

IBM TRIRIGA Application Platform  
Version 3.2

*Upgrade  
User Guide*



**Note**

Before using this information and the product it supports, read the information in "Notices" on page 23.

This edition applies to version 3, release 2, modification 0 of IBM® TRIRIGA® Application Platform and to all subsequent releases and modifications until otherwise indicated in new editions.

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# About This Guide

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This guide provides a quick reference for IBM TRIRIGA Application Platform 2.7.2 users now working in an IBM TRIRIGA Application Platform 3.2 environment. See the *IBM TRIRIGA 10 Getting Started User Guide* before this guide.

IBM TRIRIGA 9.7.1 / IBM TRIRIGA Application Platform 2.7.2 users now working in an IBM TRIRIGA 10.0 / IBM TRIRIGA Application Platform 3.2 environment should see the *IBM TRIRIGA 10 Getting Started User Guide* and the *IBM TRIRIGA 10 Upgrade User Guide*.

Application administrators responsible for the upgrade from an IBM TRIRIGA 9.7.1 / IBM TRIRIGA Application Platform 2.7.2 environment to an IBM TRIRIGA Application Platform 3.2 or an IBM TRIRIGA 10.0 / IBM TRIRIGA Application Platform 3.2 environment should see the *IBM TRIRIGA 10 Getting Started User Guide* and the *IBM TRIRIGA Application Platform 3 Upgrade Administrator Guide*.

## Intended Audience

This guide is for users familiar with IBM TRIRIGA Application Platform 2.7.2 that are now working in an IBM TRIRIGA Application Platform 3.2 environment.

## Prerequisites

This guide assumes readers are familiar with the information in the *IBM TRIRIGA 10 Getting Started User Guide* and with the implementation of IBM TRIRIGA in their company.

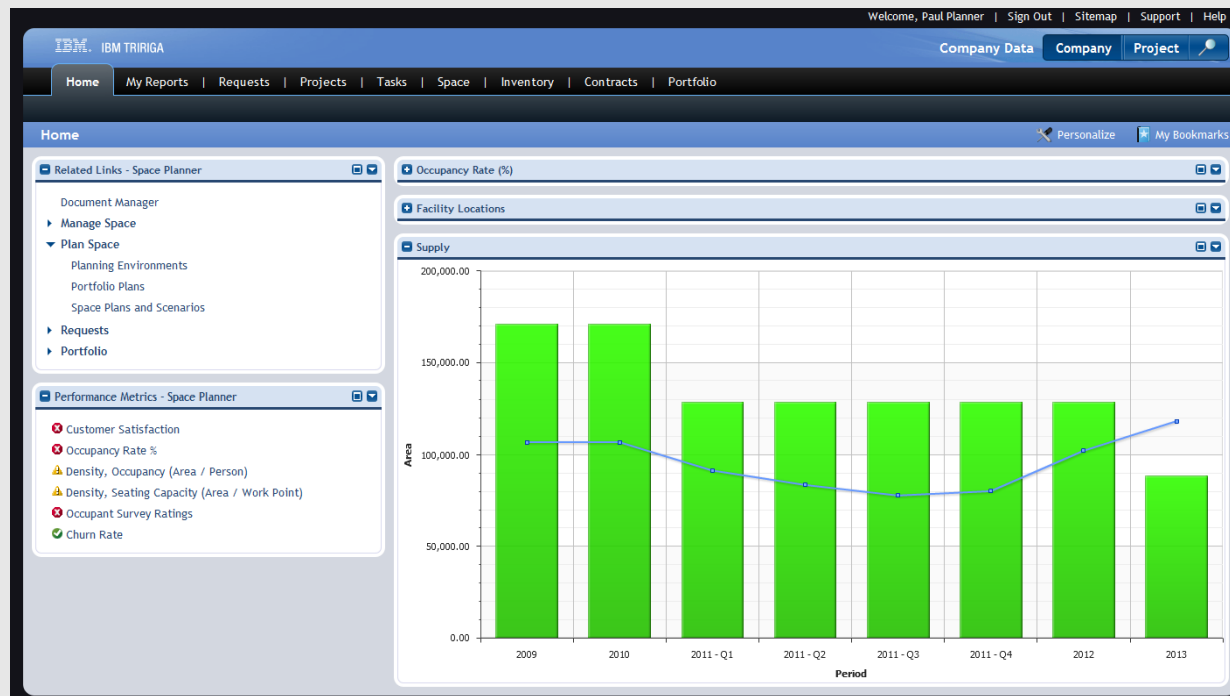
## Support

IBM Software Support provides assistance with product defects, answering FAQs, and performing rediscovery. View the IBM Software Support site at [www.ibm.com/support](http://www.ibm.com/support).

# 1. Overview

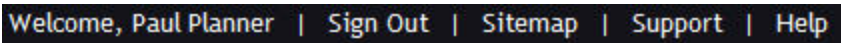

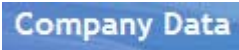
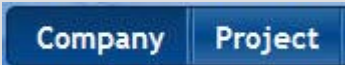


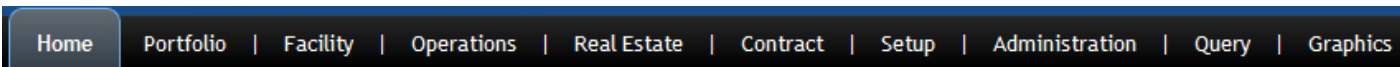

The following chapters serve as a quick reference for users familiar with IBM TRIRIGA Application Platform 2.7.x. You will find a comprehensive description of the uses of IBM TRIRIGA Application Platform 3 in the *IBM TRIRIGA 10 Getting Started User Guide*. It is not the purpose of this guide to replicate that material but, rather, to provide a tool for users looking for a quick start for familiar work patterns.

A number of terms have specific meanings in IBM TRIRIGA Application Platform 3.



