University of Minnesota
Driven to Discover℠

Reference Guide: Starting a Project

Purpose: This document will provide Project Managers, and their team, information on assigning contact roles and starting a project after project initiation (CPR).

Note: Some screenshots in this guide may not match the current system because the TRIRIGA platform was upgraded on March 7, 2022. The look of menus and navigation has changed. Please refer to the TRIRIGA Upgrade Portal Tips reference guide for additional information.

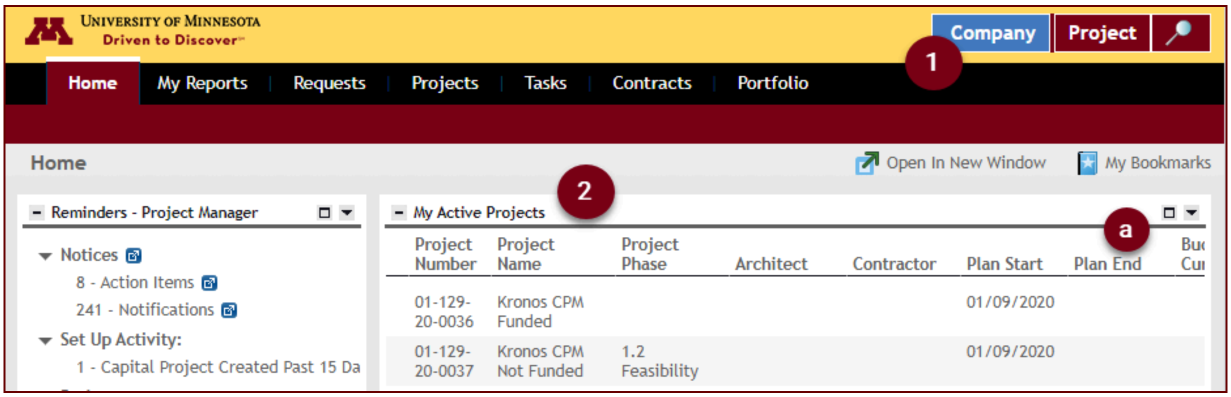
Reference Guide Details	
Helpful Hints	● Before proceeding, log into TRIRIGA. ● Save often! TRIRIGA does not autosave data. In order to ensure your da entry is committed to the system, click the **Save** action button throughout you setup. ● These are the initial steps for the Project Management team. ● Every project is different. Fill out the Project record to the best of your capabilities.
Revision Date	8/30/2020

Starting a Project

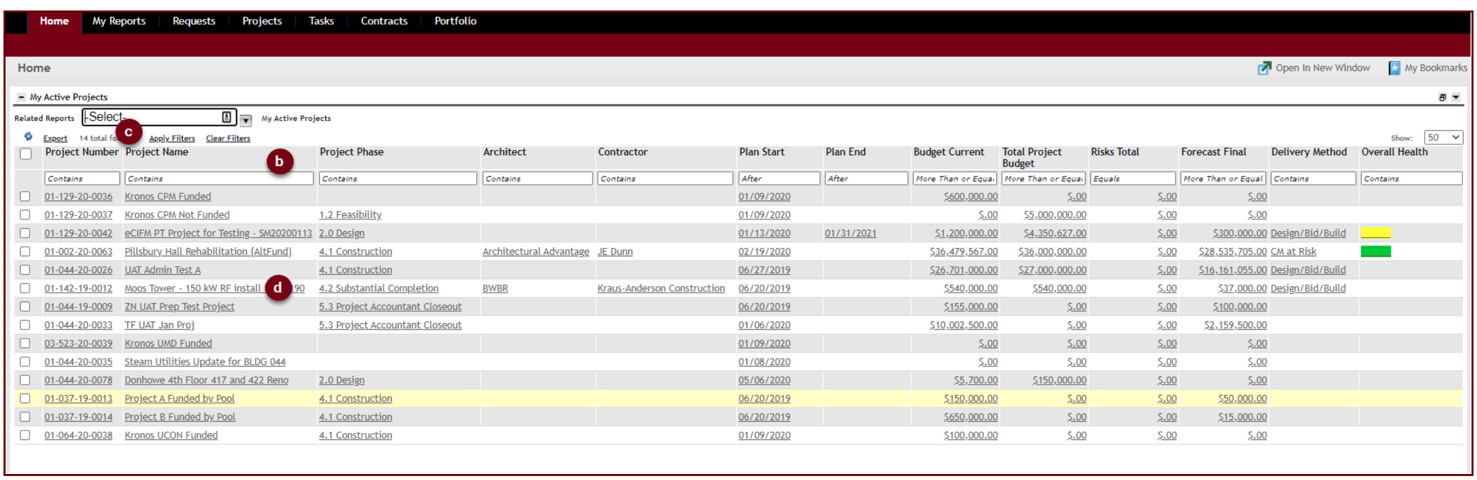
A project request is submitted through TRIRIGA. The request is then reviewed by a Project Intake Coordinator. If the project request generates an approved project, a project record is created. The new Project record is created using a project template, assigning it to the appropriate office, and activating the project.

