TriO
Out of Office System
User Guide
About TriO

• Out of Office Tracking System

• Reports that can be run by date, person, hierarchy, home locations, and destination locations

• Email notification of requests/approvals and a viewable shared Outlook calendar is updated upon approval to make the request visible in your calendar (Windows, MAC and iOS devices)

• Approved out of office requests are automatically added to every project in Bluefoot (Entertainment Project Management system) to which the user belongs

• User customizable daily, weekly, and/or monthly out of office reports sent via email as desired
Getting There

• Trio is located at http://trio.disney.com

• Enter your MyID credentials to log in (may be “HUB” ID or email)

• Upon first login, you will be directed to the registration screen

• Enter your information and submit

• Approval will take place within 1 business day

• Please submit any questions, comments, or issues to the following site: Systems Request Site
Manage Account

- After your first login, the Manage Account screen is where you can change certain information.

- To manage your account information, click on the Manage Account link in the upper right corner, available on any TriO page.
Manage Account

- From the Account Details page, you can update your information as needed, including setting Regular Days Off, setting Approvers, Acknowledgers, and Proxies.
  - Approvers - Direct Leader(s) that approve requests.
  - Acknowledgers - Those people directly related to your work or projects that need to be notified of your request.
  - Proxies - People that you would allow access to generate requests or approve on your behalf (like a delegate in Outlook).
Manage Account

- Regular Days Off can be managed from this screen. Click and select the start date you would like the modified regular days off to take effect (default is Saturday and Sunday). Check the new regular days off, then click add to list. Change as needed.
In order to receive email notifications, you need to set how you would like to receive them. Click My Account and locate the Email Priority section below your email address. Click on “Edit” and select the your preferred option from the dropdown. The options are “None”, “Immediately” or “Daily”.

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This is the dashboard screen from which you can see your out-of-office requests or add additional requests.
The “Quick Entry” button allows for faster entry of either Sick, Work From Home or a Vacation Day for today’s date. A Quick Entry pop up will display on the Calendar screen allowing you to choose your Quick Entry selections. Sick will immediately be approved. Work From Home and Vacation will still require approval from your leader.
Benefit Time Balances can now be viewed on the Calendar Screen. The Note below the Calendar stipulates that these balances only reflect what has been currently entered in SAP. This is important as any future TriO requests would not have yet been entered or processed in SAP. Please keep in mind any benefit time requests made by Salaried Cast are “Full Day” requests. Per contract, some Hourly Cast can split their benefit time. Hourly Cast should confirm any split day requests with management.
Create a New Request

- To create a new request, click and drag an Out of Office Type from the left side on to the date requested in the calendar or click on New Request in the upper left corner.

- Alternately, click on the calendar, drag your arrow across a set of dates, and then release the button.
Create a New Request

- Enter a title for your request in the designated box
- Enter a description in the next box (optional)
- In the next section, click on the dropdown box next to “Type”
- Note: some of this information may be pre-filled and can be changed as needed
Create a New Request

- For “Business Trip or “Local Business Trip”, you must specify a location.

- Note: All WDP&R locations and key cities are represented. If there is a location that is not on the list, select “Other” and a box will appear to enter the location.

- If you are traveling to multiple cities or have different types, you must fill out different requests to accurately record the information.

- Click on Add time to specify what hours you will be out of the office for your trip. This can be used by “Hourly” Cast for benefit time, but not “Salaried” per contract.

Note: For the “new” Add Time feature . . . Add time should be set for Start Date/Time and also for End Date/Time.
Create a New Request

- Coverage is an optional field. Use it to identify a person that is covering for you while you are out of the office. Along with the name, enter the project or work that they are covering and click “Add to List”. You can add as many people as required.

- Tip: Like other lists, you can start typing letters to filter names
Create a New Request

- Acknowledgers are people who have no bearing on approval, rather they are people that you want directly informed when you are going to be out of the office. This should not go to everyone, only key people that are directly connected to your work or project should be added. Reporting from TriO will inform most other people that you are out of the office.

- To add a name, click on the list, select to name, then click “Add to List”. Press the X to remove the name.
Create a New Request

- Approvers are the people that must approve your request before it can proceed. This is typically your direct leader in SAP. In some cases, there may be more than one leader that is required to approve. You can not change the names from this screen. To change the names, click on “Manage Account” in the far upper right portion of the site, then change the name in the approver section.

- No one, including acknowledgers, will see the request if it is not approved by all approvers. Once approved by all approvers, notifications to the acknowledgers, and information to reports, will be sent.
Create a New Request

- Once the request has been filled out, click on the “Submit Request” button to send to the approver. Again, until ALL approvers have approved the request, no one will be able to see it.

