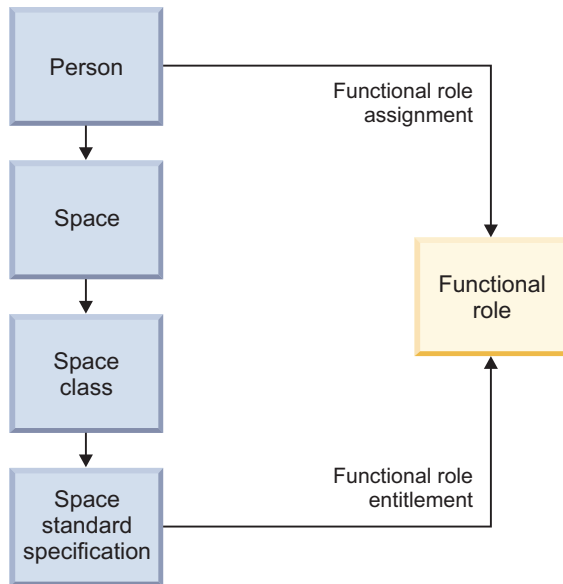


Figure 31. Functional role assignment and functional role entitlement

Assigning functional roles to employees

After the functional roles are created in the classification hierarchy, you can assign a functional role to an employee record. By assigning a functional role to a resource, you can allocate resources to spaces that they are entitled to.

Before you begin

Specify the range of functional roles in the classification hierarchy for roles.

Procedure

1. Select **Portfolio > People > Employees**.
2. Select an employee record. If you cannot modify the record, revise the record.
3. In the **Functional Role** field, select the role that you want to assign.
4. Activate the record.

What to do next

Create the space standard specification.

Creating space standard specifications

Specifications for space standards define the attributes of a space, including capacity, average area, and associated functional roles. You use a space standard specification to determine which functional roles are entitled to occupy particular types of spaces.

About this task

When you create a space standard specification, you associate a functional role as an entitlement for that specification. You then associate the space standard specification with the space class current classification.

Procedure

1. Select **Portfolio > Set Up > Specification > Space Standards**.
2. Create a space standard specification record.
3. Specify the space standard details for the specification and click **Create Draft**.
4. In the Entitlements section, specify the functional role that you want to associate as an entitlement and activate the record.
5. On the main menu, select **Tools > Administration > Classifications > Space Class Current**.
6. Select the space class current record that you want to associate with the space standard specification.
7. In the Details section, specify the space standard specification as the default space standard.
8. Save the space class current record.

Creating templates

Templates contain predefined data that you can use in records for consistency and accuracy. For space and move management, you create templates for move projects and surveys.

Creating templates for move projects

A move project provides details about the tasks that are performed for move requests. You can create a template for move projects to maintain consistency of the move details. For example, you can create a template that specifies the required tasks for the move and the cost codes.

Procedure

1. Select **Projects > Set Up > Project Template > Facilities Project**.
2. Specify the details of the template, such as scope, schedule, and budget.
3. Assign the contact roles for the move project.
4. Save the record.

Assigning contact roles to move projects

When you create a move project, you must specify the role of manager and move planner as contact roles. These contact roles can then approve and manage the move requests that are associated with the move project.

About this task

If you create a template for a move project, you can assign the contact roles to the template.

Procedure

1. Select **Space > Manage Moves**.
2. In the Move Project section, create a move project and specify the project details.
3. On the **Contacts** tab, specify the role of Manager as a contact role.
 - a. Specify the name of the person to be assigned and click **OK**.
 - b. Select the name of the person and specify the role of Manager.
 - c. Save the contact role record.

4. Specify a person to the role of Move Planner as a contact role.
5. Save the record.

Chapter 4. Managing spaces

After your spaces are properly set up and classified, you can manage your spaces through space associations, space audits, space utilization, and space use agreements. You can find the space management tools under **Space > Manage Space**. You can find the strategic facility planning tools under **Space > Plan Space**.

Overview of space management

In the IBM TRIRIGA application, the management of spaces includes associating spaces to other records, auditing spaces, tracking the use of spaces, and maintaining space use agreements.

Space management roles

The space manager is responsible for tracking the allocations, assignments, and utilization of the spaces within a facility as determined by space use agreements. Meanwhile, the space planner is responsible for monitoring the costs and utilization of the spaces at the strategic portfolio level across multiple facilities. Depending on the organization, these roles might be held by the same person or by many people.

Space associations

A space association is a type of relationship between the space record and the associated record. Space associations include space allocations and space assignments.

Space audits

A space audit is a snapshot or capture of the space details in a building or structure to evaluate the accuracy, efficiency, and utility of spaces. You can conduct space audits regularly to track and compare space allocations, space usage, and space costs over time.

Space utilization

Space utilization is the efficient use of a space. You can track the use of a space by attaching space utilization records, and by conducting space audits regularly.

Space use agreements

A space use agreement (SUA) is an agreement between two parties, such as a landlord and tenant organization, about the use and cost of the space. In real estate leases and owned property agreements, you can use SUAs to define the internal arrangements with the organizations that are assigned to the space.

Space associations

A space association is a type of relationship between the space record and the associated record. Space associations include space allocations and space assignments. A space allocation is an association between a space record and one or more organization records. A space assignment is an association between a person or asset record and one or more space records.

In the IBM TRIRIGA application, an association is a link that provides a particular relationship between two business objects. Business objects represent resources such as people, assets, locations, organizations, and geography. When the application generates records from these associated business objects, the

corresponding records inherit the same association. Location business objects include many types such as building, floor, and space business objects. A space association is a type of relationship between the space business object or record and the associated business object or record.

Space associations include the following examples:

- A person or asset might be associated to only one primary location or space, but might be associated to many secondary locations or spaces.
- An organization might have several different associations to the same location or space as Primary Organization, Charge To Organization, and Uses Organization.
- A location or space might have only one association to a geography.