A Project Manager team manager or Director will assign a project manager to a project record. A Project Accountant team manager will assign a Project Accountant to a project record. The project will then appear in the portfolio of the assigned Project Manager and Project Accountant. The remaining project team members can then be assigned to the Project as contact roles.

Assign a Contact Role



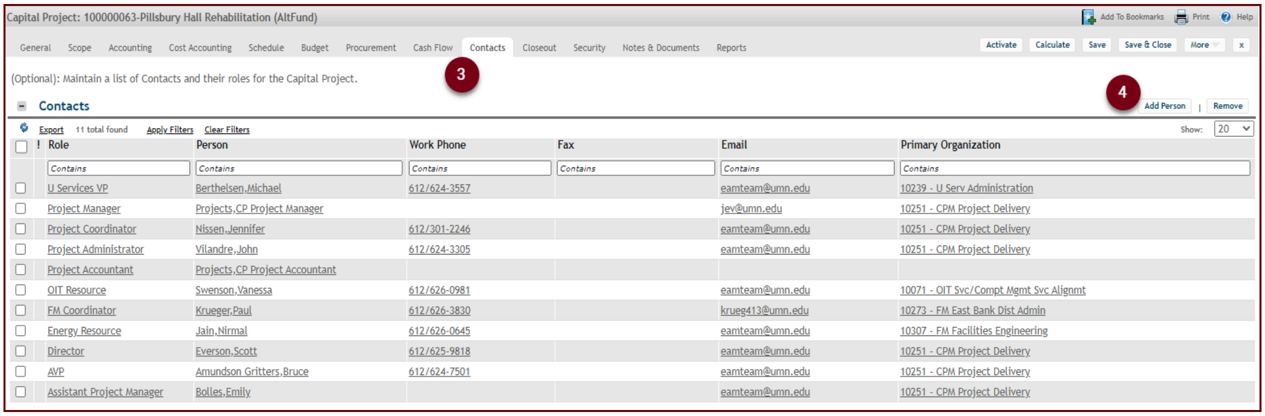
1. Select the **Company Focus** button
2. Under the **My Active Projects** portal, click on the project record to open
   a. Click the **Maximize** icon if the desired project is not visible.



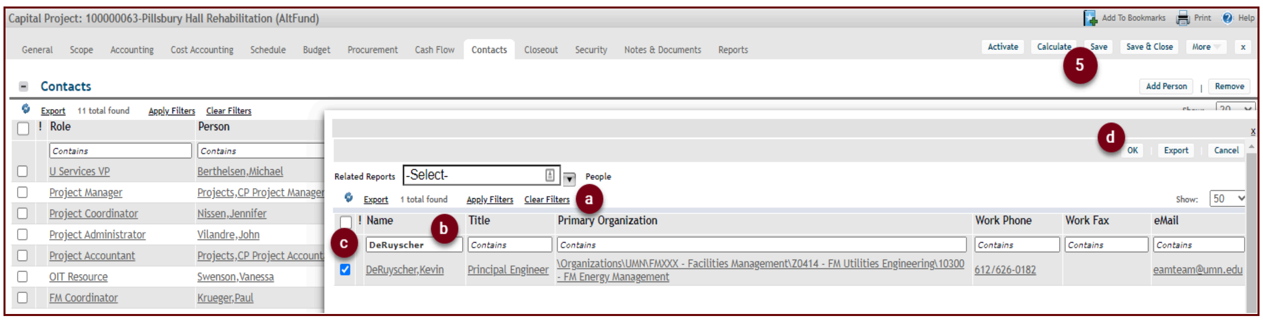
b. Enter text in the text field under the Project Name field.
c. Click enter or **Apply Filters**.
d. Click on **Project** to open.

Complete the Contacts Tab

This details the data that is required to complete the Contacts Tab.

