

Material Format: Live Training

Title	Material Format	Description
<a href="#">Advanced Purchase Orders</a>	Live Training	<p>This live course will provide a deeper dive into creating purchase orders in TRIRIGA and includes practice activities to hone your skills.</p> <p>Live training is available on an as-needed basis. Contact TRIRIGATraining@umn.edu to request one-on-one or small group training sessions for this course.</p>
<a href="#">Inventory in TRIRIGA</a>	Live Training	<p>In this session, facilities management staff will learn how to find inventory items in U Market's catalog, request parts for a work task, and remove items that are no longer needed.</p> <p>Live training is available on an as-needed basis. Contact TRIRIGATraining@umn.edu to request one-on-one or small group training sessions for this course.</p>

Material Format: eLearning Course

Title	Material Format	Description
<a href="#">TRIRIGA 101</a>	eLearning Course	<p>In the fall of 2020, the University of Minnesota implemented TRIRIGA, a new software system that will help us better manage our assets. This course will help you understand why we made this change, and will walk through a simulation of the software. <b>This course is a prerequisite for all other training</b> and should take approximately 30 minutes to complete.</p>

Title	Material Format	Description
<a href="#">Contracts</a>	eLearning Course	This course will instruct how to work with Contracts in TRIRIGA. Topics will include new terms, creation of Contracts, Contracts approval workflow and approving Contracts.
<a href="#">Introduction to Purchase Orders</a>	eLearning Course	Learn how to work with Purchase Orders in TRIRIGA. This course covers using purchase orders from within a Work Task. When done you will understand the different types of Purchase Orders, how to create and track as well as receive Purchase Orders.
<a href="#">Key Management for DFRs</a>	eLearning Course	This course teaches how to create a request for a key and track the status of your key request. You will also learn how to assign a new key holder to a key and record a change in the key holder. At the conclusion of the instruction, you will practice submitting a Key Request in the TRIRIGA training environment. It is recommended you complete the Create a Service Request course before Key Requests.
<a href="#">Key Project Concepts</a>	eLearning Course	In this introductory online course, we will define what projects are and how to find them in TRIRIGA. In addition, we will walk you through the different parts of a project record. We will also identify project users and explore the difference between Company Focus and Project Focus and when to use them. This course should take approximately 15 minutes to complete.
<a href="#">Navigate to a Space Record</a>	eLearning Course	From this course you will learn how to use TRIRIGA to find your space records, organize your records, and use the floor plan graphic.

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<a href="#"><u>Project Requests</u></a>	eLearning Course	This course will review how to create and monitor project requests.
<a href="#"><u>Revising a Space Record</u></a>	eLearning Course	You will learn how allocations are structured, which data fields are in each section of the record, and how to revise the common elements of a space record like departments, function codes, and occupants. This will give you an overview of how to complete space Survey in TRIRIGA.
<a href="#"><u>RRC Portfolio Plan Concept</u></a>	eLearning Course	This course will review how to create and monitor an RRC Portfolio Plan Concept.
<a href="#"><u>Service Requests</u></a>	eLearning Course	Learn how to Create a Service Request from Request Central for yourself or on behalf of someone else. Service Requests will often become work tasks that are used to commission the facility staff to complete the request. After completing the short tutorial, you will practice creating your first Service Request in the TRIRIGA training environment. This course should take approximately 30 minutes to complete.
<a href="#"><u>Starting a Project</u></a>	eLearning Course	In this online course, we will be walking you through the process of creating a project record. We will cover steps such as applying a template, activating a project, and assigning a project team. In addition, we will demonstrate how to populate project record basics. This course should take approximately 15 minutes to complete.

<b>Title</b>	<b>Material Format</b>	<b>Description</b>
<a href="#"><u>Work Management for Workers</u></a>	eLearning Course	Frontline Facilities Management staff will learn how to use TRIRIGA to accomplish core activities: find worktasks assigned to oneself, document notes, time worked, look up data on equipment and assets, view Purchase Orders, and add and return inventory items to a work task.
<a href="#"><u>Work Task Lifecycle</u></a>	eLearning Course	This course will introduce you to work tasks in TRIRIGA. You will learn the methods to create a work task, the phases of a work task and their associated activities. To further deconstruct the work task, we examine its states and the actions that take place in each state. This course is foundational and required before you proceed to Work Management.

