

# 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	<ul style="list-style-type: none"> <li>• Before proceeding, log into TRIRIGA.</li> <li>• Save often! TRIRIGA does not autosave data. In order to ensure your data entry is committed to the system, click the <b>Save</b> action button throughout your setup.</li> <li>• These are the initial steps for the Project Management team.</li> <li>• Every project is different. Fill out the Project record to the best of your capabilities.</li> </ul>
Revision Date	8/30/2020

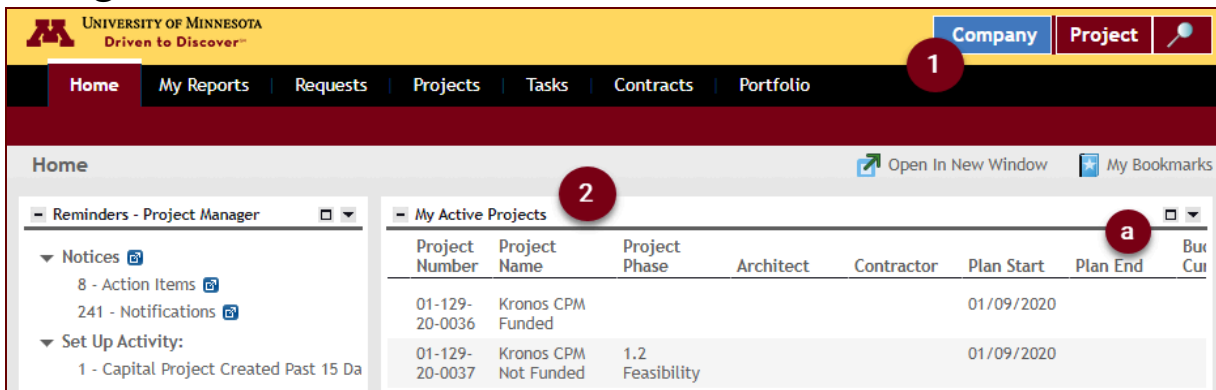
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# Starting a Project

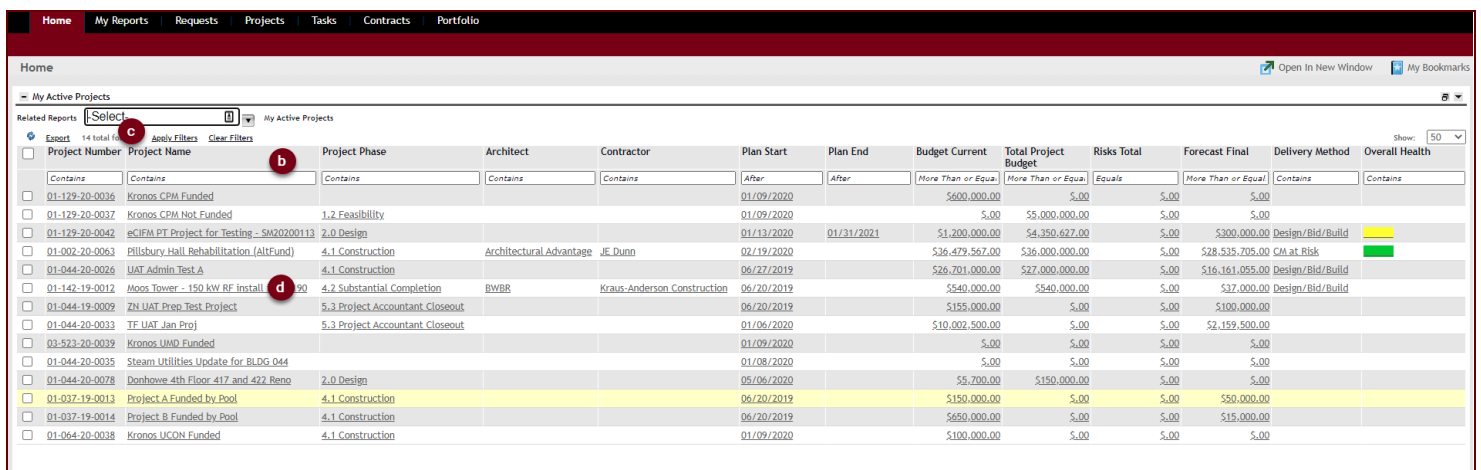
A project request is submitted through TRIRIGA. The request is then reviewed by a Project Intake Coordinator. If the project request generates an approved project, a project record is created. The new Project record is created using a project template, assigning it to the appropriate office, and activating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