Example of Home Page

The following terms apply to the components of the example shown above:

Term	Description
Welcome Bar	
Header	
Company Name	
Company   Project Toggle	
Project Selector Icon	
Project Name	 <p>When you select a project, the system displays the <i>Project Name</i>, which shows the project id and project name.</p>
Menu Bar	
Menu Item	Home, Portfolio, Facility, Operations, and so on, in the menu bar are <i>Menu Items</i> .
Page Title Bar	
Page Content	Everything below the Page Title Bar.

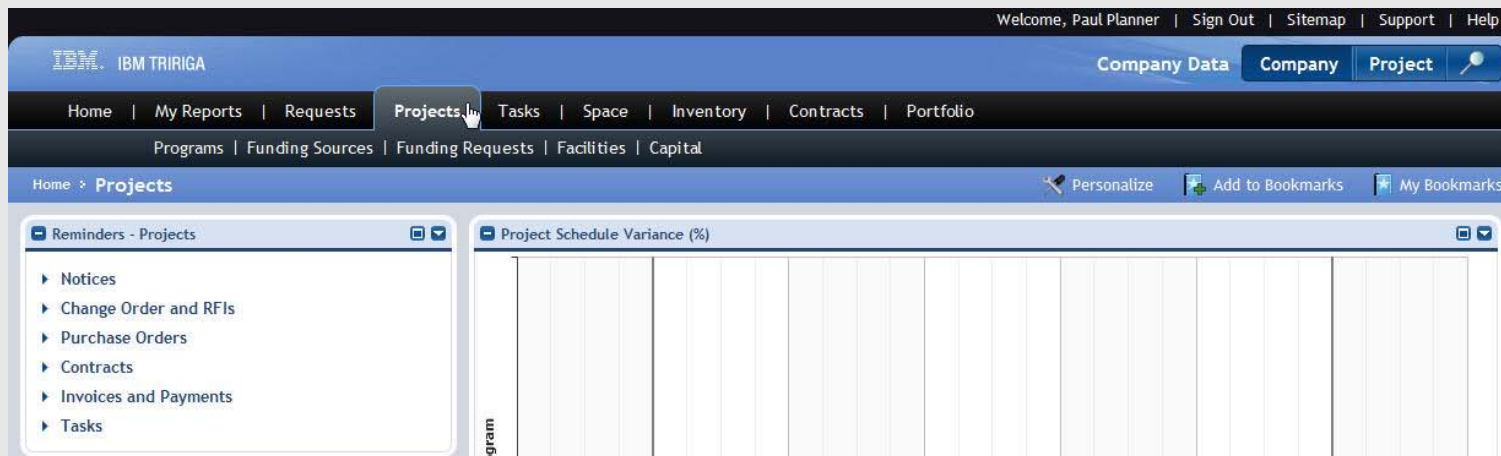
Term	Description
------	-------------

Portal Section



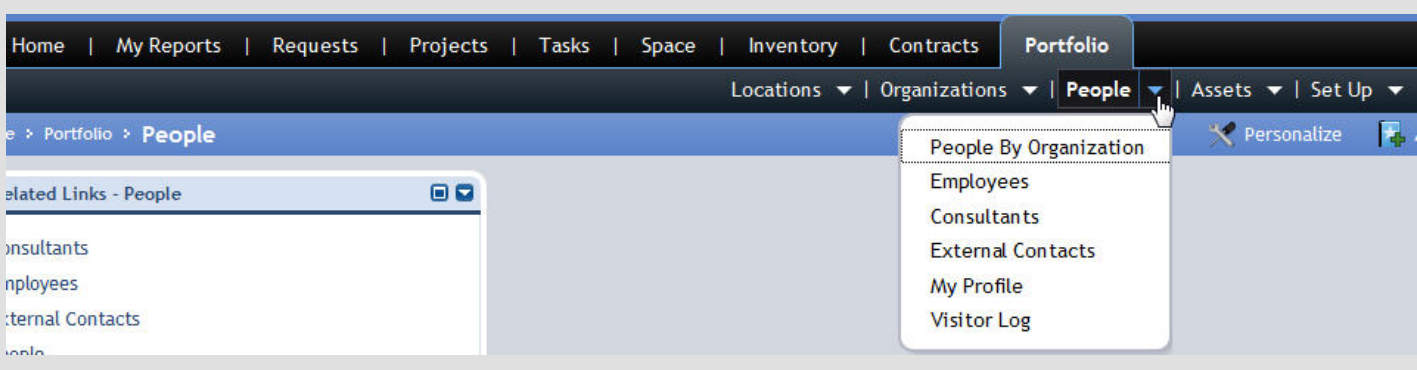
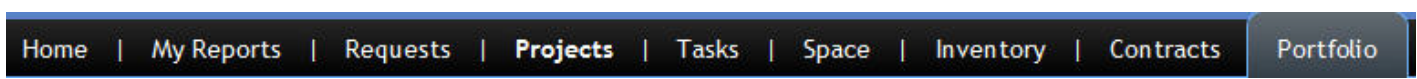
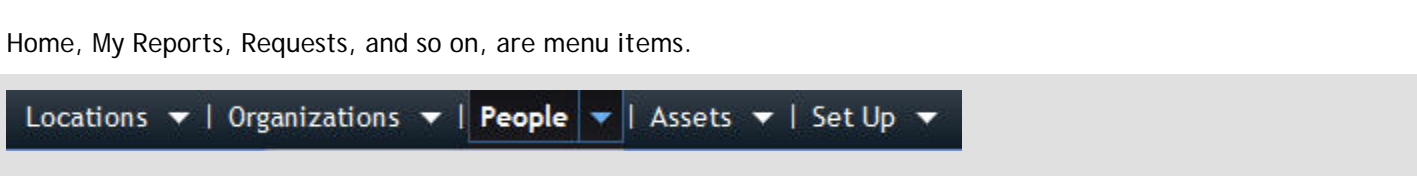
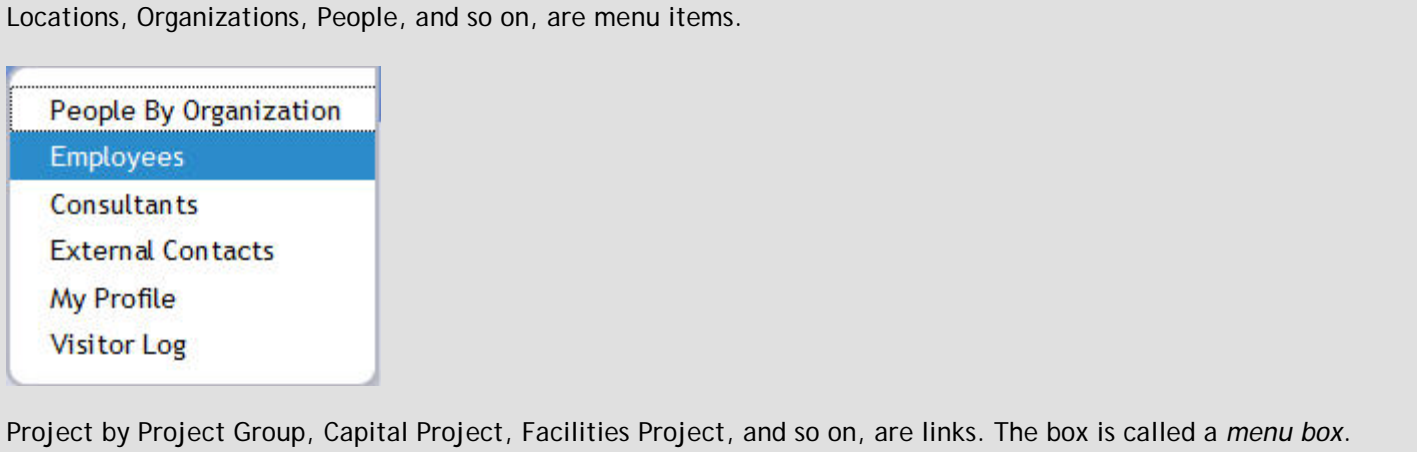
Link Each item inside a portal section is a *link*.