Material Format: Reference Guide

<b>Title</b>	<b>Material Format</b>	<b>Description</b>
<a href="#"><u>Add or Remove an Occupant in TRIRIGA Space Survey</u></a>	Reference Guide	Adding or removing an occupant record inside a space departmental assignment record.
<a href="#"><u>Adding &amp; Updating Employee Licensure Information in TRIRIGA - Job Aid</u></a>	Reference Guide	Certain administrative staff have the ability to add and/or edit License and Qualification information stored on the Confidential tab of the employee record. This guide provides the steps to add and edit the required fields.
<a href="#"><u>Allocating Funding Sources</u></a>	Reference Guide	Use the following procedures and steps for allocating a funding source to a project.

Title	Material Format	Description
<a href="#">Approvals - Delegation</a>	Reference Guide	This transaction provides the ability to change an approver temporarily. Delegation could be used to temporarily assign approval to another approver
<a href="#">Assign Project Requests</a>	Reference Guide	This document will provide Project Intake Coordinators instructions to create Projects from approved Project Requests (PR). This guide also connects to <a href="#">Create a Work Task</a> if a PR is actually a request for Facilities work.
<a href="#">Assign resources to work tasks</a>	Reference Guide	This guide describes how to find tasks that have been assigned to you. It also provides steps for frontline facilities staff to assign themselves or others to work tasks.
<a href="#">Billing Batch and Billing</a>	Reference Guide	The purpose of this document is to instruct users on how to generate billing batches, review exceptions, and bill vendors.
<a href="#">Chart Strings: Viewing and Editing</a>	Reference Guide	Chart Allocation tab exists on every record and form. It contains the chart strings and account numbers used in the General Ledger. Your ability to edit it depends on your security setting and role in TRIRIGA. The tab can be viewed by anyone interested in seeing the chart string information.
<a href="#">Create an Asset/Equipment Record</a>	Reference Guide	Learn how to set up an asset or equipment record.
<a href="#">Create an Asset/Key Record</a>	Reference Guide	After completing the DFR eLearning module, this document will teach you how to create an asset/key record

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<a href="#">Create and Access Building Assessment and Building Opportunity</a>	Reference Guide	This document will provide users the instructions necessary to access data about Buildings and create, update, prioritize and retire Opportunities.
<a href="#">Create and Track a Project Request</a>	Reference Guide	This document will provide users the instructions necessary to create and track a project request.
<a href="#">Create and Track a Service Request</a>	Reference Guide	<p>Instructions on how to Create a Service Request from Request Central for yourself or on behalf of someone else. Service Requests will often become work tasks that are used to commission the facility staff to complete the request.</p> <p>*If you are unable to access Request Central in TRIRIGA visit the <a href="#">USIT Request Form</a>.</p>
<a href="#">Create Preventive Maintenance Schedules</a>	Reference Guide	Learn how to create a Preventative Maintenance job plans using completion, reading or schedule-based criteria.
<a href="#">Create Work Tasks</a>	Reference Guide	This guide describes the basic steps on how to create a work task. The guide starts the end users from the Work Task Portal.
<a href="#">Creating a Funding Source</a>	Reference Guide	Use the following procedures and steps to create a new Funding Source before allocating it to a project.

Title	Material Format	Description
<a href="#">Enter and Manage Confidential Employee Information</a>	Reference Guide	Anyone can go in and add their own confidential information through their profile. Certain staff have the ability to add and view confidential contact information for others in TRIRIGA. This guide provides instructions for both. The confidential information is encrypted in the employee's profile.
<a href="#">Generate Billing Batches and Billing</a>	Reference Guide	The purpose of this document is to instruct users on how to generate billing batches, review exceptions, and bill vendors.
<a href="#">GL Correction on a work task</a>	Reference Guide	This guide will provide instructions on how to make a GL correction.
<a href="#">Internal Service Agreement (ISA)</a>	Reference Guide	This guide outlines the steps for to create ISA contracts, issue ISAs and associate with work tasks. The Primary audience is CPM Projects staff. Secondary audience is UConstruction, Energy Management and Facilities Management.
<a href="#">Inventory Management Overview</a>	Reference Guide	This document walks through the steps required for inventory management processes.
<a href="#">Invoice Approval</a>	Reference Guide	This document illustrates the steps taken by an Invoice approver.
<a href="#">Invoicing</a>	Reference Guide	This document illustrates the steps to create Purchase Order, Non-Purchase Order, and Standard Contract Invoices.

