IBM TRIRIGA
Version 10.3

Application Administration
User Guide

Note
Before using this information and the product it supports, read the information in "Notices" on page 104.

Second edition, February 2013.

This edition applies to version 10, release 3, modification 0 of IBM® TRIRIGA® and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

About This Guide

This guide describes the tools for administering the IBM® TRIRIGA® applications. This guide also contains descriptions of the various tabs and their functions.

Conventions

This document uses the following conventions to ensure that it is as easy to read and understand as possible:

Note – A Note provides important information that you should know in addition to the standard details. Often, notes are used to make you aware of the results of actions.

Tip - A Tip adds insightful information that may help you use the system better.

Attention - An Attention notice indicates the possibility of damage to a program, device, system, or data.

Intended Audience

This guide is for Application Administrators and other users who are responsible for maintaining the IBM TRIRIGA applications.

Prerequisites

This guide assumes the reader has a basic understanding of Web-based applications and has administrator access to the IBM TRIRIGA software.

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.

1. Application Settings

Many of the parameters used in various calculations and comparisons can be set once for the entire application. The Application Settings record provides a location for setting the defaults for such parameters.

The parameters included in the Applications Settings record are as follows:

- Environmental Settings
- Opportunity Analysis Parameters
- Reporting Base Period Settings
- Facility Assessment Analysis Defaults
- Lease Abstract Defaults
- Lease Abstract Transformation
- Offline Form
- Date Generation Settings
- Lease Accounting Settings
- Service Management Settings
- Move Planning Settings
- Space Management Settings
- Real Estate Management Settings
- Reservation Settings
- Planning Settings
- Integration Settings

Note – Appropriate IBM TRIRIGA software licensing is required to take advantage of the features supported by Application Settings.

Application Settings Access

To access Application Settings, navigate to Tools > System Setup > General > Application Settings. The system opens the Application Settings form.

General Tab

The following information describes the General tab:

Application Settings Form, General Tab

The General tab includes environmental settings, opportunity analysis parameters, reporting base period settings, facility assessment analysis defaults, lease abstract defaults, lease abstract transformation, Offline form, and date generation settings.

In the General section, click the Source System Config hyperlink to change the source system and its offline email address.

The Environmental Settings section contains the units of measure (UOM) for Energy, Travel, Emission, Water, Waste, and Carbon reporting; Carbon Credit; Energy, Travel, and Waste Carbon Calculation. Also N20 GWP and CH4 GWP Conversion values. These parameters are used while calculating IBM TRIRIGA Real Estate Environmental Sustainability reports and analysis.

Since log data for the same environmental factor is likely to be in different UOM across your My Company, Building, Land, Retail Location, and Structure records, use values here to set standard UOM for reporting. Then, records and reports show consistent normalized values. This normalized data shows in forms and reports with (Reporting UOM) in the field name. For more information, see the *IBM TRIRIGA 10 Portfolio Management User Guide*.

The Opportunity Analysis Parameters section contains the Analysis Term, Discount Rate, Capitalization Rate, Blended Energy Cost, and Blended Energy Emission Conversion Factor used during Facility Analysis. A Facility Analysis allows you to compare Opportunities and Funding Requests. For more information, see the *IBM TRIRIGA 10 Facility Assessment User Guide*.

The Reporting Base Period Settings section identifies the Reporting Base Year and Reporting Base Month.

The Facility Assessment Analysis Defaults section contains the default values used in Facility Assessment Analysis. For more information, see the *IBM TRIRIGA 10 Facility Assessment User Guide*.

The Lease Abstract Defaults section contains the values for Default Parent for Internal Organization, Default Parent for External Organization, and Default Parent for Location used during the Real Estate Lease Abstract process. For more information, search for *lease defaults* in the IBM TRIRIGA 10 Information Center.

The Lease Abstract Transformation section establishes the transformations used in the OSCRE Lease Abstract process for LA Accept Transformation, LA Reject Transformation, LA Send Transformation, LA Request Clarification Transformation, and LA Provide Clarification Transformation. The records must be present in the Transformation Content object, which can be found in Tools > System Setup > Integration. For more information, search for *OSCRE tools* in the IBM TRIRIGA 10 Information Center.

The Offline Form section identifies the Offline form to be used for forecast surveys. For more information, see the *IBM TRIRIGA 10 Strategic Facility Planning User Guide*.

Application Settings Form, General Tab

The Date Generation Settings section identifies the Date Generation start date and buffer period.

The Support Resources section identifies the URL that links to the IBM TRIRIGA support page. The section also includes an action to update all Help records with this URL.

The Project Security section identifies whether you can access project records with security groups before the project is activated. If the `USE_PROJECT_SECURITY` property in the `TRIRIGAWEB.properties` file is enabled, and the Enable in Draft Mode check box is selected in the Project Security section, you can access the security of the project record in Draft status. Information on the `USE_PROJECT_SECURITY` property can be found in the *IBM TRIRIGA Application Platform 3 Installation and Implementation Guide*.

Lease Accounting Settings Tab

The Lease Accounting Settings tab provides settings to set up default values for review assumptions, lease growth assumption, rent component assumption, and amortization. For more information, search for *lease defaults* in the IBM TRIRIGA 10 Information Center.

Service Management Settings Tab

The Service Management Settings tab provides settings to set up the Service Management Setup Wizard for the IBM TRIRIGA system. For more information about Service Management, see the *IBM TRIRIGA 10 Maintenance and Service Management User Guide*.

Move Planning Settings Tab

The Move Planning Settings tab provides move policy settings and move cost estimates for the IBM TRIRIGA system. For more information, see the *IBM TRIRIGA 10 Space and Move Management User Guide*.

Space Management Settings Tab

The Space Management Settings tab provides space occupancy settings for the IBM TRIRIGA system. For more information, see the *IBM TRIRIGA 10 Strategic Facility Management User Guide*.

Real Estate Management Settings Tab

The Real Estate Management Settings tab provides settings for the inclusion of evaluation and scoring in CTQ entries and for requiring task completion for submit on RE projects. For more information on Real Estate Management, see *IBM TRIRIGA 10 Real Estate Transaction Management User Guide.*

Reservation Settings Tab

The Reservation Settings tab provides reservation settings for service wake-up durations, space hold times, and Microsoft Exchange integration. For more information, search for *setting up reservations* in the IBM TRIRIGA 10 Information Center.

Planning Settings Tab

The Planning Settings tab provides SPF settings and details for the IBM TRIRIGA system. For more information, see the *IBM TRIRIGA 10 Strategic Facility Management User Guide*.

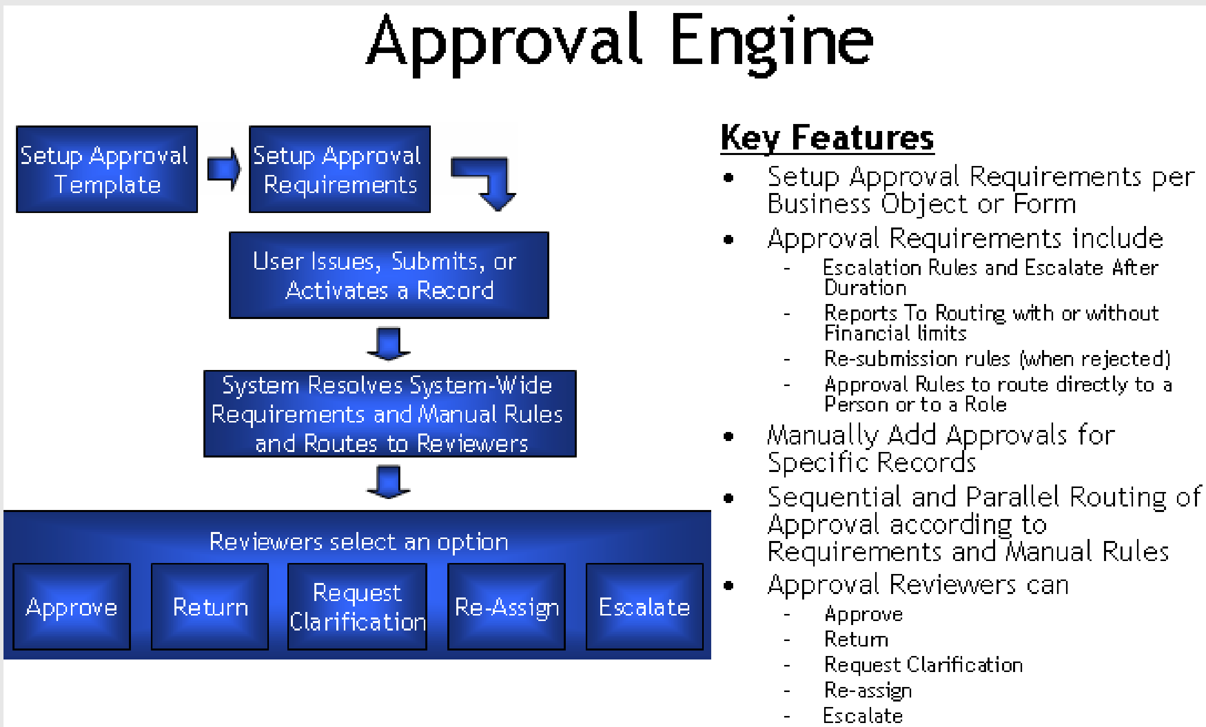
Integration Settings Tab

The Integration Settings tab provides SAP settings and energy rating settings for the IBM TRIRIGA system. For more information about Service Management, see the *IBM TRIRIGA 10 Maintenance and Service Management User Guide* and the *IBM TRIRIGA 10 Connector User Guide*.

2. Approvals

Many companies require certain actions to follow a set of business rules before the action can be taken. For example, most companies have approval business rules around issuing a purchase order. You can set up approval business rules within the IBM TRIRIGA software. Use an Approval Template and Approval Requirement to attach approvals to a business object or a form. As a starting point, IBM TRIRIGA provides default approval templates and approval requirements. These can be updated to meet your business needs by using the approval template and approval requirement function.

The following chart depicts the data flow through the approval process.



The Approval Process

The following sections describe how to use the approval template and the approval requirement functionalities.

Approval Template

The first step is to set up approval templates. An approval template can be applied to a specific type of record, to a specific business object, or to multiple business objects.

Before you set up approval templates, you should evaluate the business objects and forms in your IBM TRIRIGA system and determine which require approvals when they are issued, activated, or submitted. When you have decided which require approvals, evaluate the business rules to see if there are common requirements. For instance, for meeting minutes, daily journals, and project review checklists, your organization may require the Project Manager of the project in which the record was created to approve these records when they are issued. In this case, an approval template can be shared for their approval requirements.

To Access the Approval Template Function

Follow the steps below to access the Approval Template function:

To Access the Approval Template function

Step 1 Navigate to Tools > Approvals & Notifications > Approval Templates.

The system opens the list of Approval Templates.

Step 2 From this window you can add, modify, or delete a template.

To Add an Approval Template

Follow the steps below to add an Approval Template:

To Add an Approval Template

Step 1 Click **Add**.

The system opens an Approval Template form.

Step 2 In the General section of the General tab, specify the Name of the approval template.

The system provides the Status after the record is created.

To Add an Approval Template

The Approval Options section defines many of the approval rules for the new template.

The value you select for Escalation Rule determines whether or not an approval using this template will be escalated, and if so, how. Escalation occurs if an approval waits too long in an approver's action item list.

Step 3 Select the appropriate action from the **Escalation Rule** list:

"Escalate to Next Approver for All Approvers but Last Approver", after the escalation duration, bypasses the current approver and moves the approval to the next approver on the current list. If the current approver is the last approver on the list, the system escalates the approval to the Reports To of the current approver as indicated on their Employee record.

"Escalate to Reports to of Current Approver", after the escalation duration, bypasses the current approver and moves the approval to the Reports To of the current approver as indicated on their Employee record.

"No Escalation" means an approval waits for the current approver and is not escalated.

To indicate in Escalate After how long an approval is to wait before bypassing the current approver and being escalated per the escalation rule.

Step 4 Click the calendar icon and complete. Then click **OK**.

Note – If the Escalate After value is 0, no escalation will occur regardless of the value selected for Escalation Rule.

In Route to Reports To of Submitter, "Reports To" refers to the person to whom the approver reports (i.e., their supervisor). This is indicated on the approver's Employee record.

Step 5 Select the appropriate approval rule routing from the **Route to Reports To of Submitter** list.

If either Route to Reports To of Submitter value is selected, routing could be done based on cost and the Reports To Cost Routing field becomes a required field.

If the Reports To routing is after role-based routing, the supervisor gets the approval after all of the reviewers for the approval rules described below are completed. If the Reports To routing is before role-based routing, the supervisor gets the approval before any of the reviewers for the approval rules described below receive the approval.

To Add an Approval Template

Step 6 Select the appropriate action from the **Reports To Cost Routing** list.

If you select "Route directly to first Reports To person who can approve the cost", the system skips the submitter's immediate supervisor if they do not have the required financial limit to approve the record and proceeds up the management hierarchy directly to the level of management that has the appropriate financial limit to approve the record.

Use the When No Reports To Route To field to indicate where the approval should be routed if no Reports To person can be found or if no Reports To person can be found with the required financial approval threshold.

Note – Make this field's value an administration group with rights to assign a Reports To.

Step 7 Use the Review On Return field to indicate what is to happen to the approval if has been returned and then resubmitted for approval. Select the appropriate action from the **Review On Return** list.