The following figure shows the associations among the different business objects in IBM TRIRIGA.

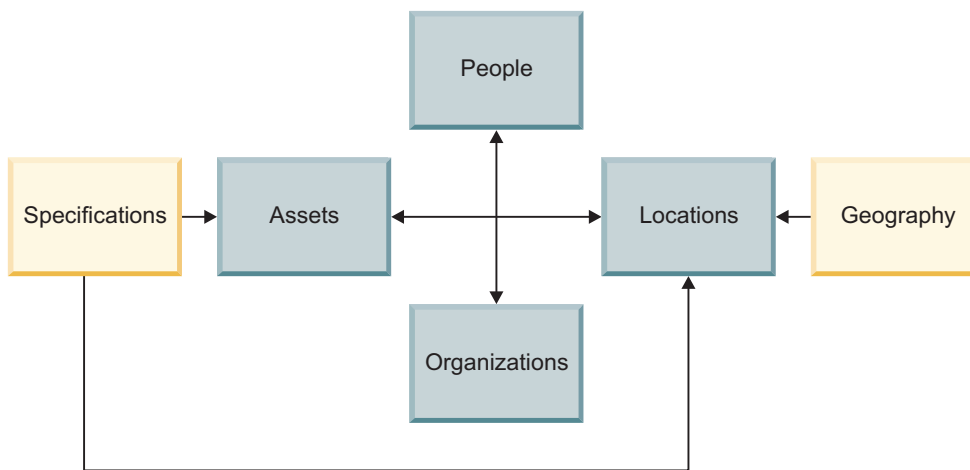


Figure 32. Associations among the different business objects in IBM TRIRIGA

Space allocations

A space allocation is a type of space association between a space record and one or more organization records. You can use space allocations to track the prorated arrangement of organizations that are financially responsible for the space or area. The IBM TRIRIGA application supports both room-level and floor-level space allocations to organizations. In other words, you can allocate an entire floor to a single department, or you can allocate specific spaces within the floor to many different departments. The space allocation process is the simple process of associating or de-associating an organization from the space or area.

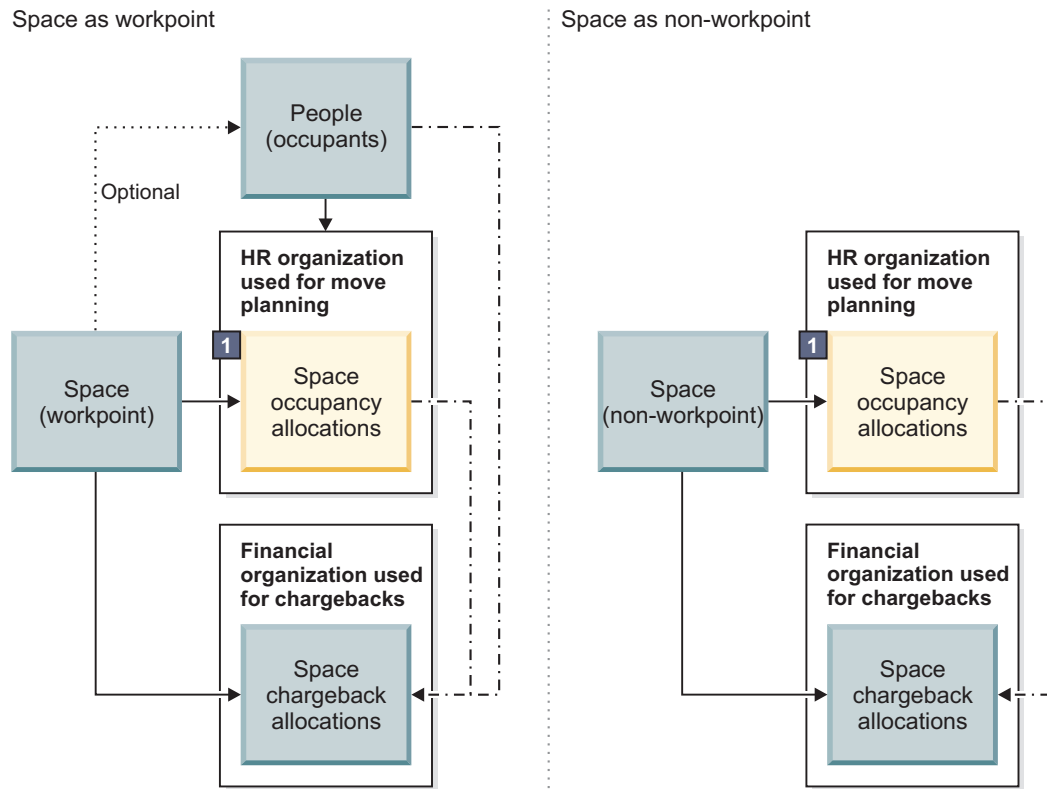
Space-level allocations

A space-level allocation is a room-level association to one or more organizations. Adding or removing an association triggers the application to archive any currently active allocation records and to generate a new space level allocation record for each associated organization. With this process, the application reallocates 100% of the space in the space record evenly across all of the associated organizations.

Sometimes, the actual or human resource organization that is occupying the space is not the same as the chargeback or financial organization that is responsible for

the space. The space occupancy allocation gives companies the flexibility to set different organizations for occupancy and financial responsibility for the space.

The following figure shows the difference between space occupancy allocations and space chargeback allocations.



--- Optional sync based on application-wide or building-level business rule

1 Space occupancy allocations - adds flexibility for companies which do not always set chargeback organizations (financial orgs) equal to the actual organizations occupying the space (HR orgs).