When you select a menu item, the portal changes to the item page of the item you have selected.



Example of Page

The following terms apply to the components introduced in the example:

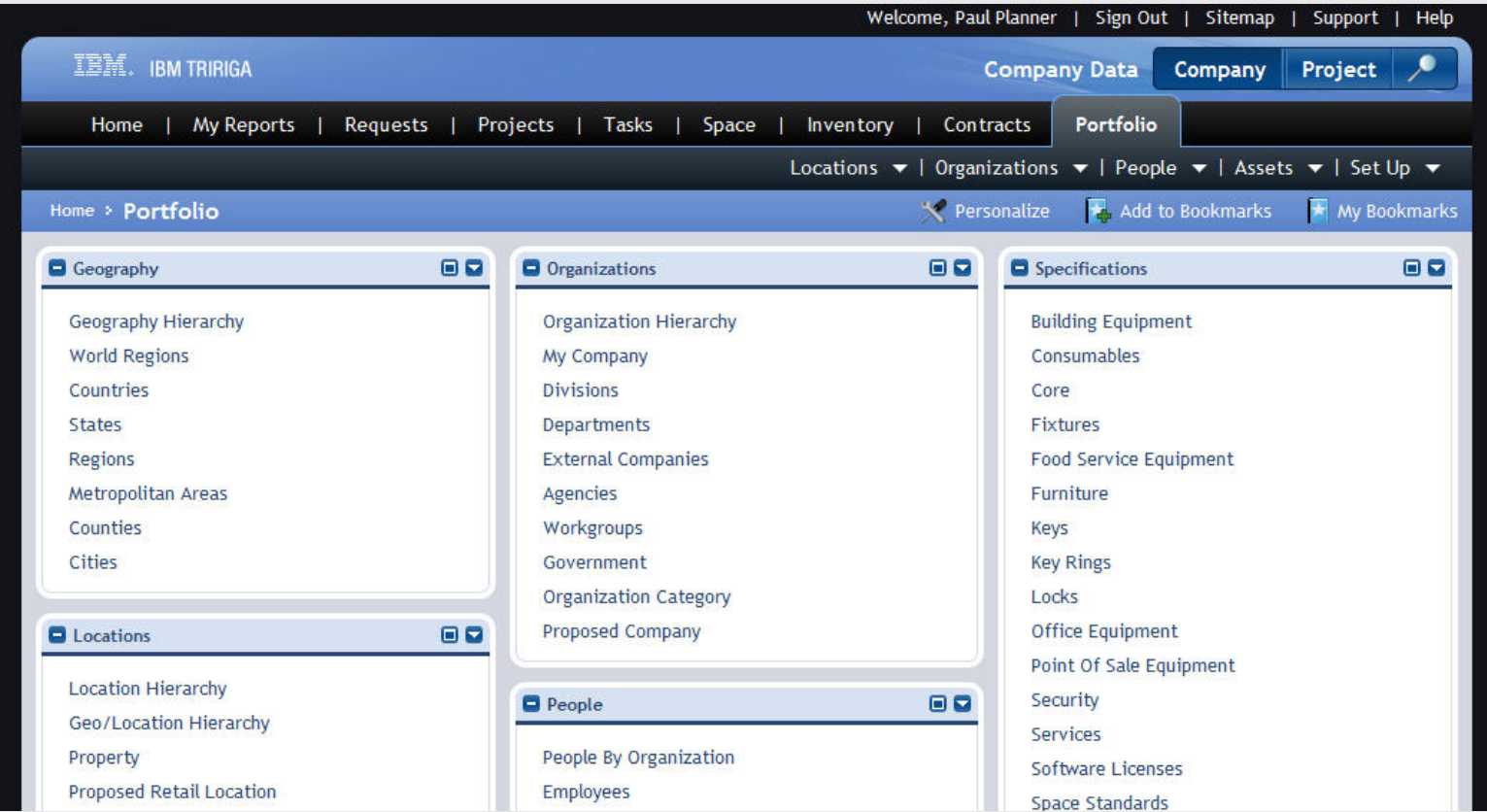
Term	Description
Menu Bar	
First Level of the Menu Bar	 <p data-bbox="485 781 1171 824">Home, My Reports, Requests, and so on, are menu items.</p>
Second Level of the Menu Bar	 <p data-bbox="485 943 1220 987">Locations, Organizations, People, and so on, are menu items.</p>
Third Level of the Menu Bar	 <p data-bbox="485 1349 1829 1393">Project by Project Group, Capital Project, Facilities Project, and so on, are links. The box is called a <i>menu box</i>.</p>



Term	Description
Breadcrumb	

Breadcrumbs give the user a view of where they are in the navigation hierarchy and provide access to higher levels of the navigation hierarchy from the current location. Clicking any part of a breadcrumb takes you to that page.