<b>Title</b>	<b>Material Format</b>	<b>Description</b>
<a href="#"><u>Keys Management for DFR</u></a>	Reference Guide	Instruction for DFRs on how to manage key records in TRIRIGA.
<a href="#"><u>Lease Setup</u></a>	Reference Guide	This guide walks through the basic steps required to complete the initial setup for a Real Estate Lease.
<a href="#"><u>Miscellaneous Costs</u></a>	Reference Guide	Miscellaneous costs transactions are for charging items i.e. equipment usage, bulk materials. It can also be used to charge service fees where there are published rates i.e. lab fees, key cutting. The transaction is completed in a work task. To facilitate the transaction the Expenditure type determines the chart string and sometimes the amount if it is associated with a pre-loaded rate. The Work Task chart string is charged the amount.
<a href="#"><u>Mobile Work Processes</u></a>	Reference Guide	TRIRIGA users with mobile access will learn how to use the app for creating, updating work tasks. The mobile app makes it easy to record time worked, download work and mark work done.
<a href="#"><u>Navigating to Space Records</u></a>	Reference Guide	How to navigate space data using TRIRIGA.
<a href="#"><u>Notes and Documents Tab</u></a>	Reference Guide	This guide details how to use the Notes and Documents Tab.
<a href="#"><u>Using Perceptive Content</u></a>	Reference Guide	This document details how to use Perceptive Content for Accounts Payable.



<b>Title</b>	<b>Material Format</b>	<b>Description</b>
<a href="#"><u>Portal Tips</u></a>	Reference Guide	This guide will provide tips to more efficiently and effectively use TRIRIGA.
<a href="#"><u>Problem, Cause, Remedy (PCR) &amp; Mark Work Task Done</u></a>	Reference Guide	This guide describes all necessary processes as they relate to work tasks intended for frontline facilities staff.
<a href="#"><u>Project Budgets</u></a>	Reference Guide	This guide walks through the steps required to complete the Budget for a Project.
<a href="#"><u>Project Closeout for Project Accountants</u></a>	Reference Guide	Use this guide when a project is moved into the Project Closeout phase by the Project Manager.
<a href="#"><u>Project Request Routing and Approval Process</u></a>	Reference Guide	This document will provide users the instructions necessary to review, approve, and route Project Requests (PR).
<a href="#"><u>Purchase Order (PO) &amp; Change Order (CO) NOT associated with a Work Task</u></a>	Reference Guide	This guide walks through the steps required to create and track Purchase Orders and Change Orders through the Requisitions and Purchase Orders portal. This document is for District Admins (FM) and the Call Center.
<a href="#"><u>Purchase Order from a Work Task</u></a>	Reference Guide	This guide walks through the steps required to create and track Purchase Orders and Change Orders for Non-Catalog Parts and Services. The primary audience is Facilities Management staff.
<a href="#"><u>Purchase Order or Standard Contract Approver</u></a>	Reference Guide	This document illustrates the steps required to approve a Purchase Order or Standard Contract.