Figure 33. Space occupancy allocations versus space chargeback allocations

Area-level allocations

An area-level allocation is a floor-level association to one or more organizations. Adding or removing an association triggers the application to archive any currently active allocation records and to generate a new area level allocation record for each associated organization. With this process, the application reallocates 100% of the area in the area overlay record evenly across all of the associated organizations.

Space assignments

A space assignment is a type of space association between a person or asset record and one or more space records. A person can be associated to only one primary location or space, but can be associated to many secondary locations or spaces. In addition, multiple people can share one space, and each person can define the same space as the primary or secondary space. The space assignment can be defined from the person record, space record, or computer-aided design drawing with IBM TRIRIGA CAD Integrator/Publisher.

Similarly, an asset can be associated to only one primary location or space and to only one person. The space assignment can be defined from the asset record, space record, or computer-aided design drawing with IBM TRIRIGA CAD Integrator/Publisher. Meanwhile, the person assignment can be defined from the asset record only.

Space audits

A space audit is a snapshot or capture of the space details in a building or structure to evaluate the accuracy, efficiency, and utility of spaces. You can conduct space audits regularly to track and compare space allocations, space usage, and space costs over time.

Space audits can be used for the following evaluations:

- Estimating the accuracy of the building layout and floor plans.
- Improving the utility area of the space to reduce leasing or renting costs.
- Enhancing the utility of extra space as storage areas or parking lots.
- Organizing the arrangement of furniture and equipment in the space.
- Tracking the prorated space allocations and costs to organizations over time.

Space allocation process and space audit process

The space allocation process is the simple process of associating or de-associating an organization from the space. Adding or removing an association triggers the application to archive any currently active allocation records and to generate a new space level allocation record for each associated organization. With this process, the application reallocates 100% of the space in the space record evenly across all of the associated organizations.

Following the space allocation process, the space audit process captures the details of the allocated space and records the details of the space audit. The following figure shows how the space allocation process flows into the space audit process.

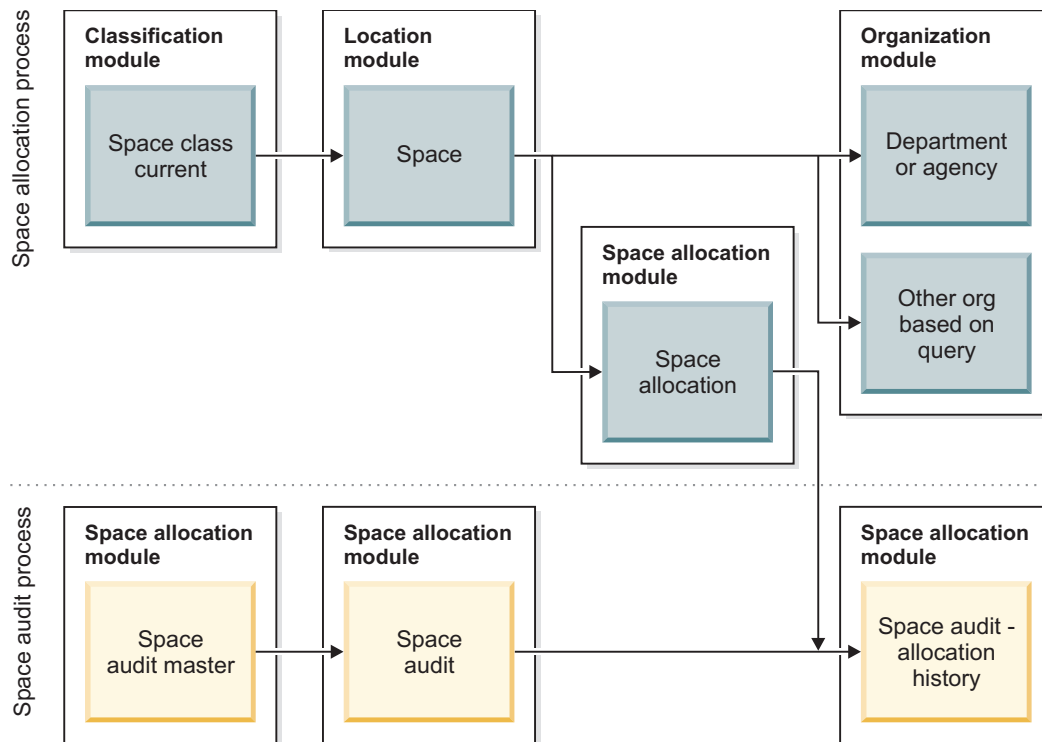


Figure 34. Space allocation process and space audit process

Space audit process

The space audit process consists of five steps. The application does not support area-level audits.

1. Pre-audit review: When the process begins, you must verify that all affected floor and space records are in the "Active" state, not "Draft" or "Revision in Progress" state. You can validate that all space allocations to organizations are correct before the audit, or wait to validate until step 4, or do both.
2. Select the building and floors: To select the building and floors for the audit, you must create the space audit master record. This information includes the space audit period, space audit process to be used, buildings to be audited, and floors to be audited within each building. When your information is ready to be submitted, activate the record.
3. Audit is processed: After the space audit master record is activated, the application processes the information. Only "Active" floors in "Active" spaces are processed. Any records in the "Draft" or "Revision in Progress" state are not processed.
 - If you selected active space allocation, the space audit process evaluates allocated spaces only, calculates chargeback amounts only, and generates the space allocation history records. As a result, this method is faster.
 - If you did not select active space allocation, the space audit process evaluates all spaces, calculates chargeback amounts, and calculates prorated areas. The process also generates the space audit records and space allocation history records. As a result, this method takes longer.
4. Review the audit: After the space audit process ends, you can review the generated records from the space audit master record. You can also validate that all space allocations to organizations are correct.

5. Close or remove the audit: After your review ends, you can close the audit period or remove the space audit master record.
 - If you close the audit period, the space audit master, space audit, and space allocation history records are moved to a read-only "History" state.
 - If you remove the space audit master record, the space audit master, space audit, and space allocation history records are deleted.