When you click a menu item, the *navigation page* is displayed.



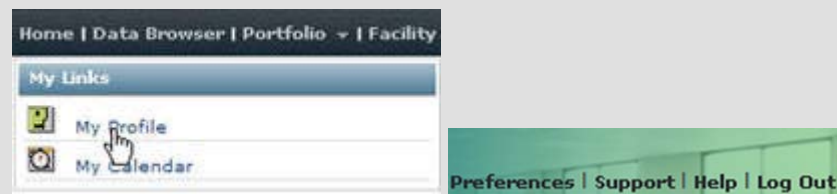
Example of Navigation Page

## 2. Portal

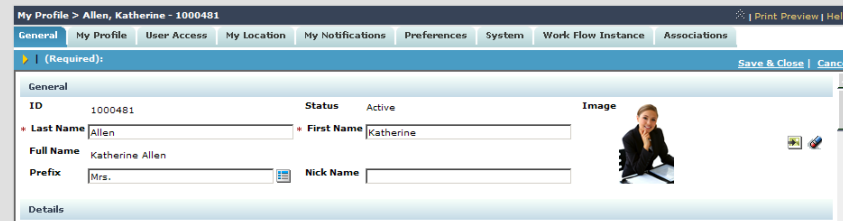
This chapter illustrates how to find familiar places in your portal.

Then

Accessed My Profile from the My Links portal section and the Preferences portal actions:

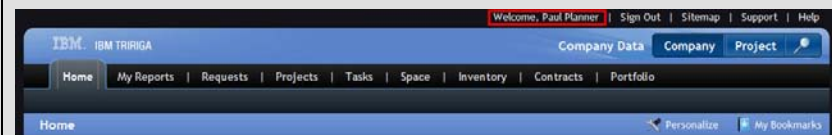


The system displayed your My Profile page.



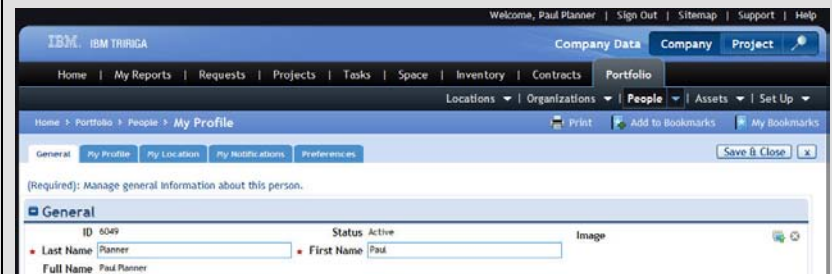
Now

To access your My Profile page, click "Welcome, <Your Name>" in the welcome bar.



If you have access to the Portfolio first level menu, you can also access your My Profile page by clicking Portfolio > People > My Profile.

The system displays your My Profile page.





## Then

Data Browser was in the menu bar, next to Home.

The system displayed the following:



Clicked the Find Project icon  to select a project in the Project Bar.

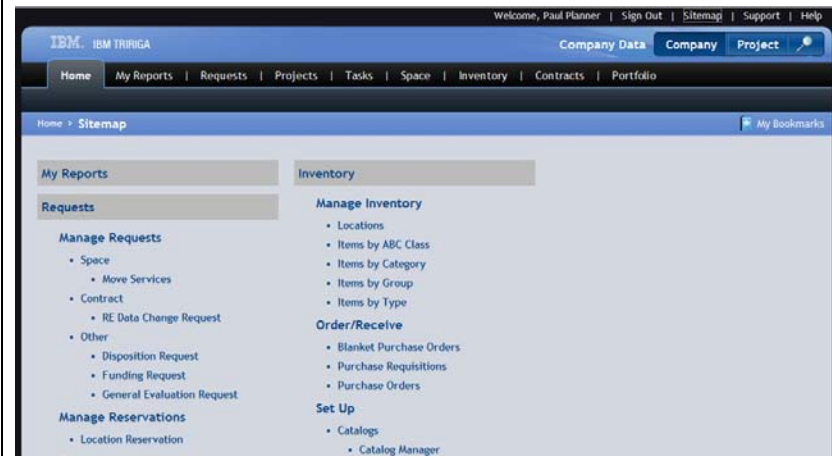
Clicked the Clear Project icon  to return to Company Level.

## Now



Select Sitemap in the welcome bar.



The system displays the sitemap. Each item in the sitemap is a link.



In the sitemap, you can use the browser Find functionality to locate the link you want.

To select a project, either click **Project** in the Company|Project toggle  or click the Project Selector icon . Select the project from the list.

To return to the Company level, click **Company** in the Company|Project toggle.

## Then

You saved links to other places in TRIRIGA in My Favorites, Shortcuts, and Quick Add.



## Now

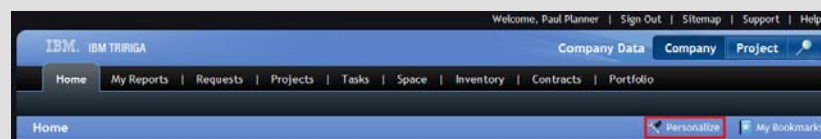
Save links to pages in My Bookmarks. My Bookmarks contains your old My Favorites, Shortcuts, and Quick Add. My Bookmarks gives you the ability to access your favorite and frequently-used pages with one click.



For more information about bookmarks, see the *IBM TRIRIGA 10 Getting Started User Guide*.

You used the standard portal home page that was assigned to your user.