The "All reviewers re-review" action routes the approval back through all approvers.

The "Only re-reviewed by who returned and subsequent reviewers" action routes the approval to the reviewer who returned it. Once approved by that approver, the approval routing resumes with the next reviewer.

The Approval Rule section is where approval rules for role-based routing are defined. The system displays any approval rules that already exist.

Approval rules may be added, modified, or deleted.

Step 8 To add an approval rule to the approval template, click **Add** on the Approval Rule action bar.

The system opens an Approval Rule form. The system supplies the information in the General section.

Complete the information in the Details section.

Step 9 Specify the Sequence number of this approval rule.

The system applies approval rules in sequential order. If two rules have the same sequence number, they are routed in parallel.

To Add an Approval Template

Step 10 Select the appropriate review type from the **Review Type** list.

Use "For Comment" if you expect the recipient to make a comment within the review process, but the recipient is not required to approve or return the record (for example, before an approval goes to anyone else).

"Optional Review" does not require the reviewer to take any action but informs them that the approval is being routed. The reviewer has the option to take an action while the record is being reviewed by other reviewers.

Anyone who must approve or return the record must be set up as a "Required Review".

Step 11 Select the radio button to indicate whether the Rule Type is a `Person` or a `Role`.

If you selected `Person` for Rule Type, you must specify which person. This approval always goes to that person.

Step 12 If you selected `Role` for the Rule Type, you must specify which role. To do so click the Search icon next to Role and select the role.

Step 13 Select the appropriate source from the **Use Roles From** list:

"Linked Record" refers to information in the record to which this approval is linked.

"Linked Record's Associated Geography" is the Geography listed in the record's System Geography field on the System tab.

"Linked Record's Associated Location" is the location listed in the record's System Location field on the System tab.

"Linked Record's Associated Organization" is the Organization listed in the record's System Organization field on the System tab.

"Linked Record's Associated Project" is the project listed in the record's Project field on the System tab. This is the project in which the record was created. This is only applicable if you are using IBM TRIRIGA 10 Projects function.

"Submitter's Associated" selections refer to information associated with the current user. The Submitter's Geography, Location, and Organization are listed on the System tab of the record that identifies the submitter in the system.

Note – Be sure to select roles and role sources that are appropriate for your company's business rules for this business object or form. See the Contact Roles chapter for more information. If the approval is required for your business process, you should ensure that the role is also required. If the system cannot find a person acting in that role, it automatically approves the record.

To Add an Approval Template

Any data specified in the Approval Thresholds section is used by the system only if the record is for items with cost and to which cost has been applied.

If the record has an approval amount, it is sent to the person or role in the Details section if it is within the cost range specified in the Approval Thresholds section.

Step 14 Specify the lowest cost in the Approve More Than field and the highest cost in the Approve Less Than field.

Step 15 If the correct currency does not show, select the correct currency from the list.

Step 16 Click **Create**.

The approval rule is added to the approval template.

Step 17 To delete an approval rule from an approval template, select the check box beside the rule, then click **Remove** on the section bar.

Step 18 To modify an approval rule from an approval template, click the linked record icon beside the rule. Change the values as needed and click **Save & Close**.

You can create approval rules by clicking the **Find Roles** action. This creates an approval rule for each role you select from the pop-up window with a Rule Type of "Role", a Review Type of "Required Review", and Use Roles From of "Linked Record".

You can create approval rules by clicking the **Find People** action. This creates an approval rule for each person you select from the pop-up window with a Rule Type of "Person" and a Review Type of "Required Review".

Step 19 When you are finished defining the new approval template, click **Create Template**.

Step 20 Click **Save & Close**.

To Modify an Approval Template

Follow the steps below to modify an Approval Template:

To Modify a Approval Template

Step 1 Select the hyperlinked name of the Approval Template you want to modify.

Step 2 Make the changes and click **Activate**.

To Delete an Approval Template

Follow the steps below to delete an Approval Template.

To Delete an Approval Template

Step 1 Click the check box beside the Approval Template that you want to delete.

Step 2 Click **Delete**.

Approval Requirement

This step connects an approval template to a business object or form. The system uses any *Approval Requirement* in active status. If a business object or form has more than one requirement, the system merges the requirements. If a business object or form has inconsistent requirements, the system uses the most restrictive of the requirements. See Approval Tips for the order of precedence for requirements.

To Access the Approval Requirement Function

Follow the steps below to access the Approval Requirement function:

To Access the Approval Requirement function

Step 1 Navigate to Tools > Approvals & Notifications > Approval Requirements.

The system displays the list of Approval Requirements.

Step 2 From this window you can add, modify, or delete a requirement.

To Add an Approval Requirement

Follow the steps below to add an Approval Requirement:

To Add an Approval Requirement

Step 1 Click **Add**.

The system opens an Approval Requirement form.

Step 2 In the General section of the General tab, specify the Name of the Approval Requirement.

The system supplies an ID if you do not.

To Add an Approval Requirement

Step 3 In the Details section, specify the business object that requires approval and the approval template to be used.

Step 4 Select the business object to which this approval requirement is to be inked from the **Linked Business Object** list.

> **Note** – This must match the business object label, which typically is displayed on the System tab of the record.

Step 5 If there is a Linked Form, select it from the **Linked Form** list.

> **Note** – This must match the form label, which typically is displayed on the System tab of the record.

In the Details section, if you select only a Linked Business Object and no Linked Form, all records that are created from the business object will use this approval requirement.

If you select both a Linked Business Object and a Linked Form, only those records that are created from the business object AND the form will use this approval requirement.

Step 6 Specify the Approval Template by typing a few characters to take advantage of autocomplete or by clicking the Search icon and selecting from the list.

Step 7 Click **Create Draft**.

Step 8 Select the appropriate action.

Activate makes the approval requirement available for use in the system.

To Modify an Approval Requirement

Follow the steps below to modify an Approval Requirement:

To Modify an Approval Requirement

Step 1 Select the hyperlinked name of the Approval Requirement you want to modify.

Step 2 Click **Revise**.

Step 3 Make the changes and select the appropriate action.

Activate makes the approval requirement available for use in the system.

To Delete an Approval Requirement

Follow the steps below to delete an Approval Requirement.

To Delete an Approval Requirement

Step 1 Click the check box beside the Approval Requirement that you want to delete.

Step 2 Click **Delete**.

> **Note** – If the Approval Requirement record has ever been activated, the record is retired, not deleted.

Advanced Approval Options from the Notifications Tab of Records

Business objects that have approval functionality also have a Notifications tab with a Manual Approvers section. The following steps provide an example of how to add manual approvers to a record. The same steps can be used for other records that include a Notifications tab with Manual Approvers section.

To Add Manual Approvers to a Record

Step 1 Navigate to the record. The following steps use the Purchase Order business object for purposes of illustrating the technique, so the navigation is Procurement > Requisitions & Purchase Orders > Purchase Orders. Click **Add** to open a new Purchase Order.

The system opens a Purchase Order form.

Step 2 In the General section of the General tab, specify the Name of the purchase order. Modify the Date if appropriate. Specify a Description of the purchase order.

Step 3 In the other sections, specify data as appropriate for the purchase order. Be sure to complete any required fields.

Step 4 Select the Notifications tab.

Step 5 In the Manual Approvers (In Addition to Approval Requirements) section, click **Add Person**.

Step 6 Select the check boxes next to the manual approvers.

Step 7 Click **OK**.

Step 8 Click **Create Draft**.

To Add Manual Approvers to a Record	
Step 9	Click **Save & Close** or **Issue**.

To see the requirements for this purchase order:

To See Requirements for Purchase Order	
Step 1	Click the hyperlinked Name to open the record.
Step 2	Select the Notifications tab.
Step 3	Click the hyperlinked record to open it.
Step 4	Select the Advanced tab. You can see what the approval requirements have been resolved to for this record. You can add manual approvers from here and can change approval options.
Step 5	Click **Save & Close**.

Approval Tips

Tip
Each time an event occurs that triggers an approval, an action item appears in each reviewer's home page. Optional and required reviewers can approve, return, request clarification, reassign, or escalate. For comment, reviewers can comment on the approval.
If you are using role-based approvals, make sure roles are required for that business object; otherwise the approvals will be bypassed.
If a user is going on vacation and wants to delegate approvals while they are gone, they can do so from their My Profile. Once there, select My Notifications tab, and in the Approval Preferences section specify the person in Delegate To.
Each time an approval is issued for a record, the system checks the approval requirements and resolves any conflicts or inconsistencies by taking the most restrictive requirements for approval routing. You can see what the requirements have been resolved to for a record by opening the approval from the Notifications tab, navigating to the Advanced tab, and reviewing the Resolved Actions section. You also can add manual approvers from there and can change approval options. The order of precedence for these requirements is listed in the following table, with the strictest at the top for each option. Remember, this is for combining both approval requirements and the settings set manually on the Advanced tab of the approval records.

Tip

Approval Option	Rule
Escalation Rule	Order of precedence for Escalation Rule (the system sets based on the first of the following it finds to be true): 1) If the approval record's Escalation After is resolved to zero, set Approval record Resolved Escalation Rule to “No Escalation” 2) If any template's Escalation Rule or the manual setting of the approval record’s Escalation Rule is set to Escalate to Reports to of “Current Approver”, set approval record Resolved Escalation Rule to “Escalate to Reports to of Current Approver” 3) If any template's Escalation Rule or the manual setting of the approval record’s Escalation Rule is set to "Escalate to Next Approver for All Approvers but Last Approver", set approval record Resolved Escalation Rule to "Escalate to Next Approver for All Approvers but Last Approver" 4) If all template's Escalation Rules and the manual setting of the approval record’s Escalation Rule are set to "Do not escalate", set approval record Resolved Escalation Rule to "Do not escalate"
Escalate After	Set approval record’s Resolved Escalation After to the minimum Escalation After of all templates and manual setting of the approval record’s Escalation After if greater than zero.
Route to Reports To of Submitter	Order of precedence for Route to Reports To of Submitter (the system sets based on the first of the following it finds to be true): 1) If any template's Route to Reports To of Submitter or the manual setting of the approval record’s Route to Reports To of Submitter is set to "Route to Reports To before Role-based routing", set approval record Resolved Route to Reports To of Submitter to "Route to Reports To before Role-based routing" 2) If any template or the manual setting of the approval record is set to "Route to Reports To after Role-based routing", set the approval record Resolved Route to Reports To of Submitter to "Route to Reports To after Role-based routing" 3) If all templates and the manual setting of the approval record are "Do not route to Reports To", set the approval record Resolved Route to Reports To of Submitter to "Do not route to Reports To"

Tip

You can accept and access action items directly from your Action Items portal section.

If you open an action item and do not see any actions for the record, this indicates that you need to accept the action item to proceed. Close the record and follow the instructions below to continue.

An action item with a status of Assigned means that you are one of several users that the approval rules established for that record required the system to send an approval request. If you decide to accept the request for action on the record, select the check box next to the item and click the **Accept** action on the Action Items section bar. This updates the status of the action item from Assigned to Accepted and removes the item from all other user's Action Items portal sections until you complete the action requested. Depending on the process defined for the action item, the record may or may not return to the other user's Action Items portal sections when you complete the action requested.

An action item with a status of Accepted is waiting for you to act upon it. To begin, select the hyperlinked action item name.

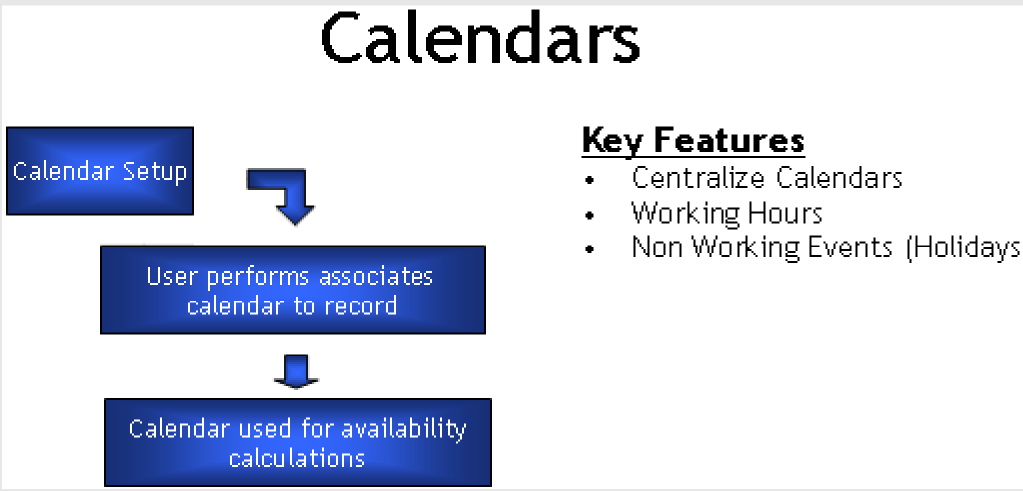
Before an approval is re-routed, the system performs the following:

- Removes incomplete reviews from any prior approval routing so they can be re-resolved.
- Inserts Reviewer records for completed reviewers from previous routings into the Reviewer list based on rules.
- Merges and resolves approval template rules by role or person.
- For each rule,
    - When the reviewer is a person, inserts Reviewer records into the Reviewer list, if the person is not already listed as a Reviewer for the same sequence.
    - If a person is not found for a role, does not insert a Reviewer record.
    - For each manual reviewer identified as a person and any people found when resolving the manual reviewers by role, inserts Reviewer records into the Reviewer list, if the person is not already listed as a Reviewer for the same sequence.
    - Inserts new Reviewer records for Reports To reviewers into the Reviewer list based on rules identified above.
    - Routes an error to the group identified in the approval if it does not find a Reports To person. Stops the process until resolved.
    - Automatically approves a Reviewer that is not an Active IBM TRIRIGA User. (This is based on the assumption that the approval happens outside of the system.)
    - Automatically completes the review if the first Reviewer is the Submitter, and sets the status to Submitted.