The following figure shows the space audit process from the pre-audit review to the close or removal of the space audit records.

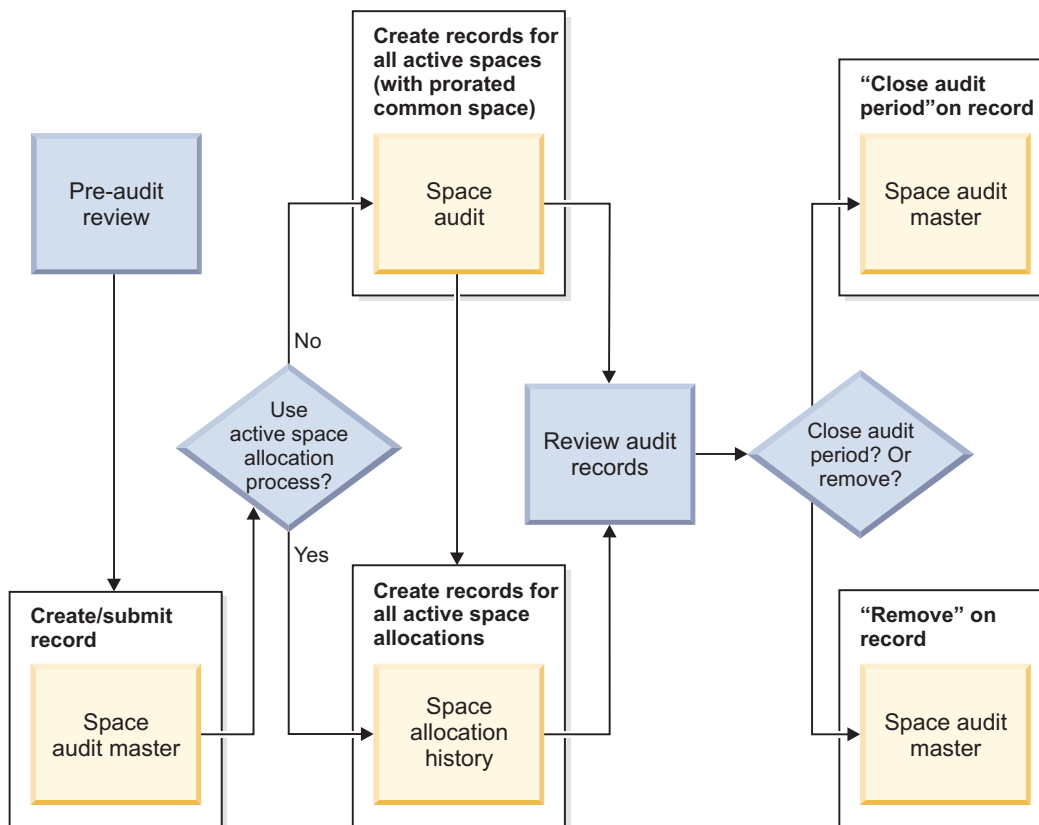


Figure 35. Space audit process

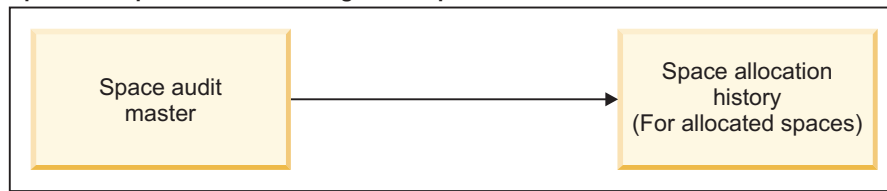
Active versus non-active space allocation

If you selected active space allocation in the space audit master record, the space audit process evaluates allocated spaces only. For each space level allocation record that is in the "Active" state, a space audit allocation history record is created. Finally, each new space audit allocation history record is associated to, and listed in, the space audit master record that activated the audit process.

If you did not select active space allocation in the space audit master record, the space audit process evaluates all spaces. For each space within the floor, a space audit record is created. For each new space audit record, a list of space allocations is retrieved for the related space. Next, for each space allocation, a space audit allocation history record is created and associated to the new space audit record. Finally, the new space audit records are listed in the space audit master record that activated the audit process.

The following figure shows the difference between active and non-active space allocation.

Space audit process - when using active space allocation



Space audit process - when not using active space allocation

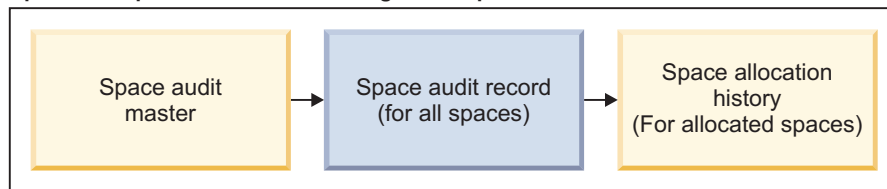


Figure 36. Active versus non-active space allocation

Associating spaces

You can allocate a space or area to one or more organizations. You can also assign a person or asset to one or more spaces.

Allocating spaces to organizations

You can track the prorated arrangement of organizations that are financially responsible for the space by using space-level allocations.

Procedure

1. Open a space record. If its status is Active, select the **Revise** action.
2. On the **Allocation** tab, in the Chargeback Allocations section, find and select one or more organizations that are financially responsible for the space.
3. In the Occupancy Allocations section, if the organizations are different from the chargeback organizations, find and select one or more organizations that are occupying the space.
4. Save or activate the record. The application generates a new space level allocation record for each associated organization.

Allocating areas to organizations

You can track the prorated arrangement of organizations that are financially responsible for the area by using area-level allocations.

