



# **JLLT IBM TRIRIGA & Maximo**

Training Catalog





## **Training Toward Success**

JLL's Training Academy provides instructional courses that focus on the ins-and-outs of IBM TRIRIGA and Maximo. As an accredited IBM Business Partner, with decades of implementation experience, we know what it takes to help our customers succeed on these platforms. Through our Training Academy, we help our students quickly scale the learning curve and get immediate value out of IBM TRIRIGA and Maximo.



## **IBM TRIRIGA Training Catalog**

JLL provides the industry's most comprehensive Catalog of IBM TRIRIGA training courses. These courses enable users to address both the technical and functional needs of the IBM TRIRIGA platform. With our technical courses, students will understand how to properly configure and customize the tool to meet company needs. Through our functional courses, users learn to get the most from IBM TRIRIGA, increasing their company's operational, financial and environmental performance.



### 1. Intro to TRIRIGA

**Difficulty Level:** Beginner

**On-site Duration:** 1 day

**Description:**

This course is designed to familiarize new users with the most basic IBM TRIRIGA concepts including navigation, menu, personalization, and quick links. This course also provides information about leveraging the portfolio elements as a connection point between the other applications. Portfolio elements include Locations, Geographies, Organizations, People, and Assets.

**Topics:**

- Introduction to IBM TRIRIGA
- Portfolio Overview
- Organizations
- Geographies
- Locations
- Specifications
- Assets
- People

### 2. TRIRIGA Real Estate Lease Administration

**Difficulty Level:** Intermediate

**On-site Duration:** 3 days

**Description:**

This course is designed to educate participants about the IBM TRIRIGA Real Estate Manager module including abstracting leases using offline forms or the OSCRE interface, setting up critical lease dates, setting up lease options and clauses, managing payment schedules, payments and managing lease lifecycles and amendments.

**Topics:**

- Real Estate Contracts
- Real Estate Contract Setup
- Lease Abstraction
- Contract Management
- Contract Adjustments
- Invoicing
- Contract Revisions

### 3. TRIRIGA Real Estate Transaction Management

**Difficulty Level:** Intermediate

**On-site Duration:** 2 days

**Description:**

This course is designed to educate participants about the IBM TRIRIGA Real Estate Manager module including the Planning and execution of Lease Transactions. We will cover the analysis and decision process available.

**Topics:**

- Real Estate Transaction Overview
- Transaction Management Setup
- Portfolio Planning
- Real Estate Projects
- Task Completion
- RE Transaction Requests

### 4. TRIRIGA Capital Projects

**Difficulty Level:** Intermediate

**On-site Duration:** 3 days

**Description:**

This course is designed to educate participants about the IBM TRIRIGA Capital Projects module, which manages the entire lifecycle of capital projects including project initiation, cost code set up, programs, funding sources, budgets, procurement and bidding process, task management, and the day-to-day tracking and closure of projects.

**Topics:**

- Capital Project Overview
- Capital Projects Setup
- Programs & Funding
- Project Budgets
- Project Schedules
- Project Submittals
- Procurement & Bids
- Project Performance & Reporting
- Invoicing
- Project Requests

## 5. TRIRIGA Space Management

**Difficulty Level:** Intermediate

**On-site Duration:** 3 days

**Description:**

This course is designed to educate participants about the IBM TRIRIGA Space Management module. In this course, you will learn how to best capture, track, and manage spaces. Optional 3rd days are available to the Reservation Capabilities or Strategic Planning Capabilities that can be used in conjunction with the IBM TRIRIGA Space Management Module.

**Topics:**

- Space Management Overview
- Space Management Setup
- Space Allocations
- Space Audit
- Move Management
- Space Management Requests

## 6. TRIRIGA Maintenance Management

**Difficulty Level:** Intermediate

**On-site Duration:** 3 days

**Description:**

This course is designed to educate participants about the IBM TRIRIGA Maintenance Management module. In this course, you will learn how to set up service requests, set up service plans and metrics. We will learn to generate and manage corrective work orders, set up job plans and preventive maintenance (PM) schedules. Discussions around how technicians will complete PM work orders, as well as manage timesheets and closure.