If you click Personalize on the page title bar, you can rearrange, add or delete portal sections, change the column layout, or restore the default home page.



## Then

The screenshot shows a web-based interface with a top navigation bar containing various menu items like Home, Data Browser, Portfolio, Facility, Operations, Real Estate, Contract, Setup, Administration, Query, and Project Company Level. The main content area is divided into several sections: 'My Goals' with links to My Profile and My Calendar; 'Self Service' with icons for Facility Requests, Human Resource Requests, IT & Phone Requests, Office Services Requests, Real Estate & Space Requests, and Store Requests; 'My Favorites' with links to Budget, Contract, and Specification; 'Action Items' table with columns for Action, Type, Due, Status, and From; 'Self Service Requests' table with columns for Building, Director, and Escalation Director; 'Last Worked' table with columns for Building, Building ID, Date, and Subject; and 'Company News' table with columns for Date and Headline.

## Now

The screenshot shows a personalized interface titled 'Personalize: Home' with 'Save' and 'Cancel' buttons. Below the title is a 'Column Layout' selector with options: One, Two Equal, Two 20/70 (selected), Three Equal, and Three 20/40/20. The main content area includes 'Related Links - Space Planner' with a list of links, 'Performance Metrics - Space Planner' with a list of metrics, and 'Occupancy Rate (%)' with a line graph showing two data series (blue and orange) over time. The graph's y-axis ranges from 20.00 to 80.00. A 'Restore To Default' button is located at the bottom right.

For more information about personalization, see the *IBM TRIRIGA 10 Getting Started User Guide*.

### 3. Menus

This chapter illustrates how to find your data.

#### Then

To open a furniture record:

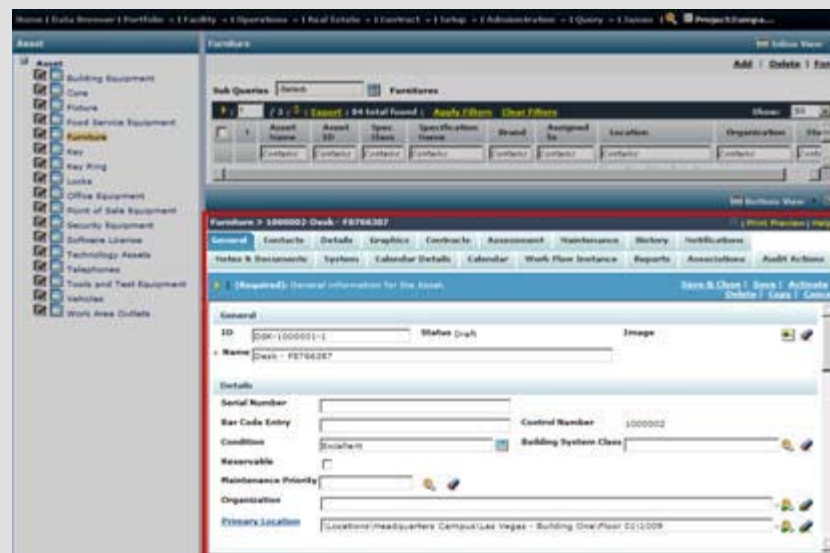
Clicked **Portfolio**, or the arrow next to Portfolio.

Clicked **Asset Manager**.

Clicked **Furniture**.

Clicked the hyperlinked Asset Name.

The furniture record opened in the same page (popup view available).



#### Now

To open a furniture record, you can [hover](#) or use [clicks](#).

1. Have your mouse hover over the Portfolio menu item on the first level of the menu bar. Select the arrow next to the Asset menu item on the second level of the menu bar.

Click **Furniture** in the third level of the menu bar.

Click the hyperlinked Asset Name.

The furniture record opens in the same page (popup view available).

or

2. Select the Portfolio menu item on the first level of the menu bar.

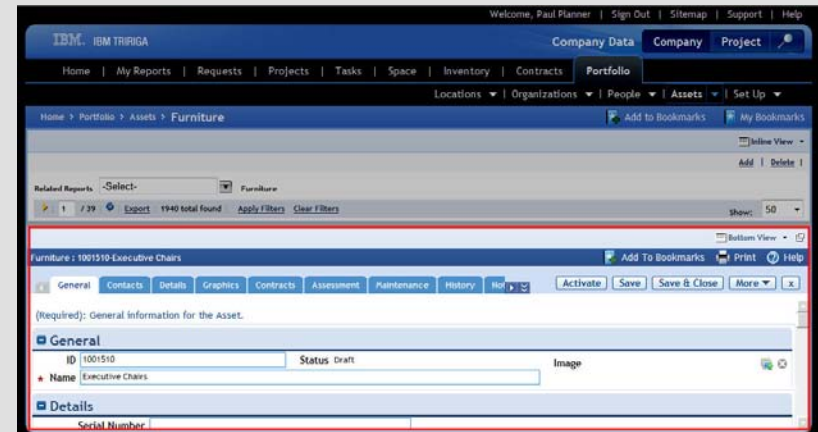
In the list under Asset, click **Furniture**.

Click the hyperlinked Asset Name.

The furniture record opens in the same page (popup view available).

Then

Now



Once you have reached the record, you can bookmark the page for quick access. For more information about bookmarks, see the *IBM TRIRIGA 10 Getting Started User Guide*.

To view the hierarchy of a hierarchical module such as Location:

Clicked the Portfolio menu item.

Clicked **Location Manager**.

Selected **Location**.

The Hierarchy View displayed.

To view the hierarchy of a hierarchical module such as **Location**:

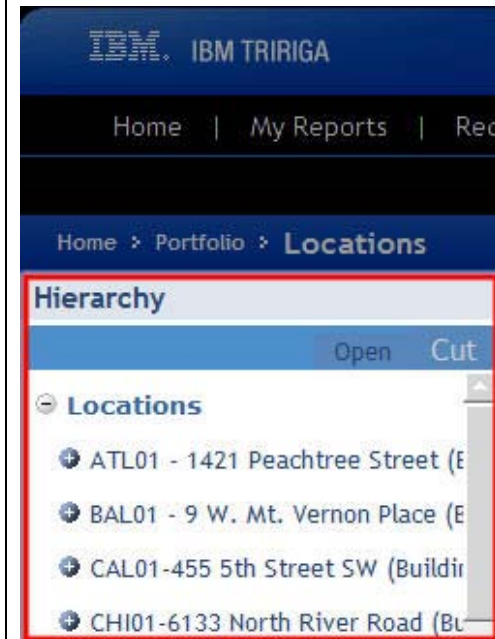
Have your mouse hover over the **Portfolio** menu item on the first level of the menu bar and select **Location** menu item on the second level of the menu bar.