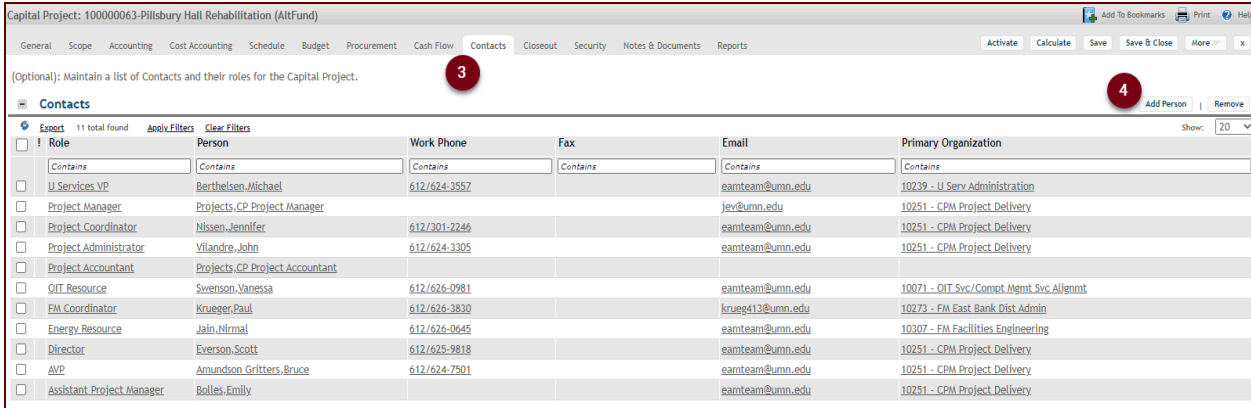
1. Select the **Company Focus** button
2. Under the **My Active Projects** portal, click on the project record to open
  - a. Click the **Maximize** icon if the desired project is not visible.



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

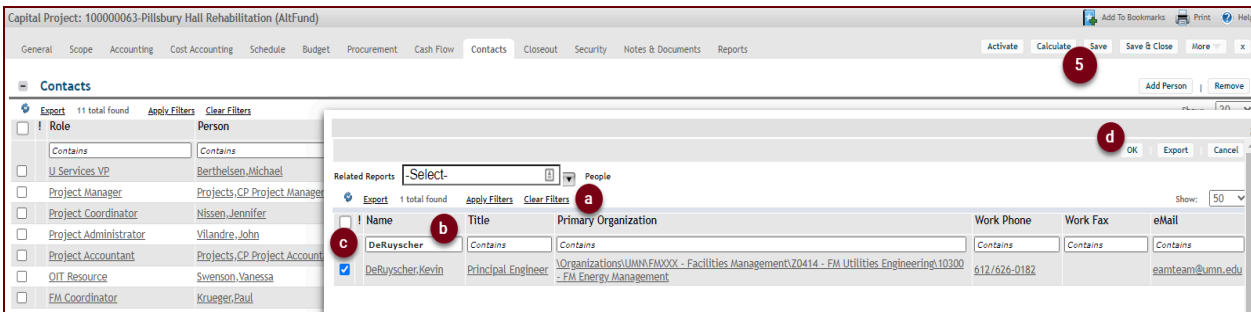
# Complete the Contacts Tab

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**

Capital Project: 10000063-Pillsbury Hall Rehabilitation (AltFund)

General Scope Accounting Cost Accounting Schedule Budget Procurement Cash Flow **Contacts** Closeout Security Note

Activate Calculate Save Save & Close More

**Contacts** Add Person Remove

Export 12 total found Apply Filters Clear Filters Show: 20

Role	Person	Work Phone	Fax	Email	Primary Organization
<input type="checkbox"/>	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	FM Coordinator	Krueger,Paul	612/626-3830	eamteam@umn.edu	10273 - FM East Bank Dist Admin
<input type="checkbox"/>	Energy Resource	Jain,Nirmal	612/626-0645	eamteam@umn.edu	10307 - FM Facilities Engineering
<input type="checkbox"/>	Director	Everson,Scott	612/625-9818	eamteam@umn.edu	10251 - CPM Project Delivery
<input type="checkbox"/>	AVP	Amundson Gritters,Bruce	612/624-7501	eamteam@umn.edu	10251 - CPM Project Delivery
<input type="checkbox"/>	Assistant Project Manager	Bolles,Emily		eamteam@umn.edu	10251 - CPM Project Delivery
<input type="checkbox"/>		DeRuyscher,Kevin	612/626-0182	eamteam@umn.edu	10300 - FM Energy Management

6. Select the person to assign the role

Contact Role: 1068975 - DeRuyscher,Kevin-Capital Project-10000063-Pillsbury Hall Rehabilitation (AltFund)

General Audit Save Save & Close More

**Contact** Find Clear

\* Name DeRuyscher,Kevin ID 2444301

Primary Organization \Organizations\UMN\FMXXX - Facilities Management\Z0414 - FM Utilities Engineering\10300 - FM Energy Management

Email eamteam@umn.edu Mobile

Work Phone 612/626-0182 Work Fax

**Role** Find Clear

\* Role

Save Save & Close More

OK Export Cancel

**a** **b** **c**

Project Coordinator

Project Manager

Senior Project Manager

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.