**Topics:**

- Maintenance Management Overview
- Maintenance Setup
- Corrective Maintenance
- Preventive Maintenance
- Maintenance Contracts
- Task Assignments & Time Entry
- Invoicing

## 7. TRIRIGA Inventory & Purchasing

**Difficulty Level:** Intermediate

**On-site Duration:** 2 days

**Description:**

This course is designed to educate participants about the Inventory and Purchasing aspect of TRIRIGA. This is a shared conversation among the different applications. In this course, you will learn how to set up Inventory Locations and Inventory Items. Allowing the system to purchase, store, and distribute any type of inventory required amongst the different business processes.

**Topics:**

- Inventory & Purchasing Overview
- Inventory & Purchasing Setup
- Inventory Management
- Inventory Tasks
- Inventory Purchasing
- Inventory & Purchasing Requests
- Invoicing

## 8. TRIRIGA Facility Condition Assessment

**Difficulty Level:** Intermediate

**On-site Duration:** 2 days

**Description:**

Using the IBM TRIRIGA Facility Assessment application, organizations can efficiently manage the condition of all the items that are utilized within a building or structure. Learning this process will help organizations identify the estimated replacement costs associated with Facilities and the various Building Systems and to identify potential problems and their criticality of those problems preventing damage and costly breakdown to building System and Assets.

**Topics:**

- Facility Maintenance Overview
- Facility Maintenance Setup
- Request Management
- Preventive Maintenance
- Maintenance Contracts

## 9. TRIRIGA Environmental Management

**Difficulty Level:** Intermediate

**On-site Duration:** 2 days

**Description:**

This course is designed to educate participants about the IBM TRIRIGA Environmental Management module. In this course, you will learn how to Measure, Manage, and of course reduce your overall Environmental impact. Focus will be placed on Energy consumption but we will learn how to track Water, Travel, Waste, Weather, and other emission logs. There will also be instructions on the new IBM TRIRIGA Environmental Impact Manager.

**Topics:**

- Environmental Management Overview
- Environmental Management Setup
- Measure Consumption
- Impact Manager
- Carbon Calculations

### TRIRIGA Technical

## 1. TRIRIGA Application Administrator

**Difficulty Level:** Advanced

**On-site Duration:** 5 days

**Description:**

The intent of this course is to familiarize participants with the development and configuration of IBM TRIRIGA using the IBM TRIRIGA Application Platform Builder Tools. It will focus on the design, development, and problem solving techniques used within IBM TRIRIGA. The course will help explain the business logic and development tools of IBM TRIRIGA, and how it can be used to meet your business needs without knowing how to program the underlying code.

**Topics:**

- Application Administration Overview
- TRIRIGA Data Structure
- User Profiles
- Security management
- Portals and Navigations
- Notifications and Approvals
- Reports Manager



## 2. TRIRIGA Application Developer

**Difficulty Level:** Advanced

**On-site Duration:** 5 days

**Description:**

This course is geared towards anyone to be designated as the IBM TRIRIGA Application Developer. They will be able to modify the TRIRIGA application to do anything requiring configuration of the OOTB tool. We will cover best practices on making these changes to lessen the impact of any TRIRIGA Application Upgrade in the future.

**Topics:**

- Application Developer Overview
- TRIRIGA Data Modeler
- State Families and Transitions
- Form Builder
- Lists and Classifications
- Data Load
- Workflow Manager
- Reports Manager

## 3. TRIRIGA System Administration

**Difficulty Level:** Advanced

**On-site Duration:** 3 days

**Description:**

This course is designed to educate participants about IBM TRIRIGA and allied software installations, setting up the optimum performance parameters, day-to-day IBM TRIRIGA operations, log maintenance, troubleshooting techniques, thread management, memory management. The course also highlights best practices for system administration.