3. Calendars

The *Calendar* function provides a central place to set up and manage the calendars used by the system. Calendars are used by the Gantt and the availability functionality and define the working hours and non-working events for any given resource. You can specify time zones and which calendar to use for any resource. Calendars are cumulative; if you select more than one calendar for a resource, the result will be a superset of all selected. IBM TRIRIGA ships one default calendar. Use the Calendar function to set up a calendar, or customize the default one, and associate with a given resource record.

The following chart depicts the features and flow within the Calendar process:



The Calendar Process

Note – If you have an exception, for example a specific person that has a unique schedule, you need to set up a specific calendar and associate that calendar with that person. Associate the calendar for the person in the Calendar Details tab.

A calendar may be associated with any system object, so that events, activities, repairs, maintenance, temporary usage, and downtime may be coordinated throughout the system. People, organizations, locations, assets, and other elements all may be scheduled, and the impact of scheduling related objects can be monitored. Calendars are initially added from within the Data Modeler when adding or editing a business object. The Has Calendar option must be selected for the Calendar tab to display in any business object. This gives the ability to schedule events.

The Calendar tab provides a calendar view of the planned, scheduled, and available hours of the business object record. You can view the calendar by months or weeks, and view calendar events by years, quarters, months, or weeks, by selecting one of the calendar icons listed above the calendar. The double orange arrows on each end of the section bar showing the month and year enable you to display the previous or next week, month, quarter, or year.

Planned, scheduled, and available hours are listed for each day, as well as by total for the week, month, quarter, or year you are viewing. Scheduled events display on the calendar as active links. Any event scheduled for the business object record show on the calendar day corresponding to the start date of the event. Click the link to pull up the event record.

Dates display as hyperlinked text. Click the date to view the schedule of all planned events for that specific day. The information includes the start time, end time, and description of the event. Use the double orange arrows to navigate to the complete schedule for the next or previous day. Click the description to view the complete event record.

Calendar Function

To Access the Calendar Function

Follow the steps below to access the Calendar function:

To Access the Calendar Function

Step 1 Navigate to Tools > System Setup > General > Calendars.

The system displays the list of Calendar records.

Step 2 From this window you can add, modify, or delete a calendar.

To Add a Calendar

Follow the steps below to add a calendar:

To Add a Calendar

Step 1 Click **Add**. Select **Calendar** or **Reservation Calendar**.

The system opens a Calendar form.

Note – Reservation calendars are used to determine the reservable time for one or more spaces. For more information, search for *reservation calendars* in the IBM TRIRIGA 10 Information Center.

Step 2 In the General section of the General tab, specify a unique Name for the calendar.

The system supplies an ID if you do not.

Step 3 In the Scheduling Assumptions section, specify the number of Working Hours Per Day, Working Hours Per Week, and Working Hours Per Month.

The Working Hours section contains a list of work days and times.

Step 4 To add an entry, click **Quick Add**.

Step 5 Click the linked record icon.

The system opens a Working Hours form.

To Add a Calendar

Step 6 Select the day of the week from the **Day** list.

Step 7 Adjust the *Start Time* and *End Time* as appropriate.

> **Note** – The format of Start Time and End Time must be h:mm AM or h:mm PM. If there is a leading zero or if 24-hour time is used, the system will not recognize the Working Hours.

Step 8 Click **Save & Close**.

Continue to click **Quick Add** and specify data until all of the days and hours are defined.

Use the Non-Working Events section to list days that employees on this calendar will not be working.

Step 9 To add an entry, click **Quick Add**.

Step 10 Click the linked record icon.

The system opens a Non Working Events form.

Step 11 Specify the Date or click the Calendar icon and select the date.

Step 12 For Event, specify a descriptive name.

Step 13 Click **Save & Close**.

Continue to click **Quick Add** and specify data until all of the non-working events are defined.

Step 14 Click **Create Draft**.

Step 15 When the information is complete, click **Activate**.

To Modify a Calendar

Follow the steps below to modify a calendar:

To Modify a Calendar

Step 1 Select the hyperlinked name of the calendar you want to modify.

The system opens the calendar selected.

Step 2 Click **Revise**.

To Modify a Calendar

Step 3 When you have made your changes, click **Activate**.

To Delete a Calendar

Follow the steps below to delete a calendar.

To Delete a Calendar

Step 1 Click the check box beside the Calendar that you want to delete.

Step 2 Click **Delete**.

Note – If the Calendar record has ever been activated, the record is retired, not deleted.

Calendar Sets

If a calendar can be thought of as a logical grouping of events, a calendar set can be thought of as a logical grouping of calendars.

Each calendar includes an *Availability Type* that determines the treatment of events in that calendar. An *Availability Type* of “Available” defines the working-hour events, while an *Availability Type* of “Busy” defines the meeting events. Furthermore, the availability of a resource can be defined in a number of different flavors, such as working hours, holidays, off-line maintenance events, and so on.

For example, to block out non-working hours, the system derives the non-working hours from a working-hours calendar that has an *Availability Type* of “Available”. Next, when the system renders a calendar set containing an “Available” calendar, the system is inverting those periods so that non-working hours are displayed or blocked out on the calendar. For resource-availability checks, an “Available” calendar is treated differently from a “Busy” calendar with meeting events.

By grouping “Available” and “Busy” calendars into calendar sets, a unique set of working-hour and meeting events can be defined for a particular resource.

To Access the Calendar Set Function

Follow the steps below to access the Calendar Set function:

To Access the Calendar Set Function

Step 1 Navigate to Tools > System Setup > General > Calendar Sets.

The system displays the list of calendar sets.

Step 2 From this window you can add, modify, copy, or delete a calendar set.

To Add a Calendar Set

Follow the steps below to add a calendar set:

To Add a Calendar Set

Step 1 Click **Add**. The system opens a Calendar Set form.

Step 2 Specify the *Name* and *Description*.

Step 3 To add an "Available" calendar with working-hour events, go to the Available Queries section and click **Add**. Select the *Module*, *Business Object*, and *Report*. Click **OK**.

Step 4 To add a "Busy" calendar with meeting events, go to the Busy Queries section and click **Add**. Select the *Module*, *Business Object*, and *Report*. Click **OK**.

The system already provides the *Event Start Buffer* and *Event End Buffer* display columns.

Step 5 To add more display columns, go to the Additional Display Columns section and click **Add**. Specify the *Column Label*, select the *Data Source* and *Field*, and click **OK**.

Step 6 To add tooltip columns, go to the Tooltip Columns section and click **Add**. Specify the *Column Label*, select the *Data Source* and *Field*, and click **OK**.

Step 7 Click **Save & Close**.

To Modify a Calendar Set

Follow the steps below to modify a calendar set:

To Modify a Calendar Set

Step 1 Select the check box beside the calendar set that you want to modify.

Step 2 Click **Edit**.

Step 3 Make any changes to the *Name* and *Description*.

Step 4 In the Available Queries section, select the hyperlinked name of the query that you want to modify. Make any changes and click **Save & Close**.

Step 5 In the Busy Queries section, select the hyperlinked name of the query that you want to modify. Make any changes and click **Save & Close**.

Step 6 In the System Display Columns section, select the hyperlinked name of the column that you want to modify. Make any changes and click **OK**.

To Modify a Calendar Set

Step 7 In the Additional Display Columns section, select the hyperlinked name of the column that you want to modify. Make any changes and click **OK**.

Step 8 In the Tooltip Columns section, select the hyperlinked name of the column that you want to modify. Make any changes and click **OK**.

Step 9 Click **Save & Close**.

To Copy a Calendar Set

Follow the steps below to copy a calendar set:

To Copy a Calendar Set

Step 1 Select the check box beside the calendar set that you want to copy.

Step 2 Click **Copy**.

Step 3 Specify the *Name* of the new calendar set.

Step 4 Click **OK**.

To Delete a Calendar Set

Follow the steps below to delete a calendar set:

To Delete a Calendar Set

Step 1 Select the check box beside the calendar set that you want to delete.

Step 2 Click **Delete**.

Step 3 Click **OK**.

4. Chart Templates

A *Chart Template* is a unique layout representation of a chart type. TRIRIGA provides several pre-built templates for each chart type. When a user selects a chart, the platform uses the template to render the chart. The *TRIRIGA Application Platform 3 Reporting User Guide* describes how to use chart templates when building reports.

To Access the Chart Template Function

Follow the steps below to access the Chart Template function:

To Access the Chart Template Function

Step 1 Navigate to Tools > System Setup > General > Chart Templates.

The system displays the list of chart template records.

Step 2 From this window you can add, modify, or delete a chart template.

To Add a Chart Template

Follow the steps below to add a chart template:

To Add a Chart Template

Step 1 Click **Add**.

The system opens a Chart Template form.

Step 2 In the General section, specify a unique Name for the chart template.

Step 3 Specify a Description.

Step 4 Select a chart type from the **Chart Type** list.

Step 5 Click the Upload icon and browse to select the Image file. Click **OK**.

Step 6 Click the Upload icon and browse to select the Template File. Click **OK**.

Step 7 Click **Create**.

To Modify a Chart Template

Follow the steps below to modify a chart template:

To Modify a Chart Template

Step 1 Select the hyperlinked name of the chart template you want to modify.

Step 2 Make any changes and click **Save & Close**.

To Delete a Chart Template

Follow the steps below to delete a chart template.

To Delete a Chart Template

Step 1 Select the hyperlinked name of the chart template you want to delete.

Step 2 Click **Delete**.

5. Classifications

Classifications are records presented in a hierarchical fashion. If the type of a field is classification, a record in the Classification hierarchy can be chosen as the value of the field. Use the *Classification Hierarchy* to create and manage all classifications within the system. Because classifications are represented as records, they can contain data fields used to determine the outcome of computations. A number of Classification business objects are delivered with IBM TRIRIGA applications.

Note – Root classifications are defined when creating business objects. Application Administrators may create child classifications to further classify data but should do so only with caution and being sure to follow the business rules defined during initial design.

Classification Function

To Access the Classification Hierarchy

Follow the steps below to access the Classification Hierarchy.

To Access the Classification Hierarchy

Step 1 Navigate to Tools > Administration > Classifications.

The classifications tree opens in the Hierarchy panel.

Note – The first level in the Hierarchy under the Classifications level contains the Classification business objects. You can create child records for these business objects using the Classification Hierarchy. New Classification business objects must be created through the Form Builder.

To Add a Classification

Follow the steps below to add a classification:

To Add a Classification

Step 1 In the Hierarchy panel, click the word **Classifications** at the top.

Step 2 Click **New** at the top of the Hierarchy panel.

The Hierarchy panel now shows a list of possible types of records you can create under the Classifications record.

Step 3 In the Hierarchy panel, select the classification type for which the classification is to be created.

The system opens a form for the classification type selected.

To Add a Classification

In the General tab:

Step 4 The system supplies an ID for this Classification if you do not.

The system updates the Status when the record is created.

Step 5 Specify the Name of the new classification.

Step 6 Specify a short Description.

Step 7 If you want to specify a color to represent the classification in graphics displays, click the Search icon next to Display Color and select the color.

The system supplies the Hierarchy Path when the record is created.

Note – All Classification records contain the General section. Certain Classifications include additional fields and sections.

Step 8 Select the System tab.

Step 9 If you want to specify access permission for the classification based on System Geography, click the Search icon and select from the choices presented.

You can apply additional security by limiting access to records geographically. When a geography access entry is defined, access to records is limited to those with their Geography set at that level or higher.

Step 10 To specify System Location, click the Search icon and select from the choices presented.

Step 11 If you want to specify access permission for the classification based on System Organization, click the Search icon and select from the choices presented.

You can apply additional security by limiting access to records organizationally. When organization access is defined, access to records is limited to those with their Organization set at that level or higher.

Step 12 Make sure the Record Language field is appropriate. If you need to change it, select from the choices in the drop-down list.

Step 13 Click **Create**.

The Classification is now available for use.

To Modify a Classification

Follow the steps below to modify a classification.

Attention – Modifying a classification that is used in conjunction with other data or processes can produce unwanted or unexpected results.

To Modify a Classification

Step 1 In the Hierarchy panel, scroll until you find the classification to be modified.

Step 2 Click the classification.

Step 3 Click **Open** in the Hierarchy panel.

The system opens the form for the selected record.

Step 4 Make your changes. Click **Save & Close**.

Attention – Modifying a classification that is used in conjunction with other data or processes can produce unwanted or unexpected results.

To Delete a Classification

Follow the steps below to delete a classification.

Attention – Deleting a classification that is used in conjunction with other data or processes can produce unwanted or unexpected results.

To Delete a Classification

Step 1 In the Hierarchy panel, scroll until you find the classification to be deleted.

Step 2 Click the classification.

Step 3 Click **Delete** in the Hierarchy panel.

The system requests confirmation before deleting.

Step 4 After you click **OK**, the classification no longer shows in the Hierarchy panel.

Attention – Deleting a classification that is used in conjunction with other data or processes can produce unwanted or unexpected results.