Capital Project: 10000063-Pillsbury Hall Rehabilitation (AltFund)

General Scope Accounting Cost Accounting Schedule Budget Procurement Cash Flow **Contacts** Activate Calculate Save Save & Close More

(Optional): Maintain a list of Contacts and their roles for the Capital Project.

**Contacts** Add Person Remove

Export 12 total found Apply Filters Clear Filters Show: 20

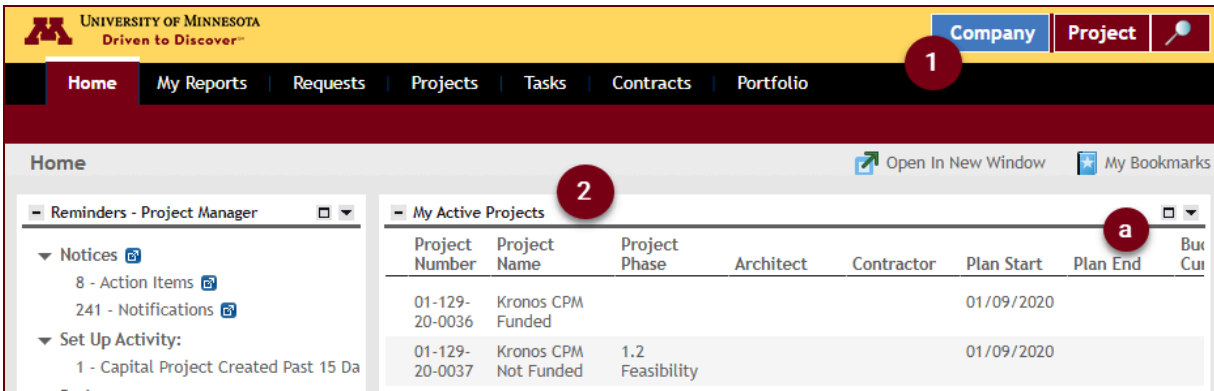
Role	Person	Work Phone	Fax	Email	Primary Organization
<input type="checkbox"/>	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Energy Resource	Jain,Nirmal	612/626-0645	eamteam@umn.edu	10307 - FM Facilities Engineering
<input type="checkbox"/>	Director	Everson,Scott	612/625-9818	eamteam@umn.edu	10251 - CPM Project Delivery
<input type="checkbox"/>	AVP	Amundson Gritters,Bruce	612/624-7501	eamteam@umn.edu	10251 - CPM Project Delivery
<input type="checkbox"/>	Assistant Project Manager	Bolles,Emily		eamteam@umn.edu	10251 - CPM Project Delivery
<input type="checkbox"/>	Project Manager	DeRuyscher,Kevin	612/626-0182	eamteam@umn.edu	10300 - FM Energy Management

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

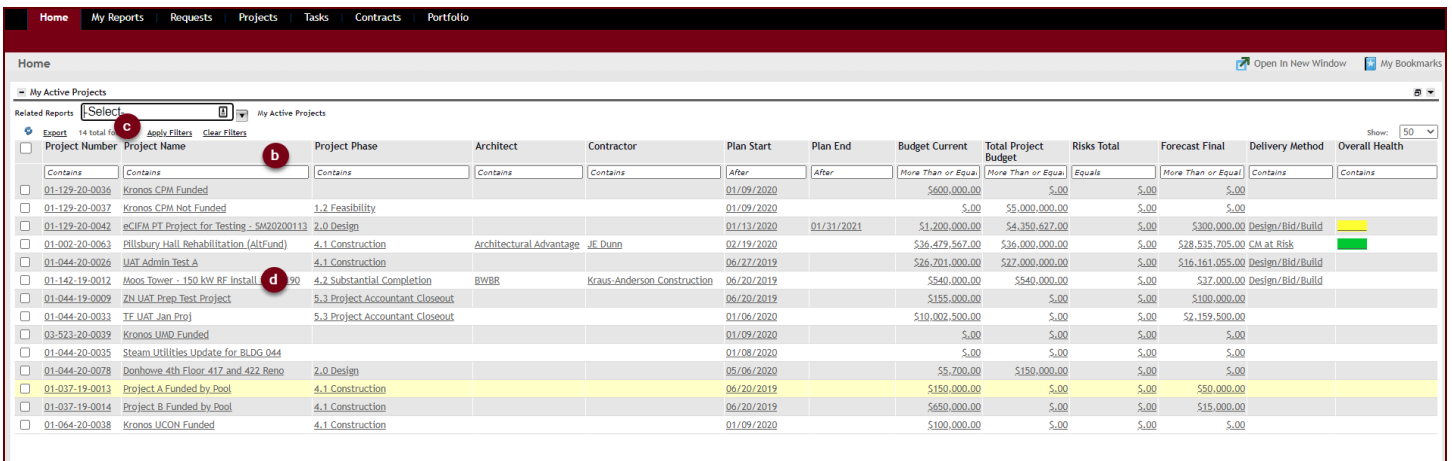
# Populate the Basic Project Record Fields