Procedure

1. Open a floor record. If its status is Active, select the **Revise** action.
2. On the **Allocation** tab, in the Area Overlays section, add or open an area overlay record.
3. In the Organization Charged section, find and select one or more organizations that are financially responsible for the area.
4. Save or activate the record. The application generates a new area level allocation record for each associated organization.

Assigning people to spaces from the people record

You can track the locations of people and the occupancy of the space by using space assignments.

Procedure

1. Open a people record such as an employee. If its status is Active, select the **Revise** action.
2. On the **Locations & Assets** tab, in the Primary Location section, find and select one space.
3. In the Other Assigned Locations section, find and select one or more secondary spaces.
4. Save or activate the record.

Assigning assets to spaces

You can track the locations of assets such as furniture and equipment by using space assignments.

Procedure

1. Open an asset record such as furniture. If its status is Active, select the **Revise** action.
2. In the Details section, select a primary location.
3. In the Asset Status section, select the **Assign** action.
4. Specify the details, find and select one person, and select the **Continue** action.
5. Save or activate the record.

Planning spaces

After you define your planning environment and portfolio plans in IBM TRIRIGA Strategic Facility Planning, you can plan your spaces by using space plans. In the space plan, you can build and compare different scenarios. You can find the space planning tools under **Space > Plan Space**.

Chapter 5. Managing moves

After your spaces, functional roles, and other move settings are set up, you can manage your moves through move requests, move planning, and strategic facility planning. You can find the move management tools under **Space > Plan Moves** and **Space > Manage Moves**.

Overview of move management

In the IBM TRIRIGA application, the management of moves includes managing move service requests, planning scheduled moves, and planning strategic moves.

Move management roles

The move manager is responsible for moving people, assets, and equipment within an organization to ensure that move requests and move projects are implemented as required. Meanwhile, the move planner is responsible for assembling move projects so that strategic space plans or facility move plans are organized with minimal cost and disruption. Depending on the organization, these roles might be held by the same person or by many people.

Move requests

Similar to a typical service request, a move request follows the service management process. The move request is submitted by the requester, assigned to a move task or move project, and completed when the move is completed. In this process, move planning is not necessarily involved and the move manager plays a central role in managing the move request.

Move planning

Unlike the service management process, the move planning process can reassign a move request to a different move task or move project. In this process, the move planner plays a central role in creating move line items from the move requests, and assembling the items into move projects. The move manager might also have a role in approving the move project or marking the project as completed.

Strategic facility planning

The strategic planning process begins with IBM TRIRIGA Strategic Facility Planning. In this process, the space planner plays a central role in preparing the planning environment, portfolio plans, and space plans. For each space plan, the space planner can create and compare different space scenarios. The space planner can also assign approved scenarios to a specific move planner. Similar to the move planning process, the move planner can create move line items from a specific scenario, and assemble the items into move projects.

The following figure shows the initiation of the move management process, and the difference between the move planning process and the move request process.

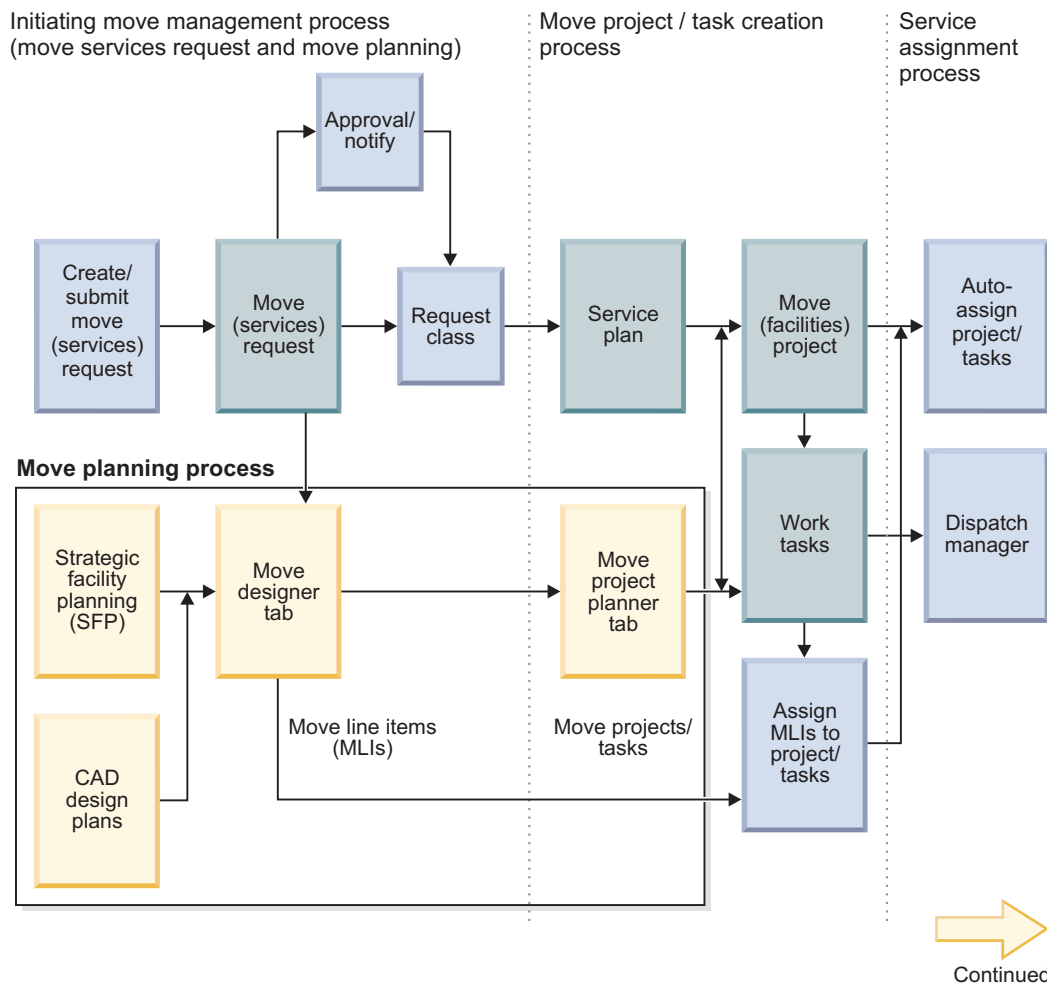


Figure 37. Initiation of the move management process

The following figure shows the completion of the move management process.