Fiscal Period

The Fiscal Period classification is a key element in metric reporting. See *Application Building for the IBM TRIRIGA Application Platform 3: Performance Framework* for more information about Workplace Performance Management. The ETL process uses fiscal periods to define the capture period for fact table records, which makes fiscal period the primary time period dimension in metric reports.

The fiscal periods in the as-delivered IBM TRIRIGA system are comprised of years, quarters, and months, and correspond to the calendar year. The following describes how to set up the fiscal periods in your IBM TRIRIGA system to match your company's accounting practices.

For purposes of illustration, assume your company's fiscal year starts October 1 and ends September 30; has fiscal quarters ending December 31, March 31, June 30, and September 30; and has the fiscal months you would expect in each fiscal quarter. The following steps show how to set up the fiscal periods for fiscal year 2036.

To Add a Fiscal Period

To Add a Fiscal Period

Step 1 Navigate to Tools > Administration > Classifications.

Step 2 Scroll the Hierarchy panel until you see Fiscal Period.

Step 3 Click **Fiscal Period**, which changes the font to bold.

Step 4 Click **New** at the top of the Hierarchy panel.

Step 5 Click **Fiscal Year**.

The system opens a Fiscal Year form.

In the General section of the General tab, the system will provide ID, Status, and Hierarchy Path once this fiscal year record is no longer in null state.

Step 6 Specify the Name of the fiscal year. Use the year the fiscal year ends for the name of the fiscal year.

To Add a Fiscal Period

Step 7 The *Sequence* is used to organize fiscal years in sequential order. Use the convention described in the note below.

> **Note** – The sequence number is used in report ordering. It can be any decimal number value that helps to sort the list of years, quarters, and months. For example:
>
> 2036 for fiscal year 2036
>
> 2036.1 for fiscal quarter 1 in fiscal year 2036. Using this scheme, the sequence number for the four fiscal quarters in a fiscal year would end .1, .2, .3, .4.
>
> 2036.11 for fiscal month 1 in fiscal quarter 1 in fiscal year 2036. Using this scheme, the sequence number for the fiscal months in a fiscal year would end .11, .12, .13, .21, .22, …, .41, .42, .43.

Step 8 Click the Calendar icon next to Start Date and select the first day in the fiscal year.

Step 9 Click the Calendar icon next to End Date and select the last day in the fiscal year.

The system checks the Current? box if this is the current fiscal year.

Step 10 Specify a short Description.

Step 11 In the Details section, if you want to specify a Color to represent this fiscal year visually, click the Search icon and select the color from either the Basic or the Advanced tab.

Step 12 Click **Create**.

The fiscal year is now in active state and shows in the Classification hierarchy.

To Add a Fiscal Quarter

Follow the steps below to add a fiscal quarter.

To Add a Fiscal Quarter

In the Hierarchy panel:

Step 1 Click the fiscal year, which changes the font to bold.

Step 2 Click **New** at the top of the Hierarchy panel.

To Add a Fiscal Quarter

Step 3 Click **Fiscal Quarter**.

The system opens a Fiscal Quarter form.

In the General section of the General tab, the system will provide ID, Status, and Hierarchy Path once this fiscal quarter record is no longer in null state.

Step 4 Specify the Name of the fiscal quarter. Use a Q followed by a number representing the sequential number of the quarter followed by the fiscal year for the name of the fiscal quarter, numbering fiscal quarters starting with Q1 for the first one and ending with Q4 for the last fiscal quarter in the fiscal year.

Step 5 Notice the Sequence has been preset to the value from the fiscal year. Update it to represent the fiscal quarter in your company's naming convention or see the note below.

Note – The sequence number is used in report ordering. It can be any decimal number value that helps to sort the list of years, quarters, and months. For example:

2036 for fiscal year 2036

2036.1 for fiscal quarter 1 in fiscal year 2036. Using this scheme, the sequence number for the four fiscal quarters in a fiscal year would end .1, .2, .3, .4.

2036.11 for fiscal month 1 in fiscal quarter 1 in fiscal year 2036. Using this scheme, the sequence number for the fiscal months in a fiscal year would end .11, .12, .13, .21, .22, …, .41, .42, .43.

Step 6 Click the Calendar icon next to Start Date and select the first day in the fiscal quarter.

Step 7 Click the Calendar icon next to End Date and select the last day in the fiscal quarter.

Step 8 The system checks the Current? box if this is the current fiscal quarter.

Step 9 Specify a short Description.

Step 10 In the Details section, the system preset the Color to the value from the fiscal year. If you want to change the color, click the Search icon and select the color from either the Basic or the Advanced tab.

Step 11 In the Class Notes section, provide any additional information about the fiscal quarter.

The system updates the Year in the Reporting section once the record is active.

To Add a Fiscal Quarter

Step 12 Click **Create**.

The fiscal quarter is now in active state and shows in the Classification hierarchy.

Step 13 Create the three remaining fiscal quarters in this fiscal year.

To Add a Fiscal Month

Follow the steps below to add a fiscal month.

To Add a Fiscal Month

In the Hierarchy panel:

Step 1 Click the fiscal quarter, which changes the font to bold.

Step 2 Click **New** at the top of the Hierarchy panel.

Step 3 Click **Fiscal Month**.

The system opens a Fiscal Month form.

In the General section of the General tab, the system will provide ID, Status, and Hierarchy Path once this fiscal Month record is no longer in null state.

Step 4 Specify the Name of the fiscal month. Use a number for the name of the fiscal month, numbering fiscal months starting with 1 for the first one and ending with 12 for the last fiscal month in the fiscal year.

Step 5 Notice the Sequence has been preset to the value from the fiscal quarter. Update to represent the fiscal month in your company's naming convention or see the note below.

Note – The sequence number is used in report ordering. It can be any decimal number value that helps to sort the list of years, Months, and months. For example:

2036 for fiscal year 2036

2036.1 for fiscal Month 1 in fiscal year 2036. Using this scheme, the sequence number for the four fiscal Months in a fiscal year would end .1, .2, .3, .4.

2036.11 for fiscal month 1 in fiscal Month 1 in fiscal year 2036. Using this scheme, the sequence number for the fiscal months in a fiscal year would end .11, .12, .13, .21, .22, …, .41, .42, .43.

To Add a Fiscal Month

Step 6 Click the Calendar icon next to Start Date and select the first day in the fiscal month.

Step 7 Click the Calendar icon next to End Date and select the last day in the fiscal month.

The system checks the Current? box if this is the current fiscal month.

Step 8 Specify a short Description.

Step 9 In the Details section, the system preset the Color to the value from the fiscal year. If you want to change the color, click the Search icon and select the color from either the Basic or the Advanced tab.

Step 10 In the Class Notes section, provide any additional information about the fiscal month.

The system updates the *Year* and *Quarter* in the Reporting section once the record is active. Or you can specify values.

Step 11 Click **Create**.

The fiscal month is now in active state and shows in the Classification hierarchy.

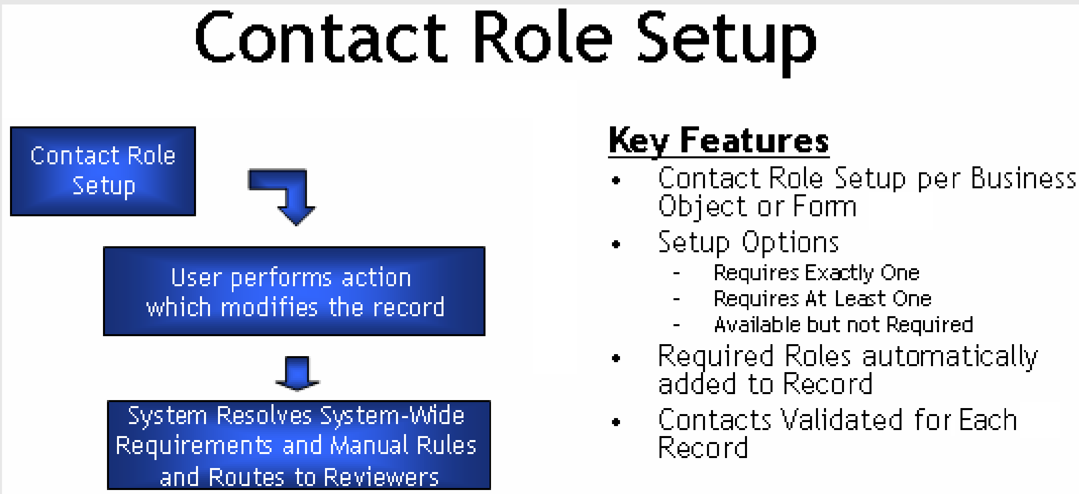
Step 12 Create the remaining fiscal months in this fiscal year.

> **Note** – Continue to number the months in the Name field, 2, 3, …, 12, and to have the Sequence end in 1 for the first month of each quarter, 2 for the second month of each quarter, and 3 for the third month.

6. Contact Roles

Use the *Contact Roles* function to define each contact that plays a particular role on a particular record based on business object or form. Contact Roles defines which roles are available in the Contact Details section of a business object. It also defines which roles are required for a business object or form when the user attempts to save a record. Contact roles are an essential part of the approval and the notification functionalities.

The following chart depicts the features and flow of information in the Contact Role setup process.



The Contact Roles Process

To Access the Contact Role Function

Follow the steps below to access the Contact Role function:

To Access the Contact Role Function

Step 1 Navigate to Tools > System Setup > General > Contact Roles.

The system displays the list of Contact Roles.

Step 2 From this window you can add, modify, or delete a contact role.

To Add a Contact Role

Follow the steps below to add a Contact Role:

To Add a Contact Role

Step 1 Click **Add**.

The system opens a Contact Role Setup form.

The information in the General section of the General tab is supplied by the system after the Contact Role is created.

The Details section is where you specify the business object and the role contacts will fulfill in this Contact Role.

Step 2 Select the Linked Business Object from the drop-down list.

Step 3 If the business object has more than one Linked Form, select the appropriate form from the drop-down list.

> **Note** – If a Linked Business Object is selected and no Linked Form, all records that are created from the business object will use this Contact Role. If both a Linked Business Object and a Linked Form are selected, only the records created from the selected business object AND the selected form will use this Contact Role.

Step 4 Click the Search icon and select the appropriate Role.

Step 5 Select the appropriate Role Requirement from the drop-down list.

"Available But Not Required" means that this role is available for this business object or form but is not required when the user attempts to save the linked business object or form's record.

"Requires At Least One" means that at least one person in this role must exist when the user attempts to save the linked business object or form's record. More than one person also may be present for this role. If there is no person in this role, an error is displayed to the user when they attempt to save.

"Requires Exactly One" means that exactly one person in this role must exist when the user attempts to save the linked business object or form's record. If more than one person exists for this role or if there is no person in this role, an error is displayed to the user when they attempt to save.

Step 6 Click **Create Draft**.

Step 7 When the information is complete and correct, click **Activate**.

To Modify a Contact Role

Follow the steps below to modify a Contact Role:

To Modify a Contact Role

Step 1 Select the hyperlinked name of the Contact Role you want to modify.

Step 2 Click **Revise**.

Step 3 Make the changes and click **Activate**.

To Delete a Contact Role

Follow the steps below to delete a Contact Role.

To Delete a Contact Role

Step 1 Click the check box beside the Contact Role that you want to delete.

Step 2 Click **Delete**.

To Add Contacts from a Record

Business objects that have contact role function also have a Contact Details section. The following steps provide an example of how to add contacts to a record. The same steps can be used for other records that include a Contact Details section.

To Add Contacts from a Record

Step 1 Navigate to the record. The following steps use the Real Estate Contract business object, Real Estate Lease form for purposes of illustrating the technique (the navigation is Contracts > Leases). In the Related Links portal section, expand RE Contracts and select Lease.

The system displays the list of real estate leases.

Step 2 Click **Add**.

The system opens a Real Estate Lease form.

To Add Contacts from a Record

Step 3 In the General section of the General tab, specify a Name and Description for the real estate lease.

Step 4 Specify a Commencement Date in the Critical Dates section.

Step 5 In the other sections, specify data as appropriate for the real estate lease. Be sure to complete any required fields.

Step 6 Click **Create Draft**.

Note the error message indicating required contacts have not been set up.

Step 7 Select the Contact Details tab.

Step 8 In the Contacts section, click the link to the missing Role.

The system displays the Contact Role form for that Role.

Step 9 On the Contact section bar of the General tab, click **Find**.

Step 10 Scroll through the choices and select the radio button next to the person to be assigned as the contact. Click **OK**.

The person you selected now shows as the contact for the role.

Step 11 Click **Save & Close**.

Step 12 In the Contacts section of the Contact Details tab of the real estate lease, click the hyperlink of the person just selected.

The system opens the Contact Role form for that person.

Step 13 Click **Find** on the Role section bar.

Step 14 Find the role for this person and click the radio button next to the role.

Step 15 Click **OK**.

Step 16 Click **Save & Close**.

You can add other people to the contacts list or use the following method as another way to set up a contact and role.

Step 17 Click **Add People**.

Step 18 Click the check box next to each person to be added, and Click **OK**.

To Add Contacts from a Record

Each person must have a Role assigned.

Step 19 Click the hyperlinked Person.

The system opens the Contact Role form for that person.

Step 20 Click **Find** on the Role section bar.

The roles shown are those established for this type of record.

Step 21 Click the radio button next to the role, and click **OK**.

Step 22 Click **Save & Close**.