The system displays the Hierarchy View.

Then



Now



You can bookmark this page for quick access. For more information about bookmarks, see the *IBM TRIRIGA 10 Getting Started User Guide*.



## 4. Reports


This chapter illustrates how to run a report. For more details about running a report, see the *IBM TRIRIGA Application Platform 3 Reporting User Guide*.

### Then

To run a report associated with a specific manager:

Assume you wanted to run the Employee Directory report. Clicked the arrow next to the menu, in this example, Portfolio, and clicked the manager, in this example, the People Manager.

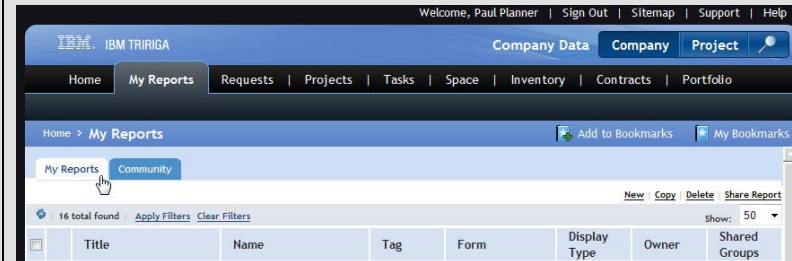



Selected the View Reports Icon  for the report business object, in this example, Employee.

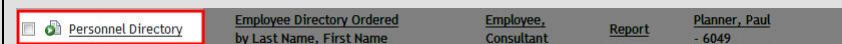
### Now

To run a report:

Assume you want to run the Personnel Directory report. Click the **My Reports** first level menu, and select **My Reports** tab.



Find the report you want to run, in this case the Personnel Directory report, and click the run report icon  next to the link.



You can bookmark the report for quick access. For more information about bookmarks, see the *IBM TRIRIGA 10 Getting Started User Guide*.

Then



Selected the report radio button and clicked Run Report.



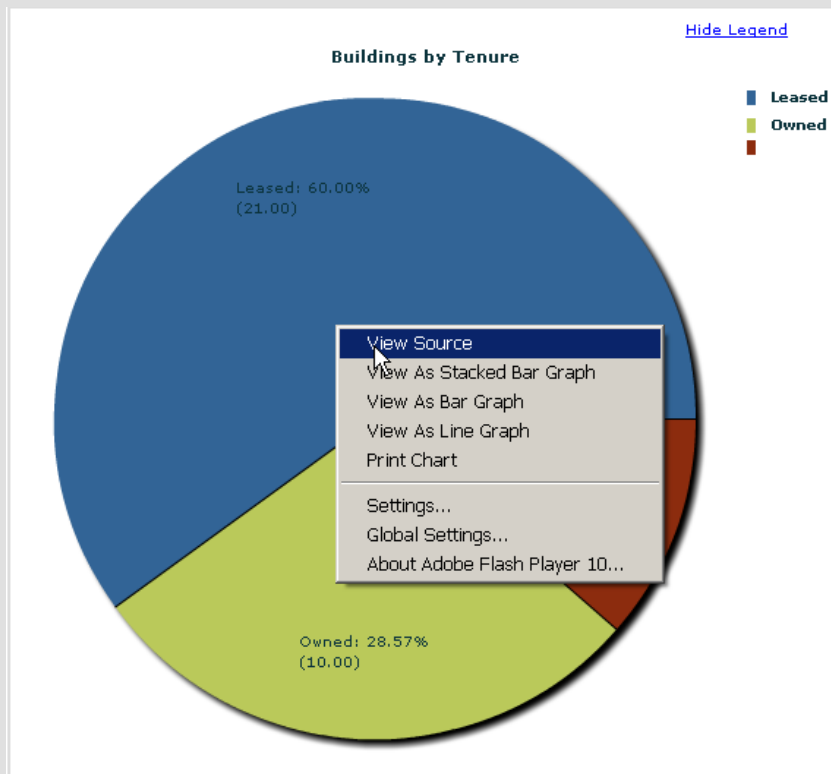
Now

## 5. Charts

This chapter illustrates how to find familiar places in charts.

### Then

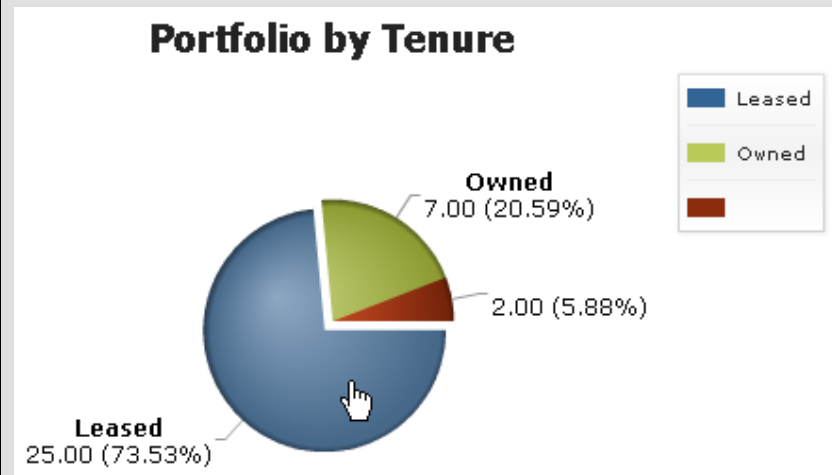
To view the data from the query used to create a chart, from the chart, right clicked and selected View Source.