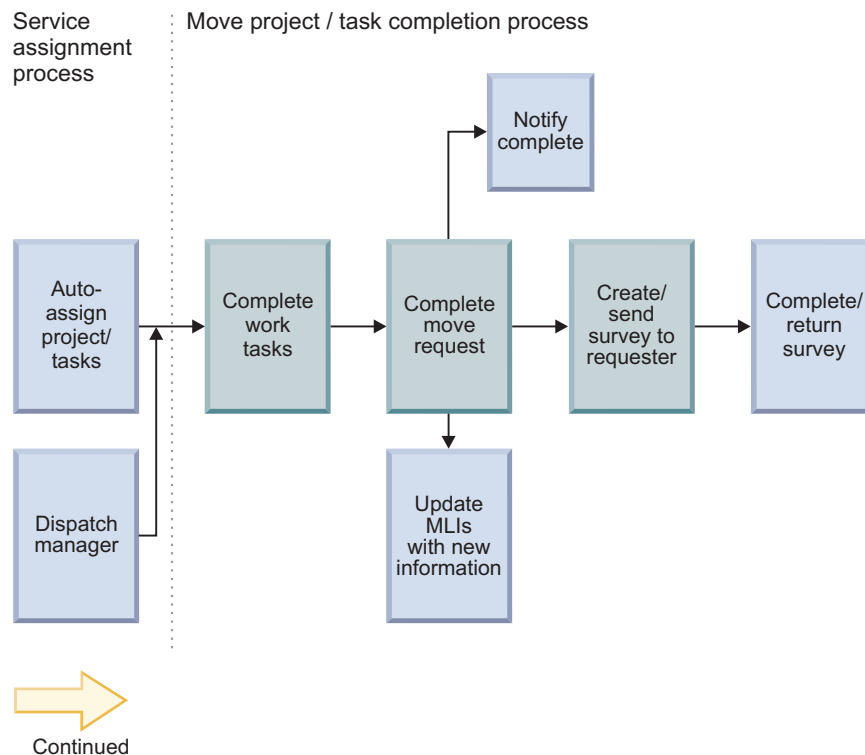


Figure 38. Completion of the move management process

Managing move requests

Many organizations manage their move requests by planning move projects on a regular schedule. But sometimes a move request must be managed on an individual basis. One example is a move request that results from a defect that is discovered in the workspace.

Scenario: Managing an emergency move request

Because of a faulty power supply in her office space at Company ABC, Patricia must move to a different office space immediately. Patricia creates a move request, which must be approved by her manager before it is routed to the move manager that manages the move process.

Background

Most moves at Company ABC headquarters are managed on a monthly schedule. But Millicent, the move manager at Company ABC, processes emergency move requests on an individual basis to minimize the disruption that is caused by an emergency.

At Company ABC, all employees can create self-service move requests. If they want a request to be given immediate attention, they must specify that the reason for the move is an emergency. When employees submit move requests, the requests are routed automatically to their managers for approval. After the requests are approved, Millicent receives and reviews the requests, assigns resources to new locations, and arranges for the physical move work to be conducted.

Step 1: Create a move request

In the application, Patricia creates a move request. Information about her organization and current location are automatically populated in the request, and Patricia checks that the information is correct. She specifies the individual move request type and selects the emergency move option. Patricia adds information about the power supply issue and includes her computer, telephone, and furniture information before she submits the request.

Step 2: Approve the move request

Jean, Patricia's manager, receives an action item on her home portal to approve Patricia's move request. She opens the move request so that she can review the details before she approves it. After approval, the request is automatically forwarded to Millicent.

Step 3: Assign a person to a new location

When Millicent receives the approved move request, she reviews the details before she decides what action to take. Because it is an emergency move, and the next planned move cycle for Patricia's building is too far in the future, an individual move is necessary.

Since Patricia is not moving to a different department, Millicent decides to move her to a vacant space that is next to her existing office space. In the application, Millicent confirms that Patricia's functional role is entitled to that space.

From the Space Manager form, Millicent specifies Patricia's building and floor, and specifies Patricia as the person to move. Millicent identifies a suitable vacant space on the floor plan, and assigns Patricia to this new space.

Step 4: Create a work task for the move

From the Move Designer form, Millicent selects the emergency move task template, selects Patricia's move line item, and adds the item to a new move task. Millicent reviews the details and adds information that includes the planned completion time and the number of boxes to move. The move task is dispatched to the facilities team that conducts the physical moves.

Step 5: Perform the move work

Lee manages the facilities team and accepts the task that Millicent created in response to Patricia's emergency move request. In the application, Lee specifies that work is started when the move begins and specifies that the work is stopped when the move is completed. The actual time that is spent on the move is recorded in the move task record. When the move is completed, Lee closes out the move task.

Step 6: Complete the move request

When the move work is completed, Millicent returns to the Move Designer form and closes out the move line item. When the move line item is closed out, the move request is also marked as completed. Patricia receives a notification that the move request is completed. Later, Patricia receives an evaluation survey so that she can provide feedback on the move.

Creating move requests

A move request can apply to an individual person but can also include the person's assets, such as computer, telephone, and furniture. The move request must include information about the location from which the person is moving and the organization that is responsible for the location. When you submit a move request, a series of automatic and manual activities are initiated that are managed by the move manager.