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<a href="#"><u>Purchase Orders for Inventory Staff</u></a>	Reference Guide	This guide walks through the steps required to create and track Purchase Orders and Change Orders and manage Replenishment Batching for inventory buyers.
<a href="#"><u>Real Estate Purchase Order</u></a>	Reference Guide	This guide walks through the steps required to create and track Purchase Orders and Change Orders for Real Estate.
<a href="#"><u>Request Catalog Parts</u></a>	Reference Guide	This guide describes how to request parts or remove your request. If you have requested parts and they are issued. They can not be removed. Ask your supervisor to return the parts for you.
<a href="#"><u>Request Inventory Parts</u></a>	Reference Guide	This guide describes how to request parts or remove your request. If you have requested parts and they are issued. They can not be removed. Ask your supervisor to return the parts for you.
<a href="#"><u>Respond to a Key Request</u></a>	Reference Guide	After completing the DFR eLearning module, this document will teach you how to approve, deny, or clarify a key request in TRIRIGA.
<a href="#"><u>Reverse and Rebill - Billing</u></a>	Reference Guide	The purpose of this document is to instruct users on how to reverse and rebill vendors.
<a href="#"><u>Revising Space Records</u></a>	Reference Guide	Understanding a Space Record

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<a href="#">RRC Portfolio Plan Concept</a>	Reference Guide	This document will provide users the instructions necessary to create and monitor the status of RRC Portfolio Plan Concepts.
<a href="#">Standard Contracts and Contract Change Orders</a>	Reference Guide	This document will provide project managers, and their team, information on creating contracts and changing contracts. See <a href="#">Internal Service Agreements</a> (ISA) for more detailed information pertaining to that type of contract.
<a href="#">Starting a Project</a>	Reference Guide	This document will provide Project Managers, and their team, information on assigning contact roles and starting a project after project initiation (CPR).
<a href="#">Time Entry from within Work Task - Desktop</a>	Reference Guide	Learn how to enter time against a work task from within the work task. NOTE: Once you add a time log to a work task, you CAN NOT be removed as a resource. The removal of the resource will disconnect the time entry from the work task.
<a href="#">Time Sheet Entry for Activity - Desktop</a>	Reference Guide	Learn how to enter time on the desktop for an activity.
<a href="#">Time Sheet Entry for Work Task - Desktop</a>	Reference Guide	Learn how to enter time on the desktop for a work task, using time sheet entry. NOTE: Once you add a time log to a work task, you CAN NOT be removed as a resource. The removal of the resource will disconnect the time entry from the work task.

Title	Material Format	Description
<a href="#">UMN Space Viewer Overview Video</a>	Reference Guide	Navigate to and understand basic functionality of UMN Space Viewer.
<a href="#">UMN Space Viewer Print Guide</a>	Reference Guide	How to print floor plans in UMN Space Viewer.
<a href="#">UMN Space Viewer Quick Start</a>	Reference Guide	Navigate to and understand basic functionality of UMN Space Viewer.
<a href="#">Vendor Details</a>	Reference Guide	This document explains the process of viewing and updating vendor information.
<a href="#">Vendor Maintenance</a>	Reference Guide	This document will provide users the instructions necessary to add and view vendor information and external contacts.
<a href="#">Verify ISA Funding Allocation</a>	Reference Guide	<p>The purpose of the this document is to confirm available funding is in place before activating a project related ISA type work task in TRIRIGA.</p> <p><b>Following the steps will save you additional work later!</b> If funding is not present when an ISA type work task is activated it may capture the building account string and require manual adjustment to chart strings.</p>

Title	Material Format	Description
<a href="#">Work Management for Supervisors</a>	Reference Guide	Supervisors and lead staff in Facilities Management will learn how to use work tasks in TRIRIGA. This document covers items that are specific to staff that can process time corrections, add or change chart strings, and review work tasks marked done. It will also cover how to find or adjust information associated with any work task assigned to your team.
<a href="#">Work Tasks for External Customers</a>	Reference Guide	This guide describes the basic steps on how to create a work task for external customers. The primary audience for this Facilities Management administrative staff in the Districts, Sign Shop, Landcare, Energy Management.
<a href="#">Zoom instructions for TRIRIGA training</a>	Reference Guide	For the time being, due to the risks associated with COVID-19, all live TRIRIGA training will be delivered virtually using Zoom. Instructions and training for Zoom are provided by OIT. This document aggregates available resources to assist all TRIRIGA users in successfully attending virtual training sessions. Find more resources at <a href="http://it.umn.edu">it.umn.edu</a> .