The data displayed in a separate window.

### Now

To view the data from the query used to create a chart, click anywhere in the chart.



The data displays in a separate window.

Then

[Export](#) [Cancel](#)

### Buildings by Tenure

Date : 10/04/2010 10:33 AM

### Buildings by Tenure

[Apply Filters](#) [Clear Filters](#)

!	Image	Name	Tenure
		<input type="text" value="Contains"/>	<input type="text" value="Contains"/>
		<a href="#">USA</a>	<a href="#">Leased</a>
		<a href="#">Atlanta Office</a>	
		<a href="#">Australia Office</a>	
		<a href="#">Chicago Office</a>	
		<a href="#">Dallas Office</a>	
		<a href="#">Denmark Office</a>	
		<a href="#">German Office</a>	
		<a href="#">Houston Office</a>	
		<a href="#">Huntsville Office</a>	

[Export](#) [Cancel](#)

Now

### Portfolio by Tenure

[Add To Bookmark](#) [Export](#) [Cancel](#)

Date : 10/04/2010 11:00 AM

### Portfolio by Tenure

Tenure	Name
<a href="#">Leased</a>	<a href="#">WAS02-1500 Massachussets Avenue, NW</a>
	<a href="#">HOU01 - 2500 City West Blvd</a>
	<a href="#">WIN01-889 Erin Street</a>
	<a href="#">WAS01-200 C Street, SW</a>
	<a href="#">ATL01 - 1421 Peachtree Street</a>
	<a href="#">PL01-5994 W. Las Positas Blvd</a>
	<a href="#">NY01-1339 E. 42nd Street</a>

[Export](#) [Cancel](#)

You cannot view the data behind a Metric Query using this method.

## 6. Web Graphics

This chapter illustrates how to find familiar graphics places. For more details about Web graphics, see the *IBM TRIRIGA Application Platform 3 Graphics User Guide*.

### Then

To define a report to display graphics data:

Clicked **Query**, then **Visual Query**, then selected the Location record.



Clicked the Query icon , then clicked **New**.

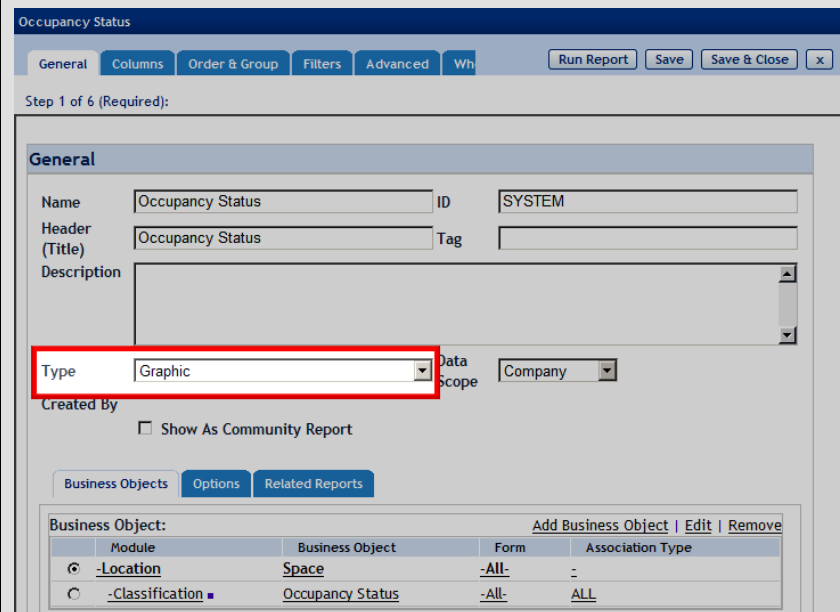
When the Query Type definition was complete, the system added the query to the list.

### Now

To define a report to display graphics data:

Select **My Reports**, click **New**.

Define the report (see details in the *IBM TRIRIGA Application Platform 3 Graphics User Guide*). The report Type must be **Graphic**.

The screenshot shows the 'Occupancy Status' report definition form. The 'General' tab is active, showing fields for Name, Header (Title), Description, Type, and Data Scope. The 'Type' dropdown is set to 'Graphic' and is highlighted with a red box. Below the form is a table of business objects.

Business Object:				Add Business Object   Edit   Remove	
Module	Business Object	Form	Association Type		
-Location	Space	-All-	:		
-Classification	Occupancy Status	-All-	ALL		

When the report definition is complete, the report appears in the Menu drop-down in the Graphics section.

## Then

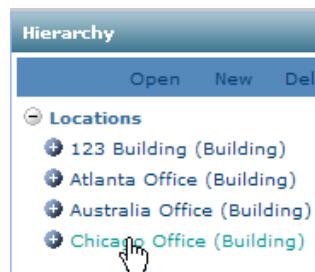
To see the graphic image of a record from the Location hierarchy:

Clicked **Portfolio**, or the arrow next to Portfolio.

Clicked **Location Manager**.

Clicked **Location**.

In the Hierarchy section, selected the Location record.



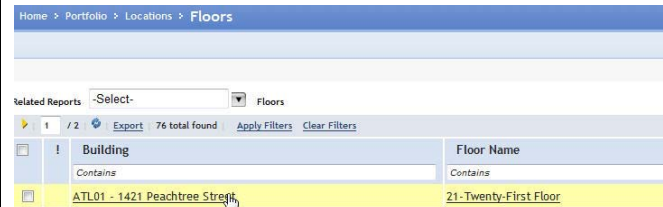
In the List View, selected **Special View**.

The system displayed the location's graphic.