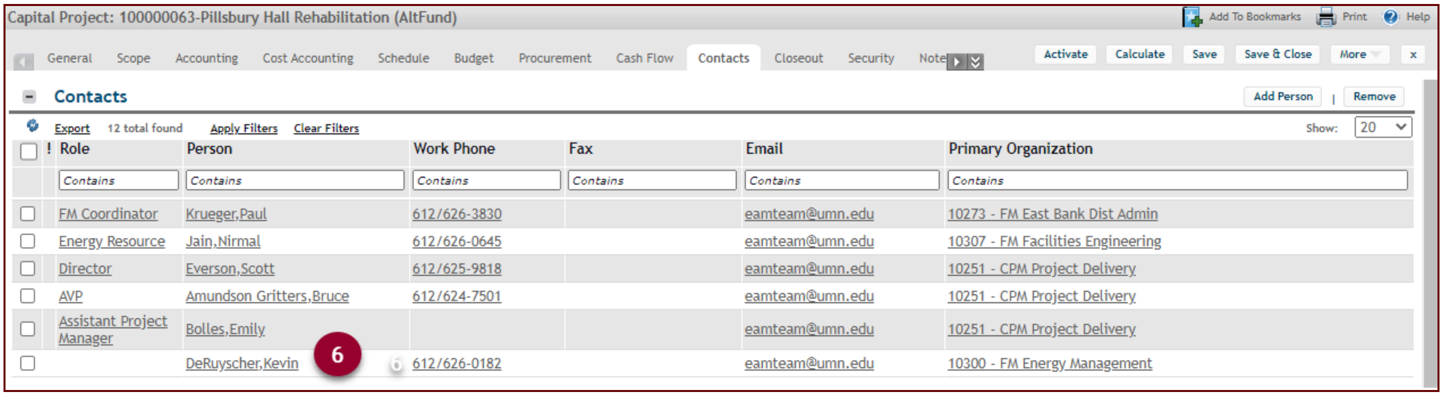


3. Select the **Contacts** tab
4. Select **Add Person**

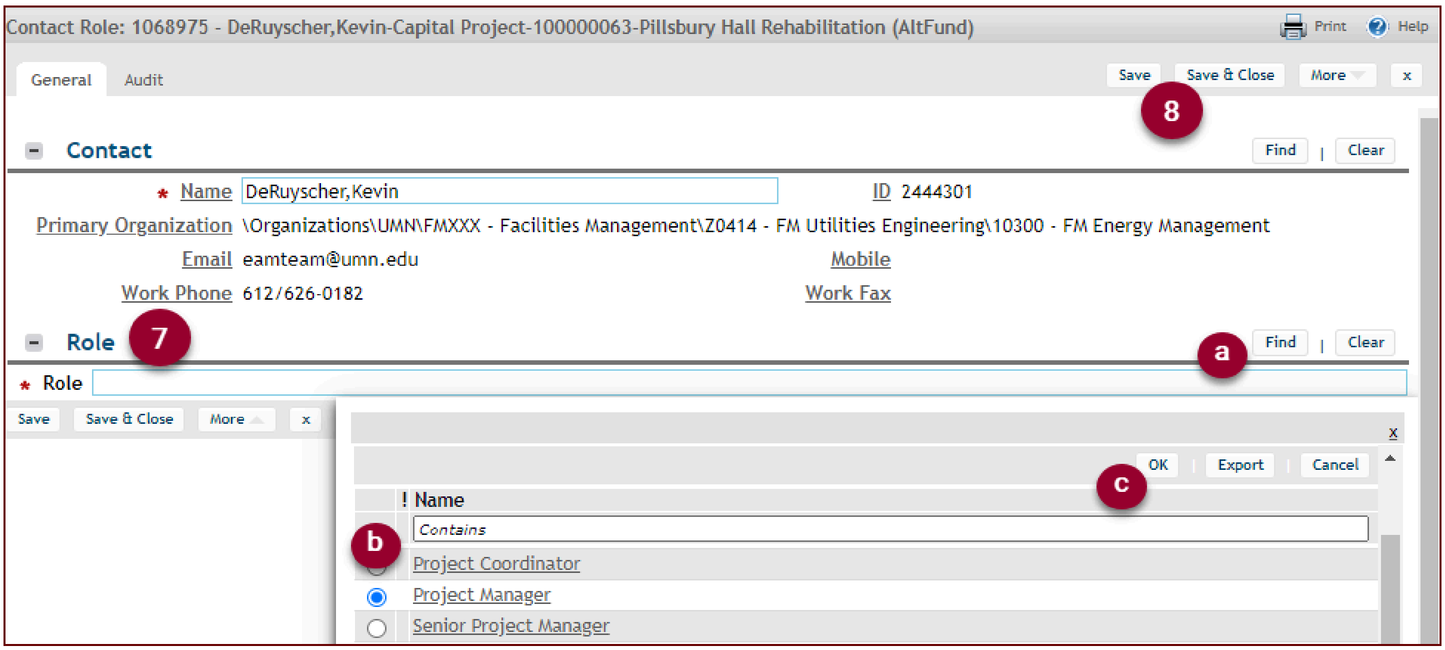


a. Click **Clear Filters** if names are not listed
b. Enter part or full name in the **Name** field and click enter
c. Check the checkbox to the left of the name
d. Click **OK**