Step 23 Repeat for the other contacts so all have roles.

> **Tip** – Select the Notifications tab and scroll to the Status Change Notification section. If you click **Add Status**, the statuses that have notification requirements for this business object display in the list of available statuses.

Step 24 Click **Create Draft**.

Note the error message is gone.

Contact Role Tips

Tip
If a form does not include a Contact Details section containing contact role records and the appropriate validation workflow, the Contact Role will not impact the behavior of the records created from the business object or form. Examples of forms with Contact Details sections include Geographies, Organizations, Real Estate Leases, and Capital Projects.
A contact role must be in active status to be used by the system.
A person can fulfill more than one role on a record. For example, the same person could have the role of Legal and of Contract Administrator.
Even if you have set up required approvals, if you do not have a person acting in the role required for the approval, the system bypasses all approvals. Make sure that your approval requirement aligns with the Contact Role requirements (Requires At Least One).
If you add a person to a Contact Role and that person is already part of an approval for that business object, the person only is required to participate once.

Tip
If you want an approval or a notification to go to a role, there must be a required contact for that record.
If requiring approvals, make sure you have an associated role defined.
If you want to add a person to the contacts of a record and then assign their role, you only see roles that have been set up.

7. CTQ Lists

CTQ stands for Critical to Quality. *CTQ Lists* are specific to IBM TRIRIGA Real Estate Manager Projects. In an IBM TRIRIGA Real Estate Manager Transaction Plan, a CTQ Survey can be defined that requests specific data responses. When the questions in the survey are defined, one of the data types that can be selected is List. The IBM TRIRIGA Application Platform has a specific feature that can dynamically change a field type to List but the list name must be passed to the field. Since the list name is not always user readable, the CTQ list translates the system name for the list to a user readable name for the list.

To Access the CTQ List Function

Follow the steps below to access the CTQ List function:

To Access the CTQ List Function	
Step 1	Navigate to Tools > Application Setup > Real Estate > CTQ Lists.
	The system displays the list of CTQ lists.
Step 2	From this window you can add, modify, or delete a CTQ list.

To Add a CTQ List

Follow the steps below to add a CTQ list:

To Add a CTQ List	
Step 1	Click **Add**.
	The system opens a CTQ Dynamic Lists form.
	In the General section of the General tab:
Step 2	Specify the complete List Name. This must exactly match the List Name found in the List Manager.
Step 3	Specify the List Label that users will see instead of the list name.
Step 4	Click **Create**.

To Modify a CTQ List

Follow the steps below to modify a CTQ list:

To Modify a CTQ List

Step 1 Select the hyperlinked name of the CTQ list you want to modify.

Step 2 Make the changes and click **Save & Close**.

To Delete a CTQ List

Follow the steps below to delete a CTQ list.

To Delete a CTQ List

Step 1 Click the check box beside the CTQ list that you want to delete.

Step 2 Click **Delete**.

8. Emission Conversion Factor Tables

The IBM TRIRIGA system uses the Energy Emission Factor table, Waste Emission Factor table, and Travel Emission Factor table values for calculations in the IBM TRIRIGA Real Estate Environmental Sustainability software products. These values must be correct for your installation; they impact the accuracy of calculated data. You can add information to the emission conversion factor tables with an import process, or manually. This section describes how to do so manually.

Set Up the Emission Conversion Factor Table Function

The example below uses the Energy Emission Factor table for purposes of illustration. The Waste Emission Factor table and Travel Emission Factor table work the same way.

To Access the Energy Emission Factor Function

Follow the steps below to access the Energy Emission Factor function:

To Access the Energy Emission Factor Function

Step 1 Navigate to Tools > Application Setup > Sustainability > Energy Emission Factors.

The system displays the list of energy emission factors.

Step 2 From this window you can add, modify, retire, or delete an energy emission factor.

To Add an Energy Emission Factor

Follow the steps below to add an Energy Emission Factor:

To Add an Energy Emission Factor

Step 1 Click **Add**.

The system opens an Energy Emission Factor form.

Step 2 In the General section, specify an ID for the energy emission factor. If you do not, the system supplies one.

The system updates the Status once the record is created.

Step 3 In the Description area, identify what is unique about this energy emission factor.

Tip – For future reference, cite the source of the data in this record.

To Add an Energy Emission Factor

In the Details section:

Step 4 Click the Search icon and select the appropriate Meter Type (Energy Type).

The system populates the Source based on the Meter Type.

Step 5 Click the Search icon and select the Year the record represents.

Step 6 Click the Search icon and select the Country.

Step 7 Click the Search icon and select the Carbon Calculation Region, if appropriate.

Step 8 Specify the values for the CO2 Emission Factor, N2O Emission Factor, and CH4 Emission Factor.

Step 9 Specify data in the Scope 1 section when the value of Source is `Scope 1 (Direct)`. Fields in this section for Energy Emission Factor records are Heating Value (TJ/gg) and Density.

In the Source section:

Step 10 Click the Search icon and select the Emission Data Source.

Step 11 Click the Calendar icon and select the Emission Data Source Date.

Step 12 Click **Create**.

The emission conversion factor can be used in Carbon calculations.

To Modify an Energy Emission Factor

Follow the steps below to modify an energy emission factor:

To Modify an Energy Emission Factor

Step 1 Select the hyperlinked name of the energy emission factor you want to modify.

Step 2 Make the changes and click **Save & Close**.

To Retire an Energy Emission Factor

Follow the steps below to retire an energy emission factor.

To Retire an Energy Emission Factor

Step 1 Select the energy emission factor you want to retire by clicking its hyperlinked name.

Step 2 Under **More**, click **Retire**.

Retired factor records remain in the system, providing historical data.

To Delete an Energy Emission Factor

Follow the steps below to delete an energy emission factor.

To Delete an Energy Emission Factor

Step 1 Select the check box beside the energy emission factor that you want to delete.

Step 2 Click **Delete**.

9. External Mail Server

The *External Mail Server* function is specific to IBM TRIRIGA Workplace Reservation Manager. The purpose of the External Mail Server function is to tie into an external Exchange server. The user will be able to see their Exchange calendar events without having them be part of the IBM TRIRIGA system. The External Mail Server is defined here, and then it is tied to the user's record via the External Mail Server Details section on the Calendar Details tab.

To Access the External Mail Server Function

Follow the steps below to access the External Mail Server function:

To Access the External Mail Server Function

Step 1 Navigate to Tools > System Setup > General > External Mail Server.

The system displays the list of External Mail Server records.

Step 2 From this window you can modify an external mail server.

To Modify an External Mail Server

Follow the steps below to modify an external mail server:

To Modify an External Mail Server

Step 1 Select the hyperlinked name of the external mail server you want to modify.

The system displays the selected External Mail Server record. You will want to tailor the details in the as-delivered record to match your company's environment.

Step 2 In the General tab, complete the fields in the External Mail Server Properties section as appropriate for your external mail implementation.

Step 3 Click **Save**.

Step 4 In the System tab, complete the fields in the Record Information section as appropriate for your external mail implementation.

Step 5 Click **Save & Close**.

10. Federal XML Report

The Federal Real Property Profile (FRPP) is an online system that houses the Federal real property inventory data. Agencies are required to report Federal data annually, submitting an XML file in the format in the most current "Guidance for Real Property Inventory Reporting" from the GSA Office of Governmentwide Policy. IBM TRIRIGA's *Federal XML Reporting* feature automates the process of retrieving Federal data from IBM TRIRIGA and producing the XML records needed for reporting.

Use the Location XML Report Utility form to generate a Federal XML Report. The generated XML is associated with the Location XML Report Utility record and can be saved and downloaded from IBM TRIRIGA. You submit FRPP data outside of IBM TRIRIGA.

To Access the Federal XML Report Function

Follow the steps below to access the Federal XML Report function:

To Access the Federal XML Report Function

Step 1 Navigate to Tools > Data Utilities > Location XML Report.

The system displays the list of Location XML Reports.

Step 2 From this window you can add, modify, or delete a Location XML Report.

To Process a Federal XML Report

Follow the steps below to process a Federal XML Report:

To Process a Federal XML Report

Step 1 Click **Add**.

The system opens a Location XML Report form.

Step 2 In the General section of the General tab, specify a unique ID for the Location XML Report Utility.

If you do not specify an ID, the system adds one when you click **Create** or **Process**.

Step 3 Specify a descriptive Name.

Step 4 Use the Description area to detail the purpose and scope of this Location XML Report Utility record.

To Process a Federal XML Report

Step 5 For Transformation Content, type a few characters to take advantage of autocomplete or click the Search icon and select from the list. Transformation Content is a required field.

Note – Transformation Content files are set up in Tools > System Setup > Integration.

When this Location XML Report Utility record is processed, the system puts the file containing the results in the Results field. Click the Image icon to access the file.

Use the Locations section to identify the locations to be included in the report.

Step 6 Click **Find Building**, **Find Land**, and/or **Find Structure**.

This example uses Find Building.

Step 7 Click the check boxes for the locations to be included.

Step 8 Click **OK**.

Step 9 Click **Create**.

The status changes to active.

Step 10 Click **Process**.

The status changes to processed.

Step 11 Click the hyperlinked Name.

Step 12 Click View Content or the Download icon to access the XML results.

Step 13 A sample XML result follows:


```
  <?xml version="1.0" encoding="UTF-8" ?>
- <FRPPData FY="2007">
  - <type35BuildingDetail>
      <RealPropertyType>35</RealPropertyType>
      <RealPropertyUse>10</RealPropertyUse>
    - <LegalInterest>
        <LegalInterestIndicator>L</LegalInterestIndicator>
        <LeaseMaintenanceIndicator>Yes</LeaseMaintenanceIndicator>
        <LeaseAuthorityIndicator>PC</LeaseAuthorityIndicator>
      </LegalInterest>
    - <Status>
        <StatusIndicator>A</StatusIndicator>
        <OutgrantIndicator>No</OutgrantIndicator>
      </Status>
      <HistoricalStatus>5</HistoricalStatus>
      <ReportingAgency />
      <UsingOrganization>15</UsingOrganization>
    - <Size>
        <GrossSquareFeet>23982</GrossSquareFeet>
      </Size>
      <ConditionIndex>10</ConditionIndex>
      <Value>4</Value>
      <ConditionIndex>0</ConditionIndex>
      <MissionDependency>1</MissionDependency>
      <AnnualOperatingCosts>815993</AnnualOperatingCosts>
    - <MainLocation>
        <StreetAddress>810 Vermont Avenue, NW</StreetAddress>
        <Latitude>38.900382</Latitude>
        <Longitude>-77.035099</Longitude>
      </MainLocation>
      <RealPropertyUniqueIdentifier>325-23595-235</RealPropertyUniqueI
      <City />
      <State />
```


To Delete a Federal XML Report

Follow the steps below to delete a Location XML Report.

To Delete a Federal XML Report Utility

Step 1 Click the check box beside the Location XML Report Utility that you want to delete.

Step 2 Click **Delete**.

11. Help Records

On-line help is an important part of any application. The *IBM TRIRIGA Application Platform* includes features that enable help text to be associated with each window, making it possible for you to explain the operation of the IBM TRIRIGA application to your users in your company's terminology in their language.

Help text for GUI forms that edit records is organized by module/application. For each module/application, Help is organized by the GUI form, topic, and language. Help text is managed the same if it is for a manager, a platform tool, or a GUI form.

There are two ways to configure Help for your installation. You can show either the help text defined in the Help record or the entire Help record. The default value is to show the entire Help record. Indicate your company's choice in the `FULL_HELP_OBJECT` property in the `TRIRIGAWEB.properties` file. Information on how to change this setting can be found in the *IBM TRIRIGA Application Platform 3 Installation and Implementation Guide*.

If you show the entire Help record, your users will have the ability to see related topics and related documents and the option to search help topics. IBM TRIRIGA recommends that if you use this option you set the security of typical users so that they have read-only rights to Help records and no access to the Administration section and Work Flow Instance, Associations, and Audit Actions tabs.

To Access the Help Record Function

Follow the steps below to access the Help record function:

To Access the Help Record Function

Step 1 Navigate to Tools > System Setup > System > Help.

The system displays the list of currently defined Help.

To Add a Help Record

Follow the steps below to add a Help record:

To Add a Help Record

Step 1 Click **Add**.

The system displays a Help form.

Step 2 In the Administration section of the Topic Details tab, specify the *Module / Application Name* to which this help text applies. This field must contain the name of a module defined through the Data Modeler, a key word for an application provided by the IBM TRIRIGA Application Platform, or a manager name defined in the Manager Builder.

To Add a Help Record

Step 3 Specify the *Form Name*, if any, to which this help text applies. Either specify the name of a form within the module provided in the Module / Application Name field or, if a manager name is specified in the Module / Application Name field, specify the word `Manager`.

Step 4 Click the List icon next to *Language* and select the language in which the help text, Key Words, and Topic are written.

> **Note** – You can change the values in the Language list in the List Manager.

Step 5 Specify *Key Words* that will help a user find this help text when searching with *Search Help Topics*. The text should be in the language selected.

Step 6 In the *Topic* field of the Topic Details section of the Topic Details tab, specify a short description of the Help text. This is what users will see when searching for key words using Search Help Topics. The text should be in the language selected.

Step 7 In the large text field, provide the help text for the particular GUI form, application, or manager. Depending on the configuration your company elected, this may be the only information the user sees. The text should be in the language selected.

Step 8 Use the Related Documents sub-tab to find or remove links between documents from the Document Manager to the Help topic.