About this task

You must have appropriate permission to create a move request. Permission to create self-service requests depends on how IBM TRIRIGA is implemented at your company.

Procedure

1. Select **Requests > My Requests**.
2. From the Request Central section, click **Space > Move Request**.
3. Specify whether the request is for yourself or for someone else.
4. In the Move Details section, check that the required information is correct.
5. In the Service Request section, select **Individual Move**.
6. Optional: Provide information as necessary in other sections. You can find and select locations or assets that are associated with the person record.
7. Submit the request.

Results

After you submit the move request, it is routed through the standard approval process that your company requires. After the move request is approved, it is sent to the move manager for processing.

Assigning people to spaces

After you receive a move request, you can assign the person and any associated assets to the new location. The assignment ensures that the occupancy information for the affected locations is up-to-date.

Procedure

1. Select **Space > Manage Space > Space Manager**.
2. For the action, select **Assign Person**.
3. In the Location of the Space section, specify the building and floor to which the person is moving.
4. Select the person that you want to assign to a new space.
5. In the floor plan graphic, locate a suitable space for the person.
6. Select the new space and click **Assign Person**.

Creating move work tasks

A move work task is associated to the move line item record that contains the details of the move. Depending on the applied task template, a move work task includes more information, such as the planned start date and estimated costs. After you create a move work task, a member of the move team can accept the task and start work on the move.

Procedure

1. Select **Space > Plan Moves**.
2. From the **Move Designer** tab, select the **Show All MLI** check box.
3. In the All Move Line Items section, click **Add to Project/Task**.
4. For your assignment option, select **Add to New Task**.
5. For your task template, select the work task template to apply.
6. Specify the name of the move work task. You can use this name to filter for the work task after you assign it.
7. Select the move line items that you want to assign to the task and click **Assign**.
8. Optional: In the **Tasks > Manage Tasks > Work Task** page, open the move work task to review the information or add any necessary details.

Results

After you create the move work task, the move team can accept the task, record when work starts and ends, and mark the task as completed.

Closing move line items

When a member of the move team completes the work on a work task, you close the move line item. Closing a parent move line item such as a person or room function also closes its associated child items such as an asset or equipment.

Procedure

1. Select **Space > Plan Moves**.
2. From the **Move Designer** tab, select the **Show All MLI** check box.
3. In the All Move Line Items section, click **Close-Out**.
4. Select the move line items that you want to close and click **Close-Out**.
5. When you are finished, click **Done**.

Results

When you close a move line item, the status of the associated move request changes to Completed and the requester is notified.

What to do next

After a move task is completed, surveys are used to gauge the level of satisfaction with the move service. Survey results can be used to improve the move procedures or the quality of the move service.

Planning scheduled moves

Many organizations manage their move requests by planning move projects on a regular schedule. One example is a move project that assembles several move requests during the last month.

Scenario: Planning a scheduled move

Most moves at Company ABC headquarters are planned on a monthly schedule. Except for emergency move requests, all other individual and group move requests are reviewed by the move planner during this monthly move cycle. After the move planner assembles the move project, the move manager approves the project so that the facilities team can begin the move work.

Background

Paulina, the move planner at Company ABC, manages move requests in groups on a scheduled basis. Every month, Paulina creates a move project, adds move line items to the project, adds work tasks to the project, and schedules the project. Paulina coordinates with Millicent, the move manager at Company ABC, and the facilities team for the physical move work to be conducted.

Step 1: Create a move project

In the application, Paulina creates a move project. To save time, she applies a predefined move project template to the move project. Information about the scope, schedule, and budget are automatically applied to the move project, and Paulina checks that the information is correct or refines the details.

Paulina checks that the contact roles from the move project template are still accurate. She adds another contact role for a new member of the facilities team. She confirms that there is exactly one contact role of manager, in this case, Millicent. Paulina also confirms that she is still set as the move planner so she can access and update the move project.

Step 2: Assign resources to new locations

This month, Paulina finds several individual and group move requests that involve 10 employees and their associated assets and equipment. In the application, she confirms that a space is available for each employee and that the functional role of each employee is entitled to that space.

From the Space Manager form, Paulina proceeds to assign the 10 employees and their assets to their new spaces. For each employee, she specifies the building and floor, selects the employee, and assigns the employee to the new space. Similarly, for each asset, she specifies the building and floor, selects the asset, and assigns the asset to the new space.

Step 3: Assign move line items and work tasks to the project

From the Move Designer form, Paulina creates the move line items for the 10 employees and their assets and adds the items to the move project.

From the Move Project Planner form, Paulina opens the move project. She finds the move work tasks that were applied to this project from the move project template. These work tasks include cleaning the vacated spaces and moving the name plates. Paulina decides to add a work task to install new phone sets in the assigned spaces, and adds the task to the move project.

For one of the group move requests, Paulina remembers to group five employees together and to schedule their moves together. She adds a separate work task that groups the five employees and their assets, and assigns the corresponding move line items to this separate work task. Then, she adds this task to the move project.

Paulina reviews the details and adds information that includes the planned completion time and the number of boxes to move.

Step 4: Schedule the move project

From the Move Project Planner form, Paulina loads the move project into the Gantt scheduler so she can see a graphical representation of the move schedule. She selects the move project so she can also see the work tasks in their own Gantt scheduler. Although the work task to clean the vacated spaces were added from the move project template, Paulina must adjust the planned dates for the current month. Similarly, she adjusts the planned dates to move the name plates.

For the separate work task that groups five employees, Paulina adds a task dependency so that this move is the first move in the schedule.

Again, Paulina opens the move project to review other scheduling details and requirements. When Paulina is ready, she submits the move project and the project is routed automatically to Millicent for her approval as the move manager. After Millicent approves the move project, the project and its associated tasks are dispatched to the facilities team that conducts the physical moves.