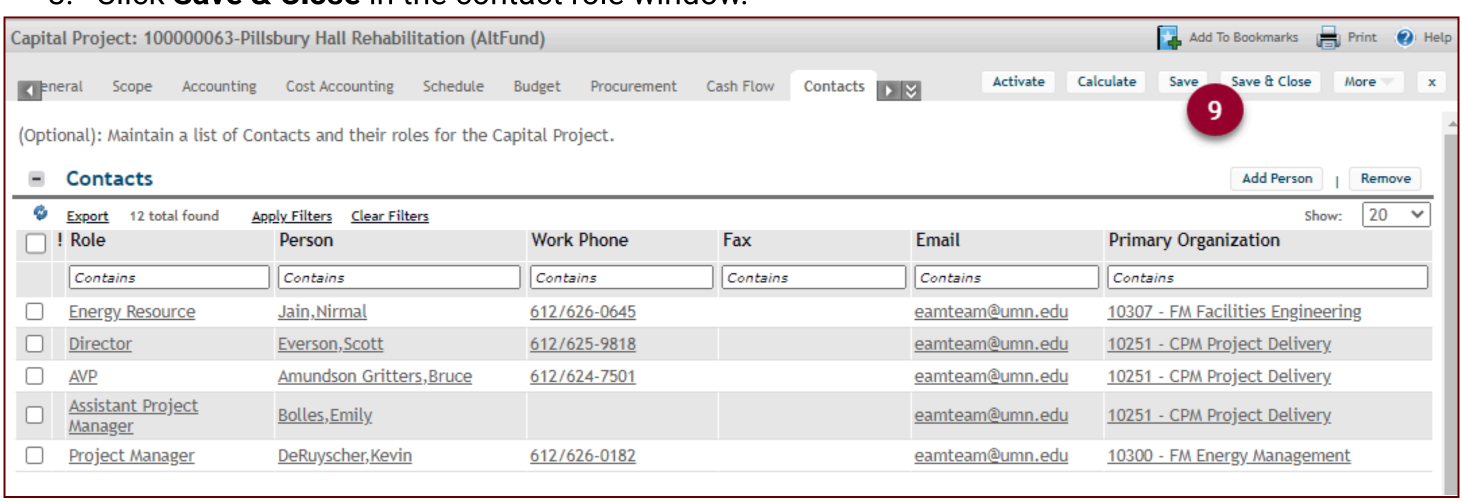
5. Click **Save**



6. Select the person to assign the role



7. **Role Section**
    a. Click **Find.**
    b. Select the radio button to the left of the name.
    c. Click **OK.**
8. Click **Save & Close** in the contact role window.

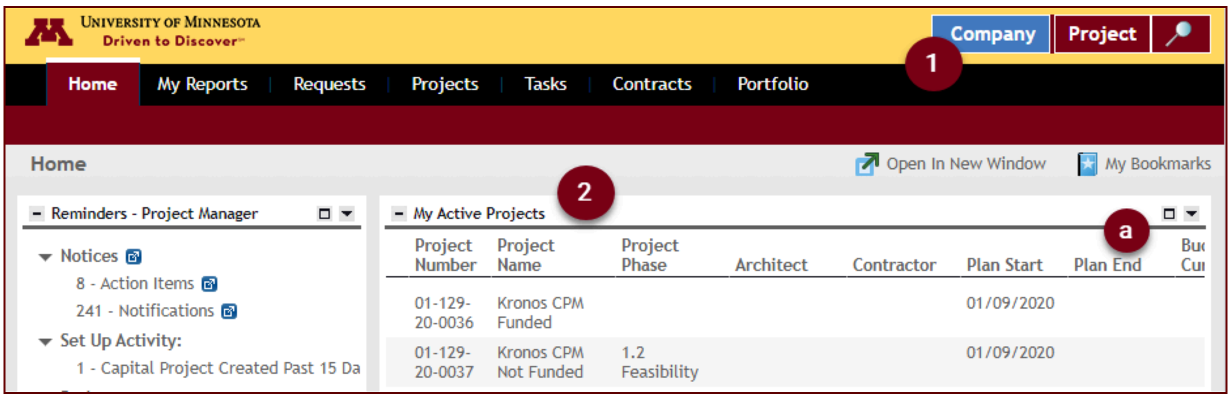


9. Click **Save & Close** in the project window.

Populate the Basic Project Record Fields

As a Project Manager, there are some basic steps that will be conducted when a project is first assigned. Some of those steps include revising the total budget, entering the project phase, and adding data to the already existing cost codes. Information entered varies and is dependent on the project.

Once the basic known information is entered, the project should be issued. When a project is issued, the project accountant will look at the paperwork and add the account codes so that money entered in the cost codes and starts being spent.