Step 9 Use the Related Topics sub-tab to find or remove links between Help topics.

Step 10 Click **Create**.

Step 11 Click **Save & Close**.

To Modify a Help Record

Follow the steps below to modify a Help record:

To Modify a Help Record

Step 1 Select the check box next to the name of the Help you want to modify. Click **Edit**.

Step 2 Make changes and click **Save & Close**.

To Delete a Help Record

Follow the steps below to delete a Help record:

To Access the Help Record

Step 1 Click the check box beside the Help records that you want to delete.

Step 2 Click **Delete**.

To Search All Help Topics

Follow the steps below to search all Help topics:

To search all Help topics

Step 1 From the Topic Details section of the Topic Details tab of a Help record, click **Search Help Topics**.

The system displays a Help Search form.

Step 2 In the Search For section, type key words and click **Go** or the green arrow.

The system looks for topics that include the words input and shows the result in the Result Topics section.

Step 3 Click the radio button next to a topic. The Help text displays in the Selected Topic section on the right side.

12. Importing IBM TRIRIGA Pre-Configured External Data

Financial Summary Data

Financial summary data can be captured and brought into the IBM TRIRIGA system. This can be done by an automated integration process or by using an Excel spreadsheet. The Excel spreadsheet can be emailed using IBM TRIRIGA Connector for Offline Forms into the IBM TRIRIGA system, which is described in "Offline Content" in this user guide and in the *Application Building for the IBM TRIRIGA Application Platform 3* book, or specified directly via the Financial Summary form, as described below.

Before importing financial summary data, your company's cost code structure and fiscal periods must be defined in IBM TRIRIGA 10. Creating cost code structures is described in the *IBM TRIRIGA 10 Program and Project Management User Guide*. Establishing fiscal periods is described in "Fiscal Period" in this user guide.

A template for the Excel spreadsheet to be used to import financial summary data comes with your IBM TRIRIGA software. You will find many of the fields in the spreadsheet are locked because they contain identifying information for IBM TRIRIGA 10. When you have such a financial summary spreadsheet populated with cost codes and amounts, save it in a location that you can browse to from the IBM TRIRIGA application.

After importing financial summary data, run your company's ETL Job Item that moves the data from the Financial Summary record to the database.

Financial Summary Data

Step 1 To find the as-delivered Financial Summary Form spreadsheet, navigate to the Document Manager. Expand the TRIRIGA folder and select Cost Item.

Step 2 Specify the date the data represents in Input Date.

Step 3 Line by line after the heading, specify a Cost Code ID and Actual Amount, Budget Amount, and Forecast Amount for that cost code.

Step 4 When you finish specifying data, save the file where you can find it.

Step 5 Navigate to Tools > Data Utilities > Financial Summary DTO.

The system displays the list of Financial Summary DTOs.

Step 6 Click **Add**.

The system opens a Financial Summary DTO form.

Financial Summary Data

In the General section of the Financial Summary DTO,

The *Control Number* and *Status* are updated by the system when this Financial Summary DTO record is created.

Step 7 Specify a Name for this Financial Summary.

Step 8 Specify today's Date. Click the Calendar icon and select the date.

The date of the data in the Financial Summary is contained within the Financial Summary Form spreadsheet.

Step 9 The Content field contains the Financial Summary Form Excel spreadsheet containing the financial summary data. Click the Search icon and select the file.

Step 10 The IBM TRIRIGA system is expecting an Excel spreadsheet in `.xls`, `.xlsx`, or `.xlsm` format.

> **Note** – The Financial Summary Form Excel spreadsheet is uploaded into the Content field and can be reviewed by clicking **View Content**.

> **Note** – The **Create** action saves the Financial Summary DTO for later processing. When you are ready to process this Financial Summary DTO, find it in the Financial Summary DTO business object in the Job Manager and edit it.

Step 11 Click **Process**.

This closes the Financial Summary DTO window and begins moving the data from the Content spreadsheet to the Financial Summary DTO record.

To monitor the progress of the data movement, find the Financial Summary DTO in the Financial Summary DTO business object in the Job Manager and edit it.

As data is moved, it appears in the Line Items section.

The import is finished when the total found count appears at the top of the Line Items section. Compare this with the number of records in your Excel spreadsheet.

When finished, the data is ready to be processed by the appropriate Load Financial Summary From Offline Staging Kettle Transformation ETL Job Item. The data will not be represented in metrics until the ETL Job Item completes.

ENERGY STAR Rating Lookup Table

The ENERGY STAR Rating Lookup table must be populated so that the Opportunity Analysis process can determine the new ENERGY STAR rating based on the current ENERGY STAR rating and energy consumption reduction.

You can populate this table by obtaining the ENERGY STAR information from the US Environmental Protection Agency (EPA) and importing the information with the IBM TRIRIGA Data Integrator. The Data Integrator is described in the "Data Integrator" chapter of the *Application Building for the IBM TRIRIGA Application Platform 3: Data Management* book.

ENERGY STAR Rating Lookup Table

Step 1 Navigate to Tools > Administration > Data Integrator.

In the Data Integrator panel:

Step 2 Set Module to `triEnvironmental`.

Step 3 Set Business Object to `triEnvEnergyStarRating`.

Step 4 Set Form to `triEnvEnergyStarRating`.

Step 5 Set Import Type to Add.

Step 6 Set Action to `triCreate`.

Step 7 Set File Type to `Tab Delimited (*.txt)`.

Step 8 Set File Char Set as appropriate for your installation.

Step 9 For Name, click **Browse...** and select the IBM TRIRIGA delivered ENERGY STAR rating file from the directory where it is stored.

Step 10 Click **Upload File**.

When the import is complete, the system puts a notification in the Notifications section of your portal.

To see the imported data, navigate to Tools > Application Setup > Sustainability > ENERGY STAR Rating.

13. Lists

IBM TRIRIGA provides lists of predefined values for many fields in the user interface. These lists contain valid data and a user can select the required value from a list instead of typing it in. Data integrity is improved by restricting users to selecting approved values from a list for entry into a field. Lists ensure that information is relevant, consistent, and correctly specified. Use the *List Manager* to create and manage:

- Radio button lists
- Drop-down lists of static values
- Dynamic lists derived from values in the database
- Dependent lists (selection from one list passes a filter to another list)

The List Manager organizes lists by the module with which they are associated. For example, the Project module has lists like project type, project business object type, project transaction type, severity, and work order type. The three important types of lists are explained below:

List Type	Description
Static List	A *Static* list contains values that are fixed and do not change often (e.g., states, colors, countries).
Dependent List	*Dependent* lists consist of two static lists, one parent list and one or more child lists. For example: ▪ A business object contains two list fields named Country and State. If the State list is defined as a dependent list, the list of values available for the State field is dependent on the Country selected. When the value selected for Country is Canada, the list of values available for the State field is Canadian provinces. ▪ A Car manufacturer list, such as Ford, Chevrolet, Chrysler. A child Car Model list could have values such as Blazer, Corvette, Impala, Malibu, and Suburban. When Chevrolet is selected from the parent list, only the Chevrolet models would display in the dependent list.
Dynamic List	*Dynamic* lists are directly tied to a business object. The values pertaining to the business object comprise the list values. For example, a new model number in a business object in the Asset module. As new models are received, they are specified into the Asset business object. These model numbers are immediately available in a Model list that is used with a Parts Request form. Manual entry of the new model numbers in the Parts Request form is not necessary because the Model list was dynamically created from the Asset business object.

To Access the List Manager

Follow these steps to access the List Manager:

To Access the List Manager

Step 1 Navigate to Tools > Administration > Lists.

The List Manager page appears. The left panel has two sections: Manage By and Filter By.

Step 2 By clicking the drop-down box below Manage By, you can choose to view by `Name` or by `Type`.

Step 3 In the Manage By section, when you click the radio button beside a name, the values for that list appear in the right panel.

Step 4 To filter lists by a module, click the check box beside the module in the Filter By section.

The lists in the Manage By section refresh to show only lists available for that module.

To further refine the lists shown in the Manage By section, you may select more than one module in the Filter By section.

To Add a List

Follow the steps below to add a List:

To Add a List

Step 1 Click **New List**.

The system opens a List Type Description form.

Step 2 Specify a name for the list and select the appropriate values for the list.

Step 3 Click **OK**.

To View/Edit a List Definition

Follow these steps to view or edit a list's definition.

To View/Edit a List Definition

Step 1 Select the list you want to view.

Step 2 Click **View/Edit List**.

The system displays the List Type Description page.

All fields can be read but not all can be edited. The following fields are not editable: Name, Language, System List (if already checked as a system list, otherwise editable so that a non-system list can be set as one), Dependent List, and Source Type.

To Add a Value to a List

Follow the steps below to add a value to a list:

To Add a Value to a List

Step 1 Select the list to be updated in the Manage By section.

The system displays the current entries in the right panel.

Step 2 In the right panel, type the new list value in the Value field and press the Enter key.

Step 3 When you have finished, click **Save Entries**.

To Re-Sequence a List

Follow the steps below to re-sequence a list:

To Re-Sequence a List

Step 1 To change the sequence of one item in the list, click the up and down arrows in the Order column next to the item to be moved.

Step 2 To sort the list in alphabetical order, click **Sort List**.

Step 3 When you have finished, click **Save Sequence**.

To Label a List

Follow the steps below to label a list:

To Label a List

Step 1 Select the list to be labeled in the Manage By section.

The system displays the current entries in the right panel.

Step 2 In the right panel, click **Label List**.

Step 3 In the new window, select the language for the labels.

Step 4 For each entry, type the new label in the Label field.

Step 5 When you have finished, click **Save**.

To Delete a List Value

Follow the steps below to delete a list value:

Attention – Deleting a list value that is used in conjunction with other data or processes can produce unwanted or unexpected results.

To Delete a List Value

Step 1 Click the check boxes beside the list values that you want to delete.

Step 2 Click **Delete Entries**.

Attention – Deleting a list value that is used in conjunction with other data or processes can produce unwanted or unexpected results.

Note – When you click **Delete Entries**, the value is deleted immediately. You are not offered a delete confirmation window.

To Delete a List

Follow the steps below to delete a List:

To Delete a List

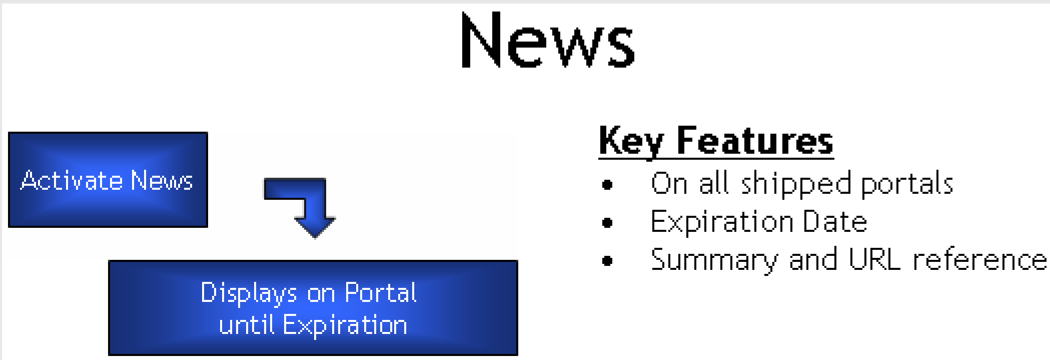
Step 1 Click the check box beside the list that you want to delete.

Step 2 Click **Delete List**.

14. News

The *News* function allows customers to broadcast information company wide. The news item shows up on every user's home portal in the Company News portal section until the news item's expiration date. Along with the headline, a news item can include rich text and a source URL.

The following chart depicts the features and flow of information in the News setup process.



The News Process

To Access the News Function

Follow the steps below to access the News function:

To Access the News Function

Step 1 Navigate to Tools > System Setup > General > News.

The system displays the list of news records.

Step 2 From this window you can add, modify, or delete a news record.

To Add a News Record

Follow the steps below to add a news record:

To Add a News Record

Step 1 Click **Add**.

The system opens a News form.

Step 2 In the General section, specify an ID for this news item. If you do not, the system supplies one when the record is activated.

To Add a News Record

Step 3 Summarize the news item in the Headline field.

Step 4 Specify the Date the news item is to first appear. Or click the Calendar icon and select a date.

Step 5 Write a Summary for the news item.

Note – Typically, News records are read-only for all users except System Administrators. All other users typically have read-only access to the General and Full Story sections of the General tab.

Step 6 If you want to broadcast an image with the news item, click the Upload Image icon.

Step 7 Browse to find the location of the image and click **Save**.

In the Details section:

Step 8 If the Language field is not correct, select the appropriate language from the drop-down list.

Step 9 Specify the Expiration Date for the news item. Or click the Calendar icon and select a date.

Step 10 In the Full Story section, provide a Source URL and/or specify text.

Step 11 Click **Activate**.

To Modify a News Record

Follow the steps below to modify a news record:

To Modify a News Record

Step 1 Select the hyperlink of the news record you want to modify.

Step 2 Click **Revise**.

Step 3 Make the changes and click **Activate**.

To Delete a News Record

Follow the steps below to delete a news record.

To Delete a News Record

Step 1 Click the check box beside the news record that you want to delete.