**Topics:**

- System Administration Overview
- TRIRIGA Architecture & Sizing
- Setup Database for TRIRIGA (Oracle, SQL, DB2)
- Setup Database for TRIRIGA
- Setup Web Server for TRIRIGA
- Setup Application Server
- TRIRIGA Property Files
- Upgrading TRIRIGA Platform
- Installing Tools Server
- Performance Tip
- Troubleshooting TRIRIGA

## 4. TRIRIGA Ad-Hoc Reporting

**Difficulty Level:** Advanced

**On-site Duration:** 2 days

**Description:**

The intent of this course is to familiarize participants with the ad-hoc reporting capabilities in the IBM TRIRIGA Platform. We will cover the various reporting types including: Queries, Charts, Hierarchal, and Advanced Associations

**Topics:**

- Report Manager Overview
- Report Building
- Chart & Summary Reports
- Advanced Features
- Hierarchy Reports
- Using Alternate Forms for Reports

## 5. TRIRIGA Birt Reporting

**Difficulty Level:** Advanced

**On-site Duration:** 3 days

**Description:**

The intent of this course is to familiarize participants with the BIRT reporting capabilities in the IBM TRIRIGA Platform. We will cover the various reporting types including: BIRT Query and Form Reports, Drill-through, Score Card, and various others.

**Topics:**

- Eclipse Install
- TRIRIGA Plugin Installation
- Report Perspectives / Report Projects
- Exporting Starter Report from TRIRIGA
- Eclipse Interface – Palette / Data Explorer / Navigator / Outline
- Create BIRT Report
- Upload Report to TRIRIGA
- Report Layout and Design Review
- Report Layout and Design
- Grids / Tables / Grouping / Sorting / Filters
- BIRT Expressions
- Parameters
- Form Reports



## **IBM Maximo Training Catalog**

JLL provides a full IBM Maximo catalog, which covers the individual applications as well as the IBM Maximo Platform, Administration and Reporting. In addition, curriculum courses can be tailored to meet specific training needs, or more closely align to specific customizations in a client installation.



## 1. IBM Maximo Basics

**JLL Course Code:** MAX-BASICS

**IBM Reference Code:** NA

**Duration:** 1 Day (Minimum 10 Trainees)

### Overview

This course is designed to familiarize new users with basic IBM Maximo concepts including navigation, menu, the start center, searching, reporting and a basic overview of features and functions.

### Pre-requisites

\* No prerequisites needed to take this course

## 2. IBM Maximo Application Administrator

**JLL Course Code:** MAX-WA

**IBM Reference Code:** NA

**Duration:** 4 Days

### Overview

As part of our dedicated IBM Maximo training catalog, this course focuses on the administrative modules of Maximo, such as resources, contracts, financials, and start center administration and best practices.

### By taking this course, participants will:

- Gain an overview of Maximo modules and applications
- Learn about navigation and application standards
- Review and discuss naming conventions and auto-numbering
- Review search techniques and saving queries
- Learn how to create, modify and assign start center templates
- Discuss account configuration and financial settings
- Review the bulletin board application
- Learn how to manage person records and user accounts
- Learn how to create and use person groups
- Review the application and report security structure, and understand how security groups work
- Learn how to create calendars and apply them in the system
- Learn how to create craft labor records, and the various ways to associate rates with them
- Learn how to create and use qualification records
- Learn the different types of contracts and how/when to use them
- Learn how to create and use escalations to send notifications and automate actions
- Discuss the type of domains (value lists) and learn how to manage them

### Pre-requisites

\* No prerequisites needed to take this course

### 3. IBM Maximo Work Management

**JLL Course Code:** MAX-WM

**IBM Reference Code:** NA

**Duration:** 2 Days

#### **Overview**

As part of our dedicated IBM Maximo training catalog, this class is designed to teach participants the fundamentals of identifying, creating, planning, scheduling, assigning, executing, completing and analyzing maintenance work using IBM Maximo.

#### **By taking this course, participants will:**

- Gain an overview of the work order, safety and preventive maintenance modules in Maximo
- Review the typical life cycle of a work request
- Discuss the purpose of Maximo in managing and maintaining work assets
- Discuss how to leverage the start center to assign, route and manage work
- Learn how to create work requests and what differentiates them from work orders
- Learn techniques for preventing work order duplication
- Review the status and function of a work order
- Review the different methodologies of assigning work
- Discuss methods for prioritizing and escalating aging or high-priority work orders
- Discuss best practices for completing versus closing work orders
- Learn how to create job plans and use job plan sequencing
- Learn how to create preventive maintenance schedules and manually generate them
- Explore creating, assigning and tracking preventive maintenance work
- Understand the automation of preventive maintenance schedules
- Learn how to utilize routes for maintenance inspections to drive predictive maintenance
- Learn how to record down time on a work order
- Learn how to record meter readings on a work order
- Learn how to create and use safety plans
- Learn how to create and use failure codes and discuss their benefits
- Learn techniques for searching for and finding records in Maximo
- Learn how to view equipment history and locate spare parts
- Learn how to apply plans or estimates to a work order
- Learn how to record work efforts and materials used on a work order
- Learn how to leverage classifications to standardize work descriptions