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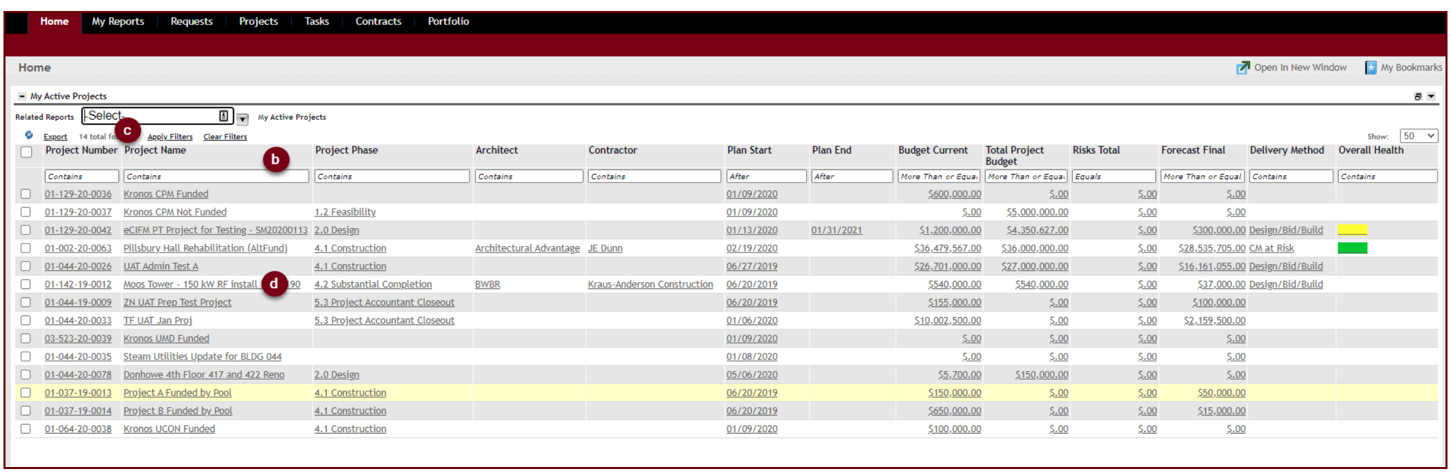

    b. Enter text in the text field under the Project Name field.
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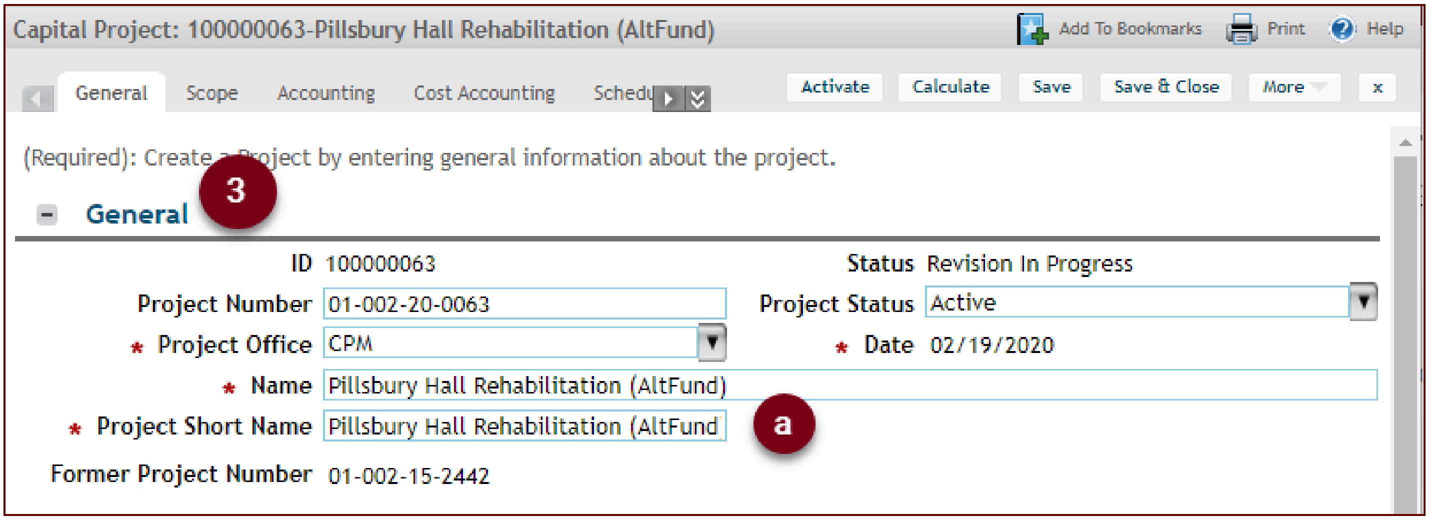
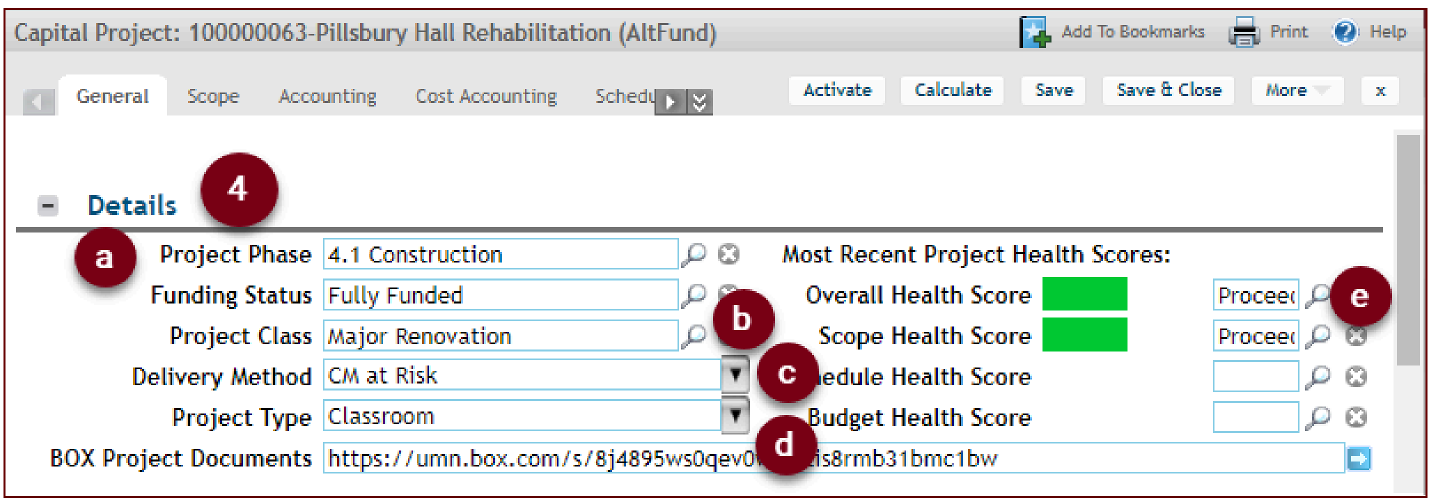
Update the General Tab