- To save the request but not send it, click on Draft. You will need to go back and send it or it will not move forward in the process. This shows up as a request with diagonal lines on your TriO calendar dashboard.
What happens next?
Request Approved

- When a request has been created, it will notify the approver that there is a pending request. When ALL approvers listed approve the request (if you have more than one approver listed, they must all approve the request), the following actions will happen:
  
  - Notification and Outlook Meeting Request - you will receive an email notification if you've signed up for them
  
  - Acknowledgers - All acknowledgers listed on the request will now be notified of the out of office request.
  
  - Bluefoot (Project Management System for Creative Entertainment) - Every project to which you are assigned will now have an out of office calendar item placed on the project calendars corresponding to the information in TriO. If you update or withdraw the request, the Bluefoot calendar item will automatically update.
  
  - If you are able to subscribe to the Outlook calendar (Outlook for Windows or mobile devices only), this will also be updated. Instructions on subscribing are on the next page.
On the Calendar “Home Page”, you may now view approvals by clicking on the “Approvals” button to display on your calendar any approved time that you, as an approver, have completed for your direct reports. You may click it again to toggle those items off of your calendar.
View Approvals

On the Calendar “Home Page”, you also have the option to view items that you have approved by moving the slider that is located on the upper right of the calendar, from “calendar” to “list”. This list will display your personal requests, any upcoming requests you have approved for your direct reports, as well as any requests that you have been set as an acknowledged.
On the Calendar “Home Page”, you may now view acknowledgments by clicking on the “Acknowledgments” button to display on your calendar any approved time that you are listed as an acknowledger on. You may click it again to toggle those items off of your calendar.
Subscribe to an Outlook calendar for TriO

OFFICE 365 - INTERNET CALENDARS
Instructions to use Office 365 to subscribe to a TriO Calendar

1) Log into office 365 @ https://outlook.office.com/owa/?realm=disney.com&path=/calendar/view/Month
2) Sign in using Disney Email and portal password
3) Click Add calendar and choose From internet from drop list

Note: This method will add to Windows, Mac, and mobile devices.
Subscribe to an Outlook calendar for TriO

4) Open a new browser window or new tab and sign into TriO @ https://trio.disney.com then click “Manage Account”

5) Right Click on Export to Outlook button within Calendar Subscriptions and choose Copy link address from list
Subscribe to an Outlook calendar for TriO

6) Go back to office 365 window/tab

7) In Calendar subscription, paste (keyboard Ctrl-V or mouse right click and select Paste) within Link to the calendar field **Optional** Enter a Calendar name. If left blank TriO will be used.

8) Click Save
You will now see your TriO subscription in Office 365. It will also display in Microsoft and Mac Outlook and iOS devices

**Note:** Office 365 does not immediately update or sync. There is a delay, but it should not be longer than 6 hours
What happens next?  
Request Denied

• Approvers have the ability to deny requests from within the system. If for some reason the request has been denied, there is a place for the person that denied the request to enter notes as to why the request was denied. Regardless of whether or not there is a reason listed, the person that sent the request will receive a notification listing who denied the request.
Action Items

- If you are an approver or acknowledger, you will eventually have action items. Action items are where you go to approve or acknowledge requests. From the Dashboard, you can see two notifications that there are waiting action items. Click on either to go to the Action Items screen.
Action Items

- If you are an Approver, you will see any items awaiting action. You can click on the magnifying glass to see more info, the X to deny, or the check mark to approve the request.

- If you are an acknowledger, you can click on the magnifying glass for more info and the check mark for acknowledgement (optional and has no bearing on the request)
• If you are a proxy for someone else, i.e. you have permission to request or approve on the behalf of someone else, you can access the information through the Proxy link.
• Locate the person you would like to be a proxy for and click on Activate Proxy.
• After you have activated the proxy, you will now be in that person’s screen and can do for them any of the actions you could do for yourself. Notice the top bar becomes red and tells you for whom you are acting as proxy.

• To stop proxying and return to your account, click the Stop Proxying link.
Reporting

- Reporting allows you to see all of the information within the database
Report Update May 2018

Report page now features new descriptions to help users find the perfect report.

Selecting any of the icons opens report options box shown on the next page.

"Home" and "Destination" reports have been combined to form the "Location" report.
After selecting a report, the report options box opens here.

Yellow highlight shows the selected report.

New filter allows users to only see Out of Office types they want on their report.

After filling out the desired fields, users can run the report, or add it as a favorite for easy future access.
Once the **Favorite Report** is added it is displayed at the top of the report page. New action icons allow the users to **Run**, **Edit**, **Share** and **Delete** favorite reports. **Report Frequency** dictates how often the report is automatically sent to the user via email.
Location Report has combined the Home and Destination reports into one easy to switch report box.
Questions or issues?
Please submit an Entertainment Systems Request via The Lobby with your thoughts.