#### **Pre-requisites**

\* No prerequisites needed to take this course

## 4. IBM Maximo Asset Management

**JLL Course Code:** MAX-AM

**IBM Reference Code:** NA

**Duration:** 3 Days

### Overview

As part of our dedicated IBM Maximo training catalog, this comprehensive class teaches your team how to leverage Maximo to optimize organizational assets.

### By taking this course, participants will:

- Gain an overview of the asset module and other administrative and organizational settings used in Maximo for management and maintenance
- Discuss fundamental best practices of asset management
- Discuss the hierarchical structure of asset and location records in Maximo
- Discuss best practices for naming assets
- Learn how to capture costs and leverage hierarchies for cost rollup purposes
- Learn how asset records work with rotating items
- Learn how to associate or assign assets to a custodian or user
- Learn how to leverage meters for more efficient preventive or predictive maintenance
- Learn how to build and schedule preventive maintenance
- Learn how to use warranty information to avoid unnecessary repair costs
- Learn how downtime is tracked
- Learn how to leverage classifications for standardized asset descriptions
- Learn how to apply new attributes to a given asset without the need to modify or add new fields
- Discuss how to leverage priority in the work flow
- Learn how to view an asset's complete history

### Pre-requisites

\* No prerequisites needed to take this course



## 5. IBM Maximo Inventory Management

**JLL Course Code:** MAX-IM

**IBM Reference Code:** NA

**Duration:** 3 Days

### Overview

As part of our dedicated IBM Maximo training catalog, this course will educate your team on how to use and leverage the inventory and purchasing modules in this powerful platform.

### By taking this course, participants will:

- Gain an overview of IBM Maximo's inventory and purchasing modules and related applications
- Learn how items are managed, organized and distributed throughout the Maximo system
- Learn how inventory balances are managed
- Learn how to perform cycle counts and physical inventory within Maximo
- Learn how inventory items are issued to work orders, assets, locations and/or individuals.
- Learn how to automate the reorder process and record received items
- Learn how to retrieve usage data for inventory items
- Learn how to configure and manage rotating items
- Learn how to leverage the tools and services applications
- Learn how purchase contracts are used in Maximo
- Discuss the use of the request-for-quotations feature to contain costs
- Review purchase requisitions and discuss how they can be used in the work flow

### Pre-requisites

\* No prerequisites needed to take this course

## 6. IBM Maximo Work Flow Development

**JLL Course Code:** MAX-ADMIN-WF

**IBM Reference Code:** NA

**Duration:** 2 Days

### Overview

As part of our dedicated IBM Maximo training catalog, this course will educate participants on the methods of developing and manipulating workflows in Maximo.

### By taking this course, your team will:

- Gain an overview of concepts and principles of developing workflows for use in Maximo
- Review the elements of the start center and their integral usage in workflows
- Learn how to configure and use the result set portlet for work flow
- Gain an in-depth review of the workflow designer application, including in relation to roles, actions and escalations
- Learn the purpose of the workflow designer in developing work flows and the role of the inbox in the start center
- Learn how to configure alerts and escalate aging work
- Learn how to configure KPIs and reports for use in work flows

### Pre-requisites

\* Please note: a prerequisite for this course is MAX-ADMIN

## 7. IBM Maximo Application Development

**JLL Course Code:** MAX-ADMIN-AD

**IBM Reference Code:** NA

**Duration:** 5 Days

### Overview

As part of our dedicated IBM Maximo training catalog, this course will familiarize your team with the development and configuration capabilities within the platform's application designer. Focusing on design, development and problem solving techniques, the course will help participants understand the business logic and development tools of IBM Maximo, and show how they can use it to meet business needs—without having to know how to program the underlying code.