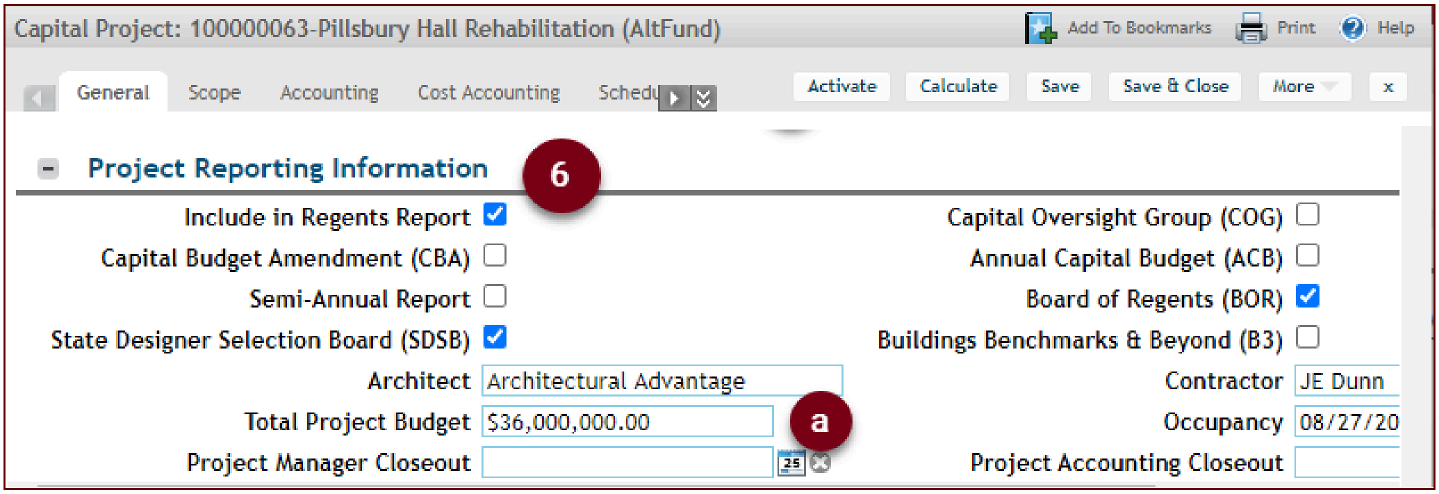
This gives examples to update the General Tab.