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.



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 not seen



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

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**.

Capital Project: 100000063-Pillsbury Hall Rehabilitation (AltFund)

General Scope Accounting Cost Accounting Schedule

Project Reporting Information

6

Include in Regents Report  
 Capital Budget Amendment (CBA)  
 Semi-Annual Report  
 State Designer Selection Board (SDSB)  
 Architect: Architectural Advantage  
 Total Project Budget: \$36,000,000.00  
 Project Manager Closeout:

Capital Oversight Group (COG)  
 Annual Capital Budget (ACB)  
 Board of Regents (BOR)  
 Buildings Benchmarks & Beyond (B3)  
 Contractor: JE Dunn  
 Occupancy: 08/27/20  
 Project Accounting Closeout:

a

6. **Project Reporting Section** enter values in the following fields (also, add any additional known field values):
- 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.

Capital Project: 100000063-Pillsbury Hall Rehabilitation (AltFund)

Scope Accounting Cost Accounting Schedule Budget

Project Budget

7

Export 1 total found Show: 10

ID	Type	Date	Name	Amount	Status
1000610	Project Original Budget	02/19/2020	Migration Budget - 01-002-15-2442	\$36,479,567.00	Issued

a

7. **Budget Section**

- Select the Project Original Budget to add values to cost codes

## Update the General Tab

Costs can be updated in the Original Cost column.

Project Original Budget: 1000623-0-U Con Standard Budget

General Spend Plan Notifications Notes & Documents Audit Actions

Issue Save Save & Close More x

(Required): Create an Project Original Budget by selecting budget codes and entering the desired amounts. This process can be done through several Project Original Budget documents to facilitate documentation and tracking. Select the Notifications tab to enter approval and distribution information for this document.

Items 8 Find Remove

Export 80 total found Apply Filters Clear Filters

	! Name	Cost Code ID	Labor Total	Material Total	Other Cost	Total Cost
			Equals	Equals	Equals	
<input type="checkbox"/>	Project Contingency	100000078-40	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Pre-Construction Services	100000078-10-00	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Specialties	100000078-10-10	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Pre-Design Services	100000078-20-50	\$,00	\$,00	\$5,700.00 US Dollars	\$5,700.
<input type="checkbox"/>	UMN Project Management Services	100000078-20-90	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Owner-Furnished Products	100000078-30-70	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Project Contingency	100000078-40-80	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	General Requirements	100000078-10-01-00	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Administrative Requirements: Project Management	100000078-10-01-30	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Regulatory Requirements: Permit	100000078-10-01-40	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Site Construction - Existing Conditions	100000078-10-02-00	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Facility Remediation	100000078-10-02-80	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Concrete	100000078-10-03-00	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Masonry	100000078-10-04-00	\$,00	\$,00	\$,00 US Dollars	\$,
<input type="checkbox"/>	Metals	100000078-10-05-00	\$,00	\$,00	\$,00 US Dollars	\$,

### 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.

Capital Project: 100000063-Pillsbury Hall Rehabilitation (AltFund)

General Scope Accounting Cost Accounting Sched Activate Calculate Save Save & Close More x

(Optional): Describe the scope of the project. This information is used in Progress Reports and for publishing the project website.

9

Scope Description Building rehabilitation a

Project Photo b

10

Site Information

Site Gross Area	0	acres	Site Usable
Project Gross Construction Area	0	square-feet	Project Usable Construction
Total Floor Area Ratio	0		

### 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.