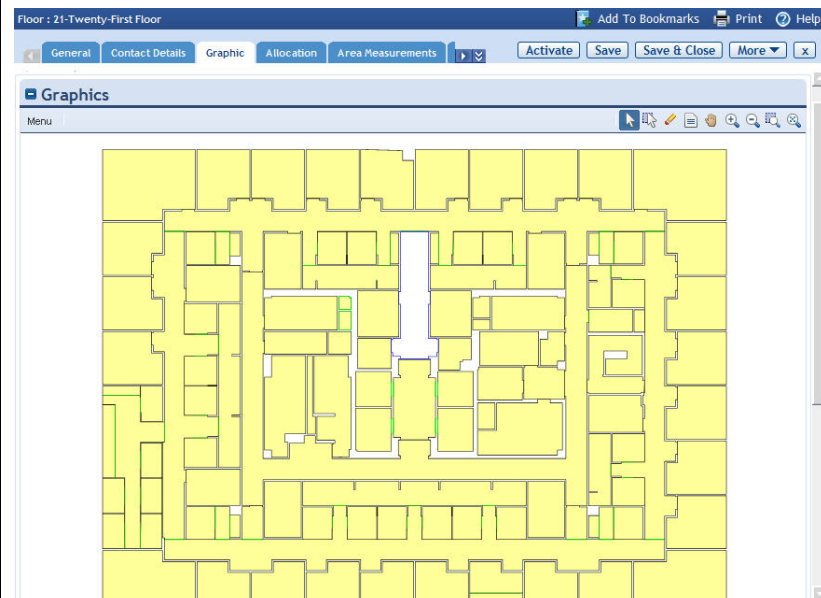
## Now

To see the graphic image of a record from the Location hierarchy:

Select the record from My Bookmarks (or find and open the record in the Location hierarchy).



Select the **Graphic** tab (or in the General tab, scroll to the Location Graphic section).



## Then

To manage CAD Labels:

Clicked **Setup**, or the arrow next to **Setup**.

Clicked **CAD Label Manager**.

The CAD Label Manager opened.

CAD label records looked like the following screenshot:

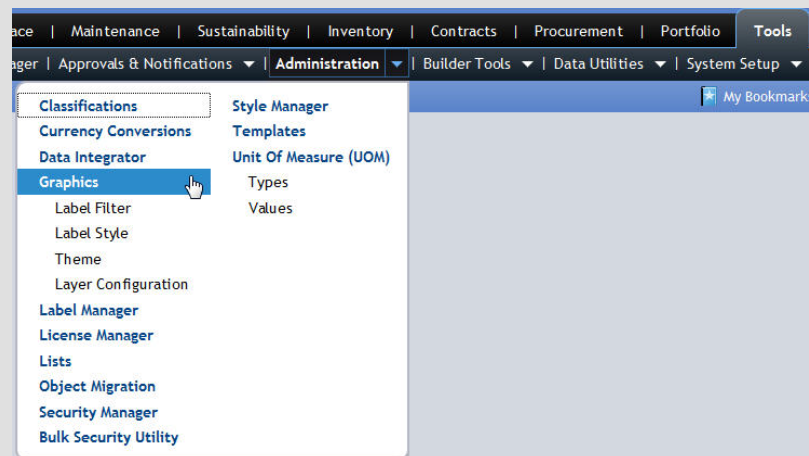
The screenshot shows the CAD Label Manager interface. At the top, there are buttons for 'Apply', 'OK', and 'Cancel'. Below this is a 'Description' section with several fields: 'Name' (Spaces), 'Module' (Location), 'Business Object' (triSpace), 'Created By', 'Default Font' (Standard), 'Default Height' (12.0), and 'Default Color' (black). There is a checkbox for 'Default Label Style' which is checked. Below the form is a table with columns: 'Module', 'Business Object', 'Field', 'Prefix', 'Suffix', 'Font', 'Height', and 'Color'. The table contains three rows of data.

	Module	Business Object	Field	Prefix	Suffix	Font	Height	Color
↑	Location	triSpace	RecordInformation\Name			Standard	12.0	Black
↓	Classification	triSpaceClassCurrent	RecordInformation\Name			Standard	12.0	Black
	triPeople	triPeople	Detail\Name			Standard	12.0	Black

## Now

To manage label filters, label styles, themes, and layers:

Select the **Tools** from the first level of the menu bar, select the arrow next to **Administration**, and select **Graphics** from the third level menu.



These tools apply system-wide. The *IBM TRIRIGA Application Platform 3 Graphics User Guide* details how to use each tool.

The following screenshot shows an example of a layer configuration:

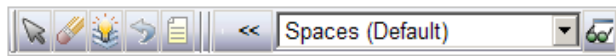
The screenshot shows the 'Graphic Layer Config' dialog box. The title bar is 'Graphic Layer Config : 1000006'. The 'General' tab is selected. The 'General' section shows 'ID 1000006' and 'Status Active'. The 'Description' is 'Turn Off Architecture by Default'. The 'Criteria' section shows 'By Layer Name' selected, 'Set Layer State To Off', and 'Where Layer Name Contains' with 'Value A'.

## Then

Manipulated the graphic displayed with toolbars on the Graphics Editor

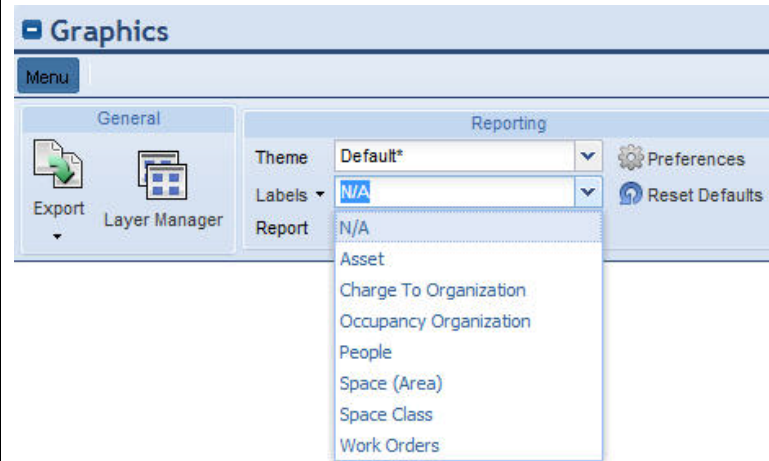


and on Visual Query



## Now

You can manipulate the graphic displayed with a toolbar or a menu of options.



These features are described in the *IBM TRIRIGA Application Platform 3 Graphics User Guide*.



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