3. **General Section**
    a. Update the **Project Short Name** field if needed



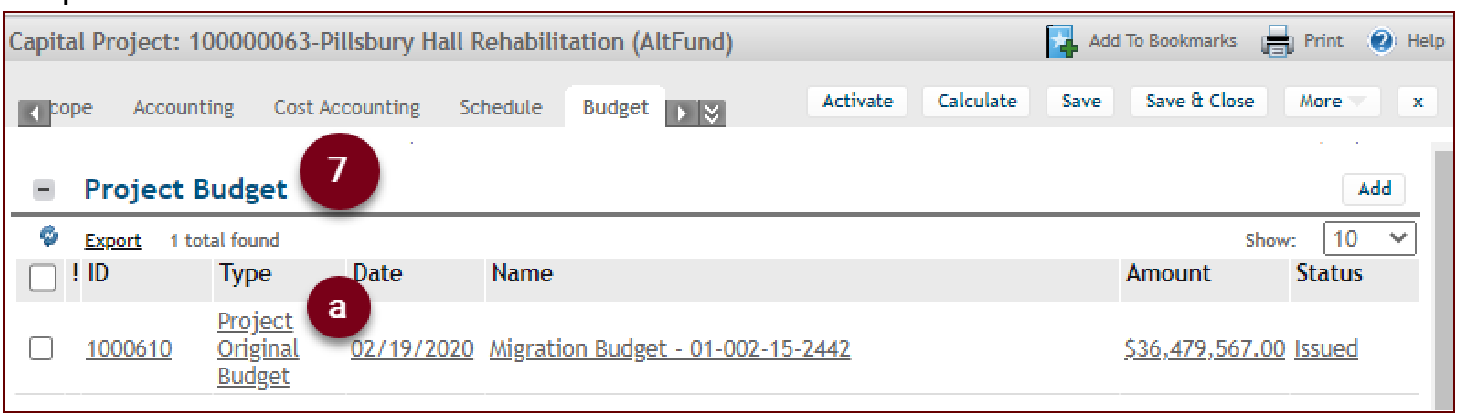
4. **Details Section** (Enter all known information. Projects will vary.)
    a. Select the Lookup icon to the right of **Project Phase**
        i. Select the Project Phase
    b. Select the Lookup icon to the right of **Project Class**
        i. Select the Project Class
    c. Select the drop-down menu to the right of **Delivery Method**
        i. Select the Delivery Method
    d. Select the drop-down menu to the right of **Project Type**
        i. Select the Project Type
    e. Select the Lookup icon to the right of **Overall Health Score**
        i. Select the radio button to the left of the Order
        ii. Click **OK**
5. Select **Save**.



6. **Project Reporting Section** enter values in the following fields (also, add any additional known field values):
   a. Click in the **Total Project Budget** field to update the Total Project Budget

Update the Budget Tab

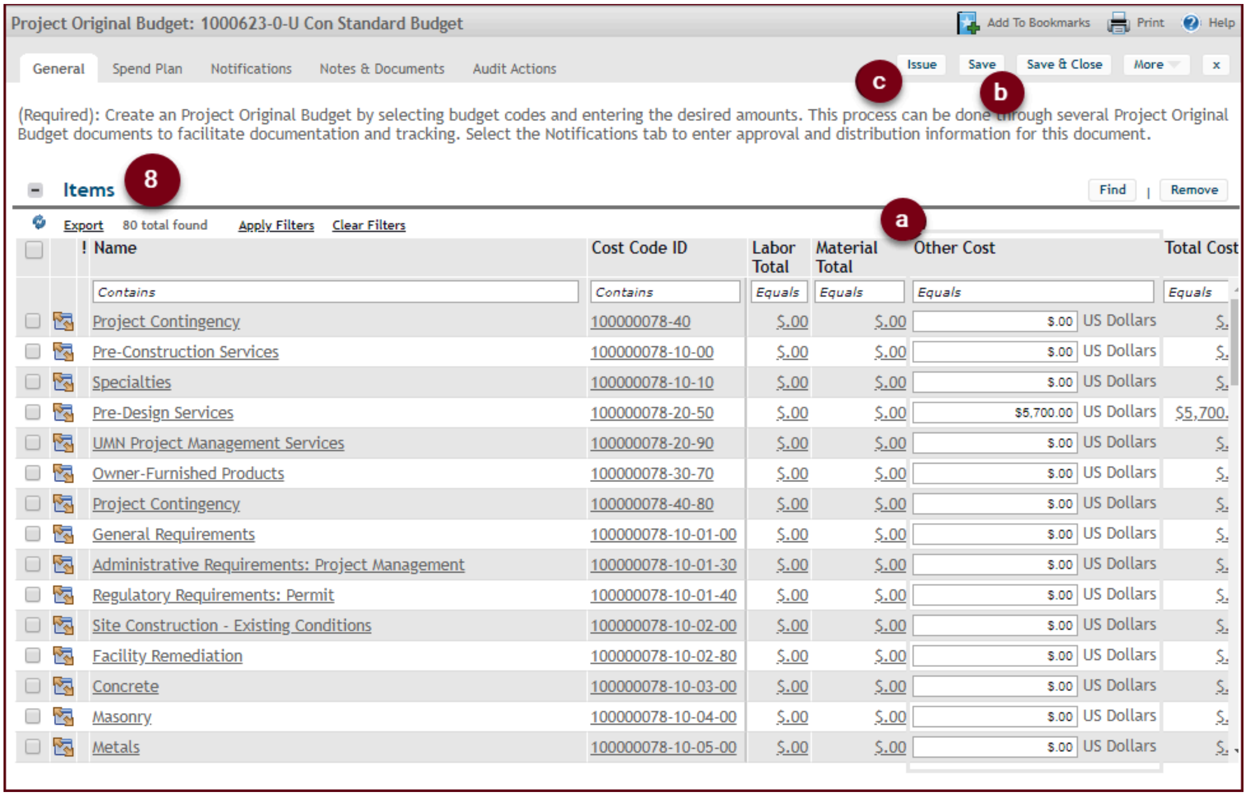
Some projects may require the Project Original Budget to be updated. You can see Project Budgets for complete instructions.