### By taking this course, participants will:

- Gain an overview of the Maximo developer role
- Review Maximo terminology and basic functionality
- Understand name conventions and best practices
- Review the database configuration and business objects
- Learn how to add a new attribute (field) to an existing object
- Learn how to add a new business object
- Learn how to use the application designer to:
  - Modify screens and expose new or hidden fields
  - Create new screens
  - Hide screen elements conditionally
  - Change properties of the screen and fields
  - Enforce restrictions
- Learn how to use signature options and security, and enforce business practices
- Learn how to export/import the application definition's XML code
- Learn how to modify and create new Maximo lookups
- Review system XML files
- Learn how to create conditional expressions and how/where they are used in Maximo
- Learn how to leverage workflow designer in application screens
- Learn the various ways a default value can be set in fields
- Learn how to create and use automation scripts

### Pre-requisites

\* Please note: a prerequisite for this course is: MAX-ADMIN



## 8. IBM Maximo system administrator

**JLL Course Code:** MAX-ADMIN

**IBM Reference Code:** NA

**Duration:** 3 Days

### Overview

As part of our dedicated IBM Maximo training catalog, this course will educate your teams on Maximo's configuration in a Websphere/Windows Server environment. The class will also explore performance tuning, application properties and security settings.

### By taking this course, participants will:

- Gain an overview of Maximo in a Websphere/Windows environment
- Learn how to redeploy the Maximo EAR file and when it's necessary
- Learn how to integrate Maximo with Active Directory using the LDAP protocol and securing Maximo with SSL
- Gain Maximo/Websphere performance tuning tips
- Learn how to review system log files, extend the log files and basic troubleshooting
- Learn how to review organizational settings
- Learn how to review database configuration and business objects
- Learn how to create and maintain database indexes
- Learn how to configure Maximo's financial module
- Learn how to configure Maximo for a multi-site implementation
- Learn how to configure users and manage Maximo signature security
- Review licensing considerations and functionality
- Learn how to manage report security, and to configure and extend report object structures (ROS)
- Learn how to create/modify start centers and key performance indicators (KPIs)
- Learn how to configure e-signatures and enable auditing
- Learn how to configure domains (value lists)
- Learn how to create conditional expressions and where/how to use them
- Review CRON task setup
- Review system properties
- Learn how to configure escalation notifications and actions
- Review integration concepts and procedures
- Learn how to configure the email listener
- Learn basic functions of the application designer
- Learn basic functions of the workflow designer

### Pre-requisites

\* No prerequisites needed to take this course

## 9. IBM Maximo – Birt Reporting Training

### Overview

As part of our dedicated IBM Maximo training catalog, this this course will train your team to create and deploy enterprise Business Intelligence and Reporting Tools (BIRT) for IBM Maximo's Computerized Maintenance Management System.

Covering a range of topics from installing the Eclipse/BIRT Report Designer to report creation, design and and deployment, **this course will empower your in-house experts to:**

- Install Eclipse/BIRT Report Designer to workstation
- Report design layout overview – including dos and don'ts
- Learn basic, fundamental SQL (Standard Query Language) techniques
- Learn how to create a BIRT report and deploy it to Maximo
- Learn how to utilize grouping, sorting, filtering, expressions, aggregations, conditional highlighting, images and more in a report
- Learn how to use parameters in a report
- Learn how to use sub-reports
- Learn how to create and use drill-through reports
- Learn how to configure charts and graphs in a report
- Learn how to configure crosstabs (pivot tables) in a report
- Learn how to build report templates
- Learn how to create Query Based Reports (QBRs) in Maximo, and extend them using BIRT
- Learn how to execute, schedule, and email reports from Maximo

### Pre-requisites

\* Please note: a prerequisite for this course is demonstrable familiarity with Maximo, or completion of the MAX-BASICS course.

\*\* JLL reserves the right to cancel or re-schedule training if minimum class size is not achieved.

When it comes to training, we understand that properly delivering our content is essential for our student's success. Thus, many of our courses offer the following delivery methods:

- Virtual: Instructor-led remote sessions
- Online: Self-paced learning hosted on IBM's Skills Gateway
- In-Person: On-site sessions led by an instructor



Reach out to us today at [helloJLLT@jll.com](mailto:helloJLLT@jll.com)

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