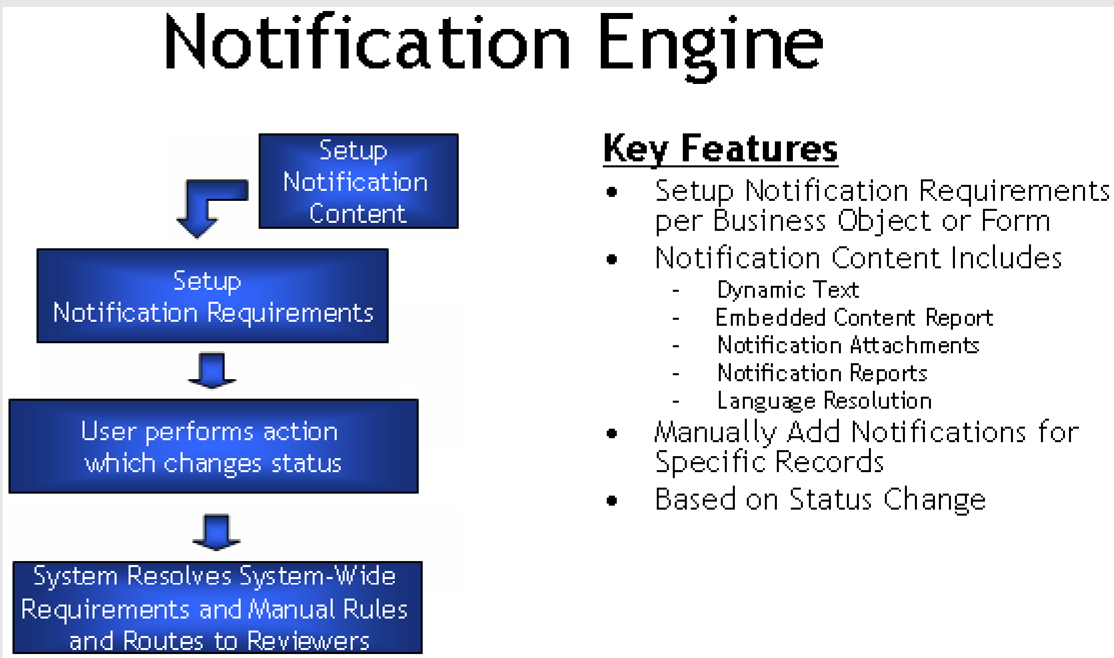
Step 2 Click **Delete**.

Note – If the News record has ever been activated, the record is retired, not deleted.

15. Notifications

The notification function sends an email each time the status of a record changes, for example, sending a notification to management whenever a purchase order is issued. To set up *Status Change Notifications* within IBM TRIRIGA, first develop the notification content and then specify the notification requirement to attach a status change notification to a business object or a form. In addition to the standard notification content and notification requirements that are delivered with the software, you can customize using the notification content and notification requirement functionalities. Notification function is available for IBM TRIRIGA's major business objects. If a business object has been preconfigured for status change notifications, it has a Notifications tab in its form with a Status Notification section.

The following chart depicts the features and flow of information through the Status Change Notification process.



The Notification Process

The following sections describe how to use the notification content and the notification requirement functionalities.

Notification Content

The first step is to establish the content of a notification. *Notification Content* records are used for status change notifications but also may be used for other notifications configured in workflows in IBM TRIRIGA or your customer application. The combination of the ID field and the Language field tells the workflow which notification to use for a particular process. Before you modify a notification content record, make sure you understand which workflows are using that content in their processes.

To Access the Notification Content Function

Follow the steps below to access the Notification Content function:

To Access the Notification Content Function

Step 1 Navigate to Tools > Approvals & Notifications > Notification Content.

The system displays the list of notification content records.

Step 2 From this window you can add, modify, or delete notification content.

To Add a Notification Content

Follow the steps below to add a Notification Content:

To Add a Notification Content

Step 1 Click **Add**.

The system opens a Notification Content form.

Step 2 In the General section of the General tab, specify a unique ID.

Note – The naming standard used is the module, business object, or form name with a sequential identifier.

Step 3 Specify a descriptive Name.

Use the Description field to detail exactly what the text and dynamic fields mean.

In the Details section, define the content of the notification:

Step 4 If the Language indicated is not correct, select from the choices in the drop-down list.

Step 5 Specify the subject of the notification in Notification Subject. Add parameters to your subject using curly braces and numbers (e.g., {1}). Up to nine parameters may be specified. The parameters are replaced at runtime when the notification is sent, based on data from the record that triggered the notification. The parameters must correspond to data fields defined in the workflow that sends the notification.

To Add a Notification Content

Step 6 In the Notification Content field, specify the text that is to be displayed in the body of the notification. Add parameters to your subject using curly braces and numbers.

> **Tip** – If you want to prepare the text outside of IBM TRIRIGA and copy it into a field, use a text editor like Notepad. If you use Word 2007, the result will not display as you expect because Word 2007 adds the Word style guide to the text.

> **Tip** – If you want to display a message containing a single quote (for example, `I'm {1}`), you need to escape the single quote by adding another single quote (for example, `I''m {1}`). If you need more than one single quote, add twice the number that you want displayed (for example, to display `''`, you would enter `''''`).

Step 7 If the notification is to include the text of a report in HTML in the body of the notification, specify an Embedded Content Report. Type a few characters to take advantage of autocomplete or click the Search icon and select from the list.

The document must be an HTML file with the appropriate tokenized fields.

> **Tip** –If you would rather send the report as an attachment, add it in the Notification Attachments section.

When the notification is to include a representation of an IBM TRIRIGA form, the fields in the Email Options section determine whether the notification email contains the record’s actions, a link to the record, or a print-preview style display of the record.

Step 8 The notification email can contain the record’s actions. When the email is sent, the platform determines the valid set of options based on the Group security of the email recipient and the current state of the record. Select the Display Actions? check box to have the system display the record’s actions in the email.

To Add a Notification Content

Step 9 Use the Link Display Option field to indicate how you want the record sent in the notification email. The choices in the drop-down list are as follows:

Option	Description
Blank	The email does not contain the record.
Link	The email contains a link to the record. The system opens the record when the recipient clicks the link. If the recipient is not signed into IBM TRIRIGA, they will have to sign in to see the record.
Read Only Form	The email contains a read-only print-preview version of the record's form. The form is the default for the record unless you specify a form name in the Email Form Overrides section.
Link & Read Only Form	The email contains both a link to the record and a print-preview style read-only image of the record. The form is the default for the record unless you specify a form name in the Email Form Overrides section.

Step 10 Sometimes the default form for the record is too big to display in the notification email or contains sections, tabs, or fields that are not relevant to the notification. If you want to display the record with a different form, specify the form name in the Email Form Overrides section.

Step 11 Click **Add** to add a form.

The system opens a Notification Form form.

Step 12 Select the Business Object from the drop-down list.

The choices in the Form drop-down list depend on the business object selected.

Step 13 Use Link Display Option to indicate how the record should be displayed. The values are described above.

Step 14 Specify a Form Override name as appropriate.

Step 15 Click **Create**.

The system adds the form to the Email Form Overrides section.

To Add a Notification Content

Step 16 If you want to send the same attachments every time the notification is sent, specify the list of attachments in the Notification Attachments section. An example of a notification attachment is a terms and conditions document for a purchase order.

Documents are discussed in the *IBM TRIRIGA 10 Document Management User Guide*.

Tip – To attach Microsoft Word or Excel files, save them as HTML first.

Step 17 Click **Find** to see a list from which you can select attachments. Click the check boxes beside the attachments and click **OK**.

Step 18 To remove an attachment from the list, click the check box beside the attachment, then click **Remove**.

Step 19 To bring in an attachment from outside the system, click **Upload**.

Step 20 If reports are to be sent along with the notification, specify them in the Notification Reports section.

Form reports are discussed in the *IBM TRIRIGA Application Platform 3 Reporting User Guide*.

Tip – If you would rather embed a form report in the notification, set the Embedded Content Report field to refer to that form report.

Note – These documents must be HTML files with appropriate tokenized fields.

Step 21 Click **Find** to see a list from which you can select reports. Click the check boxes beside the reports and click **OK**.

Step 22 To remove a report, click the check box beside the report, then click **Remove**.

Step 23 To bring in a report from outside the system, click **Upload**.

Step 24 Click **Activate** to create the notification content record.

To Modify a Notification Content

Follow the steps below to modify a Notification Content:

To Modify a Notification Content

Step 1 Select the hyperlinked name of the Notification Content you want to modify.

The system opens the record.

Step 2 Click **Revise**.

Step 3 When you have made your changes, click **Activate**.

To Delete a Notification Content

Follow the steps below to delete a Notification Content.

To Delete a Notification Content

Step 1 Click the check box beside the Notification Content that you want to delete.

Step 2 Click **Delete**.

Note – If the Notification Content record has ever been activated, the record is retired, not deleted.

Notification Requirement

This section defines the business rules for sending status change notifications. Even if you do not define recipients for status change notifications, the notification requirements define the available statuses for subscription or ad hoc status change notifications.

To Access the Notification Requirement Function

Follow the steps below to access the *Notification Requirement* function:

To Access the Notification Requirement Function

Step 1 Navigate to Tools > Approvals & Notifications > Notification Requirements.

The system displays the list of Notification Requirements.

Step 2 From this window you can add, modify, or delete a notification requirement.

To Add a Notification Requirement

Follow the steps below to add a Notification Requirement:

To Add a Notification Requirement

Step 1 Click **Add**.

The system opens a Notification Requirement form.

The information in the General section of the General tab is provided by the system when the notification requirement is activated.

Step 2 In the Invoking Record section, specify the business object, form, and status that will trigger the notification.

Step 3 Specify the Linked Business Object or select from the drop-down list. This identifies the business object to which this notification requirement is linked.

Step 4 If there is a Linked Form, select it from the drop-down list.

Note – If you select only a linked business object, all records that are created from that business object will use this notification requirement. If you select both a linked business object and a linked form, only those records that are created from the business object AND the form will use this notification requirement.

Step 5 Specify the Notification on Status or click the Search icon and select the appropriate status.

The notification will be sent when the status of the business object, and linked form if present, is changed to the selected status.

Step 6 In the Options section, link the content to be sent.

Step 7 Click **Notify Modified By** to send a notification to the last person who edited this record.

Step 8 For Notification Content, type a few characters to take advantage of autocomplete or click the Search icon and select from the list.

Note – The default status change notifications have six dynamic text fields that can be used in the message. You can use the standard notification content as your message or create your own content using these six fields: Record Name, Business Object Label, Form Label, Status, Submitted By, and the date the status change occurred. If you want more detailed notifications, create a tokenized report for the business object.

To Add a Notification Requirement

Step 9 If a specific person or role is to receive the notification, identify them In the Notify Person or Role section.

> **Note** – If you do not select people or roles to receive the notification, this notification requirement could still be used for ad hoc notification or for status change subscribers.

Step 10 To add a person or role, click **Add**.

The system opens a Notification Rule form.

Step 11 To add a role, click the radio button beside the word Role.

Step 12 Click the Search icon and select the Role.

Step 13 To select the source of the role, select from the Use Roles From drop-down list:

"Linked Record" refers to information in the record to which this approval is linked.

"Linked Record's Associated Geography" is the Geography listed in the record's System Geography field on the System tab.

"Linked Record's Associated Location" is the location listed in the record's System Location field on the System tab.

"Linked Record's Associated Organization" is the Organization listed in the record's System Organization field on the System tab.

"Linked Record's Associated Project" is the project listed in the record's Project field on the System tab. This is the project that is record was created in. This is only applicable if you are using IBM TRIRIGA 10 Projects function.

"Submitter's Associated" refers to information associated with the current user.

The Submitter's Geography, Location, and Organization are listed on the System tab of the record that identifies them in the system.

> **Note** – Be sure to select roles and role sources that are appropriate for your company's business rules for this business object.

Step 14 Click **Create**.

The system adds the role to the Notify Person or Role section.

Step 15 Use **Find People** or **Find Roles** to select from people or roles in the system.

Your selections are added to the Notify Person or Role section.

To Add a Notification Requirement

Step 16 To delete a person or a role, select the check boxes beside the Rule Types and click **Remove**.

The Subscribers section of the Notification Requirement shows users who have subscribed to this notification in their My Profile record.

The Excluders section shows users that have opted out of receiving this notification from their My Profile.

Step 17 Use the Groups Notified section to specify the groups that are allowed to subscribe to this notification. If a user is in one of the groups, they can subscribe from My Profiles on their home page.

Step 18 To add a group, click **Find**.

Step 19 Select the check boxes beside the appropriate groups.

Step 20 Click **OK**.

Step 21 Click **Activate** to activate the notification requirement.

To Modify a Notification Requirement

Follow the steps below to modify a Notification Requirement:

To Modify a Notification Requirement

Step 1 Select the hyperlinked name of the Notification Requirement you want to modify.

The system opens the record.

Step 2 Click **Revise**.

Step 3 Make the changes and click **Activate**.

To Delete a Notification Requirement

Follow the steps below to delete a Notification Requirement.

To Delete an Notification Requirement

Step 1 Select the check box beside the Notification Requirement that you want to delete.

To Delete an Notification Requirement

Step 2 Click **Delete**

Note – If the Notification Requirement record has ever been activated, the record is retired, not deleted.

Ad Hoc Notification from the Notifications Tab of Records

Business objects that have status change notification function also have a Notifications tab with a Status Change Notification section. You can see what status change notifications have been sent for a record in the Status Change Notification section and can manually add ad hoc status change notifications. The following steps provide an example of how to add an ad hoc status change notification to a record. The same steps can be used for other records that include the Notifications tab and the Status Change Notification section.