7. **Budget Section**
   a. Select the Project Original Budget to add values to cost codes

Update the General Tab

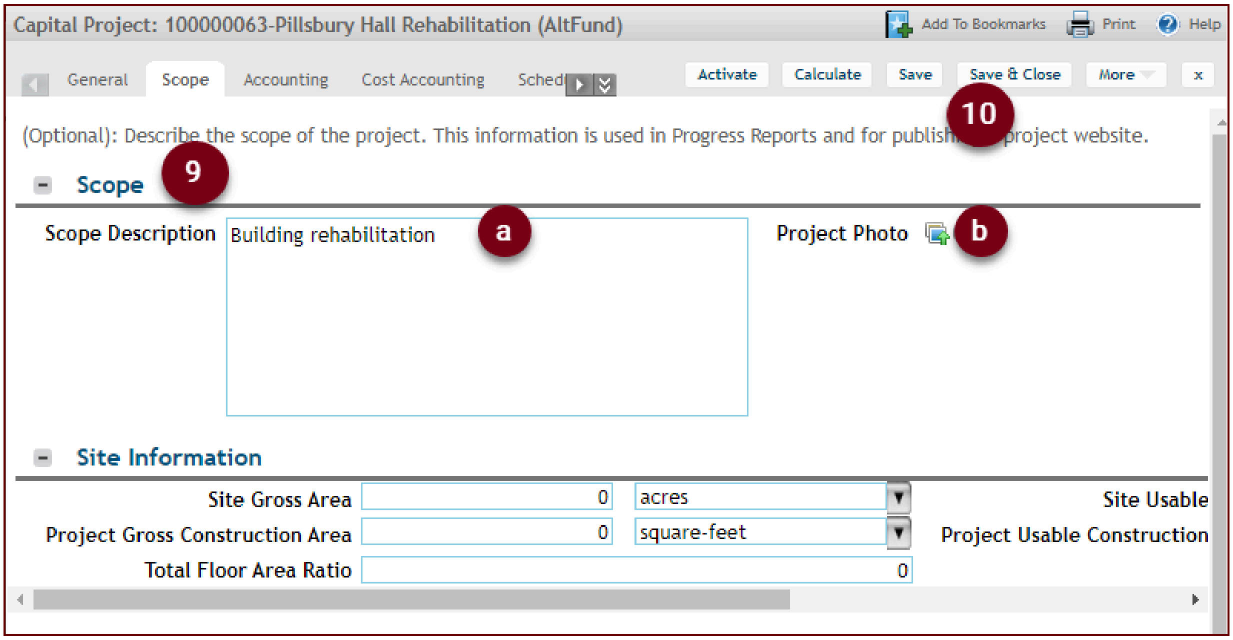
Costs can be updated in the Original Cost column.



8. **Items Section**
    a. Update cost code amounts in the **Other Cost** field
    b. Click **Save** in the Project Original Budget window
    c. Click **Issue** in the Project Original Budget window

Update the Scope Tab

The project management team should enter a Scope Description at the start of a project.



9. **Scope Section**
    a. Enter the Scope Description in the Scope Description field.
    b. Select the Upload icon to the right of Project Photo to upload a photo of the project.
10. Click **Save & Close** in the project record window.