Step 5: Perform the move work

Lee manages the facilities team and accepts the move project that Paulina created for the monthly move cycle. In the application, Lee specifies that work is started when the move begins and specifies that the work is stopped when the move is completed. The actual time that is spent on the move is recorded in the move task records. When the move is completed, Lee closes out the move tasks.

Step 6: Track project performance

Meanwhile, as the facilities team conducts the move, both Paulina and Millicent follow the move project by tracking its performance metrics from their home portals. The performance metrics include the move cost per employee, and the churn rate of the number of moved employees versus the total number of employees.

Step 7: Complete the move project

When the move work is completed, Paulina returns to the Move Project Planner form, opens the move project, and marks it as completed. When the move project is completed, the associated move line items are automatically closed out and the associated move requests are automatically completed. For each of the move requests that were involved in the move project, the requester receives a notification that the move request is completed. Later, each of the requesters receives an evaluation survey so that they can provide feedback on the move.

Creating move projects

A move project is associated to one or more move line item records that contain the details of the move. Depending on the applied project template, a move project includes more information, such as the planned start date and estimated costs. After you create the move project, you can schedule the project.

Procedure

1. Select **Space > Manage Moves**.
2. From the **Move Project Planner** tab, in the Move Projects section, click **Add**.
3. Specify the name, service plan, work class, and other details of the move project.

4. In the **Contacts** tab, add the necessary contact roles or assign people to the contact roles. The move project must have exactly one contact role of **Manager**. To view your own assigned move projects, you must be assigned with a contact role such as **Manager** or **Move Planner**.
5. In the **Scope** tab, optionally add or find and select the move line items that you want to assign to the project.
6. In the **Schedule** tab, add or find and select the move work tasks that you want to add to the project. You can use the Gantt scheduler in the Project Tasks Gantt section or the Project Tasks section to add tasks.
7. Create the draft.
8. In the new move project, select **More > Apply Template** to apply the predefined move project template.

Results

After you create the move project, you can specify or edit the project schedule.

Scheduling move projects

After you create the move project, you can load the project into the Gantt Scheduler. You can also load the move tasks of that project into its own Gantt Scheduler. After you schedule and activate the move project and its associated move tasks, the move team can accept the project and start work on the move.

Procedure

1. Select **Space > Manage Moves**.
2. From the **Move Project Planner** tab, in the Move Projects section, select the check boxes for one or more projects and click **Load Schedule**.
3. In the Move Projects Schedule section, select a move project. The associated move tasks for the selected move project are shown in the Move Project Tasks section.
4. In the Move Project Tasks section, add any necessary work tasks.
 - a. Select **Work Task**.
 - b. Drag to create a move task that is represented by a colored box. Save the section.
 - c. To edit the move task duration, right-click in a blank area and select **Select Mode**. Drag one end of the colored box to shorten or lengthen the duration. Save the section.
 - d. To edit the move task record, double-click the colored box. Set the task type to **Move** and specify any other task details. Save the record.
 - e. To add a task dependency, right-click in the blank area and select **Create Mode**. Drag a colored line from the start or finish of one task to the start or finish of another task. Save the section.
5. Optional: In the Move Projects section, open the move project.
 - a. In the **Schedule** tab, specify or edit any scheduling details.
 - b. Add or find and select the move work tasks that you want to add to the project.
6. When you are finished, activate the move project.

Results

After you schedule and activate the move project, the move team can accept the move tasks, record when work starts and ends, and mark the tasks as completed.

Planning strategic moves

Many organizations manage their move requests by planning move projects on a regular schedule. But sometimes a move project is initiated, not at the facility level, but at the strategic portfolio level. One example is a move project that results from the approved scenario of a space plan in IBM TRIRIGA Strategic Facility Planning.

Scenario: Planning a departmental move

Most moves at Company ABC headquarters are the result of facility-level move requests. However, next month, the executive team plans to move the call center department from one facility to another facility. The strategic space planner assigns the approved space scenario to a specific move planner. Then, the move planner creates the move line items from the space scenario, and assembles the items into a move project.

Background

Steven is the strategic space planner at Company ABC. Six months ago, he is given the task of evaluating different space scenarios to address the space needs of their expanding call center department. By applying the existing planning environment, portfolio plans, and space plans in the IBM TRIRIGA Strategic Facility Planning application, Steven creates a new space plan. In the space plan, he creates and compares different space scenarios. After several months of evaluations by the executive team and facilities teams, a space scenario is approved.

Steven assigns the approved scenario to Paulina, the move planner at Company ABC. Paulina coordinates with Millicent, the move manager at Company ABC, and the facilities team for the physical move work to be conducted.

Steps

After Steven assigns the approved scenario to her, Paulina creates a move project. The steps that she follows for planning a departmental move are similar to the steps for planning a scheduled move. Paulina takes the following steps:

- Step 1: Create a move project
- Step 2: Assign resources to new locations
- Step 3: Assign move line items and work tasks to the project
- Step 4: Schedule the move project
- Step 5: Perform the move work
- Step 6: Track project performance
- Step 7: Complete the move project

Requesting design changes

During the space planning or move planning process, changes might occur to the design of a space, set of spaces, or floor plan. As a move planner, you can submit a request to modify a computer-aided design (CAD) drawing. The interior designer or CAD designer receives the request, updates the design, and publishes the updated planning drawing.

Procedure

1. Select **Space > Plan Moves**.
2. From the **Move Designer** tab, select the **Design Change Requests** tab and click **Add**.
3. In the new request, specify the details of the design change.
4. In the **Contacts** section, add the necessary contact roles or assign people to the contact roles. The design change request must have exactly one contact role of **Interior Designer**.
5. Create the draft.
6. When you are finished, submit the request.

Results

After the interior designer or CAD designer completes the request, you can return to the **Design Change Requests** tab to select the request and view the design options. Each design option contains an updated planning drawing.

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