To Add Ad Hoc Status Change Notifications to a Record

Step 1 Navigate to the record. The following steps use the Purchase Order business object for purposes of illustrating the technique, so the navigation is Procurement > Requisitions & Purchase Orders > Purchase Orders. Click **Add** to open a new Purchase Order.

The system opens a Purchase Order form.

Step 2 In the General section of the General tab, specify the Name of the purchase order. Modify the Date if appropriate. Specify a Description of the purchase order.

Step 3 In the other sections, specify data as appropriate for the purchase order. Be sure to complete any required fields.

Step 4 Click **Create Draft**.

Step 5 Select the Notifications tab, scroll to the Status Change Notifications section, and click **Add Status**.

Only the statuses that have notification requirements for this business object display in the list of available statuses.

Step 6 Select the check box next to the statuses.

Step 7 Click **OK**.

Step 8 Click the status in the Status Change Notifications section.

The system opens the Notification Details form.

To Add Ad Hoc Status Change Notifications to a Record

Step 9 Click **Add People** on the Notifications Recipients section bar.

Step 10 Click the check box next to each person to receive this notification.

Step 11 Click **OK**.

Step 12 Click **Save & Close**.

Step 13 On the Purchase Order, click **Issue**.

The next time this record changes to the completed status, the people selected will receive a notification.

To see the requirements for this purchase order:

To See Requirements for Purchase Order

Step 1 Click the hyperlinked Name to open the record.

Step 2 Select the Notifications tab.

Step 3 Click the hyperlinked record to open it.

Step 4 Select the Advanced tab.

You can see what the Notification requirements have been resolved to for this record.

You can add manual approvers from here and can change Notification options.

Step 5 Click **Save & Close**.

Notification Tips

Tip
If a user wants to opt out of receiving notifications (i.e., exclude themselves), they can do so from their My Profile. Once in My Profile, select the My Notifications tab. The user can click **No Notification** in the Notifications Preferences section or change specific Notification Subscriptions and Notification Exclusions under tabs with those names. Click **Save & Close**.
If you set up a notification requirement without people, users can add themselves manually to notifications or subscriptions.
Set up the default notification content of each status change for all statuses you would like to allow users to add.

Tip

To see what notifications have been sent, go to the business object, select the Notifications tab, and look in the Status Change Notifications section. You can add in a manual requirement or status change here.

16. Offline Content

The *Offline Content* function is used to bring external data into the IBM TRIRIGA system. The user opens an offline content record, specifies data, and emails the populated form as an attachment to a configured incoming email address. The IBM TRIRIGA system parses this data and updates the appropriate tables.

Offline content is one of the methods for passing external Energy, Travel, Emission, Waste, Water, and Climate log data pertaining to multiple buildings into the IBM TRIRIGA system. This data is used by the IBM TRIRIGA Real Estate Environmental Sustainability products for calculations, reporting, and metric analysis. Other methods of providing environmental log data to the system include: (1) manually specifying log records in the corresponding log sections of the Building, Land, Retail Location, or Structure record, and (2) creating a custom integration.

Additionally, you can use the Offline Content function to specify bid responses, real estate lease abstracts, real estate transactions, and task invoices from external sources.

The “Offline Excel Spreadsheets” chapter in the *Application Building for the IBM TRIRIGA Application Platform 3* book describes how to configure the system for incoming offline content.

Note – Use the offline content records provided with the as-delivered system. If you need to make changes to the standard records, copy the standard record, rename the copy, and make the changes to the copy.

To Access the Offline Content Function

Follow the steps below to access the Offline Content function:

To Access the Offline Content Function

Step 1 Navigate to Tools > System Setup > Integration > Offline Content.

The system displays the list of offline content records.

To Use an Offline Content Form

Use the Offline Content records provided with the as-delivered system.

Using an Offline Content Form

The Water Log is used as an example here. The other environmental logs work similarly although the individual data attributes are specific to the type of environmental log.

Step 1 Select the Water Log by clicking the hyperlink.

Step 2 Click **Save**.

Using an Offline Content Form

Step 3 Select a location and click **Save**.

Step 4 Open the Log form.

Step 5 Review the instructions and note the data elements.

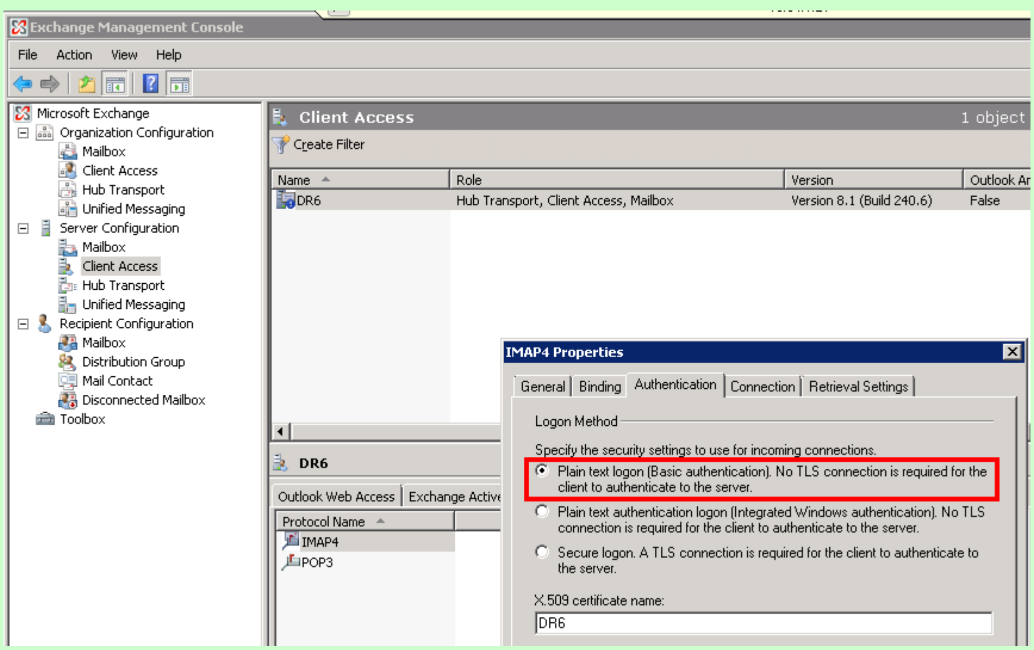
Step 6 Specify data.

Step 7 Email the populated form as an attachment to a configured incoming email address.

The system parses this data and updates the appropriate environmental log based on the Meter Type (Water, Energy, Emission, Travel, or Waste) or the Weather Station (Climate Log).

Step 8 Specify the incoming email address for Offline forms in the System Configuration record, which can be found at Tools > System Setup > Integration > System Configuration.

Note – If using Offline via Microsoft Exchange 2007, configure `Plain text logon (Basic authentication)` in Microsoft Exchange > Server Configuration > Client Access > IMAP4 Properties > Authentication tab, as illustrated below:



17. Passwords

Password Setup

To Access the Password Setup Function

Application-level security provides optional support for strong passwords. Using strong passwords lowers the overall risk of a security breach. Define your company's implementation in the Password Setup form.

Follow the steps below to access the Password Setup function:

To Access the Password Setup Function

Step 1 Navigate to Tools > System Setup > System > Password Setup.

The system displays the password setup options.

Step 2 From this window you can select the password details and rule requirements.

To Set Up the Password Details

Use the Details section of the Password Setup form to define your company's strong passwords. The following describes the fields in the Details section.

Field	Description
Enforce Password Rules	When selected, the IBM TRIRIGA application will use the password rules defined in the rest of the Password Setup form. When not selected, the system uses the standard IBM TRIRIGA password rules and ignores the rest of the values in the Password Setup form. This is the default value.
Prohibit Password Recycling	When selected, users will not be able to reuse one of their three prior passwords.
Password Expires	When selected, user passwords expire after the amount of time specified in Password Expiration Duration.
Password Expiration Duration	Sets how long a user can retain a password before the system requires them to provide a new one. Select the Calendar icon to set the amount of time.
Password Reminder	When selected, the system sends a user a reminder before their password expires.

Field	Description
Password Reminder Duration	Sets how long before a password expires that the system sends the user a password reminder. Select the Calendar icon to set the time.
Portal	Defines the portal a user sees when they are asked to reset their password. Select the portal from the drop-down list.
Default Security Group	Establishes the security group to which a user must belong to be able to change their password. Click the Search icon to select the Group.
Minimum Password Length	Specify the minimum size of a password. A password must contain at least this many characters.
Maximum Password Length	Specify the maximum size of a password. A password cannot be longer than this many characters.

The Optional Rule Requirements section contains parameters you can use to further define your company's strong password structure. The following describes the fields in the Optional Rule Requirements section.

Field	Description
Minimum Optional Requirements	Of the rules in the rest of the Optional Rule Requirements section, how many of the ones indicated to be Optional must be met by the user's proposed password before the system will accept the password. Values are `0`, `1`, `2`, `3`, or `4`.
Must contain at least one lowercase letter	Select `Required` or `Optional` from the drop-down list.
Must contain at least one uppercase letter	Select `Required` or `Optional` from the drop-down list.
Must contain at least one number	Select `Required` or `Optional` from the drop-down list.
Must contain at least one special character	Select `Required` or `Optional` from the drop-down list.

To give an example, assume Must contain at least one lowercase letter and Must contain at least one uppercase letter are Optional, the other rules are Required, and the user proposes `A1!2345` as a password. The value of Minimum Optional Requirements determines whether the system accepts the proposed password, as shown below:

Value of Minimum Optional Requirements in Example	Example Result
0	The system accepts the example proposed password.
1	The system accepts the example proposed password.
2	The system does not accept the example proposed password.
3	The system does not accept the example proposed password.
4	The system does not accept the example proposed password.

When you have finished customizing the Password Setup form, click **Save & Close**.

The system begins to follow the rules defined in the Password Setup record as soon as the record is in Active status. For current users, the system does not apply the rules across the board; rather, the system applies the rules the next time users attempt to change their passwords.

Force Password Reset

You can also reset the passwords for multiple selected users. On the next login of each selected user, the system will require a password change.

To Access the Force Password Reset Function

Follow the steps below to access the Force Password Reset function:

To Access the Force Password Reset Function

Step 1 Navigate to Tools > System Setup > System > Force Password Reset.

The system displays the Force Password Reset process form.

Step 2 From this window you can select the users and reset their passwords.

To Reset the Passwords

Follow the steps below to reset the passwords:

To Reset the Passwords	
Step 1	Click **Find** on the section bar.
Step 2	Select the check boxes beside the appropriate users.
Step 3	Click **OK**.
Step 4	Select the check boxes beside the appropriate users.
Step 5	Click **Reset Password** on the section bar.
Step 6	Click **Done** to return to the home page.

18. System Jobs

System Jobs within the IBM TRIRIGA Application Platform are part of IBM TRIRIGA Real Estate Environmental Sustainability. System Job Items define the job type and data capture period. The System Job Scheduler specifies when System Job Items are to run. The end result is data calculated and updated into business objects in logs.

The IBM TRIRIGA system runs a System Job Schedule only when the System Job Schedule is in active status.

System Job Item

System Job Items are used by the System Job Scheduler to trigger the workflows that perform the actual work of extracting data from source logs and business objects, calculating results, creating log entries, and updating business objects.

To Access the System Job Item Function

Follow the steps below to access the System Job Item function:

To Access the System Job Item Function

Step 1 Navigate to Tools > System Setup > Job Scheduling > System Job Item.

The system displays the list of system job items.

Step 2 From this window you can add, modify, or delete a system job item.

To Add a System Job Item

Follow the steps below to add a system job item:

To Add a System Job Item

Step 1 Click **Add**.

The system opens a System Job Item form.

Step 2 In the General section of the General tab, specify an ID for the system job item. If you do not, the system supplies one.

Step 3 Specify the Name of the system job item. The name should be unique.

Step 4 In the Description area identify what is unique about this system job item.

To Add a System Job Item

In the Details section:

Job Item Class is set to `System`.

Step 5 Select the Job Item Type from the drop-down list.

Step 6 For Calendar Period, type a few characters to take advantage of autocomplete or click the Search icon and select from the list.

Step 7 Click the Calendar icon next to Start Date and End Date to specify the date range.

The Metrics section summarizes the activity of this system job item.

The Average Duration is calculated based on the Total Duration and the # of Runs (Total Duration / Number of Runs).

The Logs section shows the time and status from each time this system job item has been run. This data is summarized in the Metrics section.

Step 8 Click **Create Draft**.

Step 9 Click **Activate**.

This system job item record is ready to be included in a System Job Schedule.

To Modify a System Job Item

Follow the steps below to modify a System Job Item:

To Modify a System Job Item

Step 1 Select the System Job Item you want to modify by clicking the hyperlinked name.

Step 2 Click **Revise**.

Step 3 Make the changes and click **Activate**.

To Delete a System Job Item

Follow the steps below to delete a System Job Item.

Attention – Do not delete the System Job Items provided by IBM TRIRIGA.

To Delete a System Job Item

Step 1 Click the check box beside the System Job Item that you want to delete.

Step 2 Click **Delete**.

Attention – Do not delete the System Job Items provided by IBM TRIRIGA.

System Job Scheduler

Use the *System Job Scheduler* to define when system job items are to run. A System Job Schedule must be in active status to run.

To Access the System Job Scheduler Function

Follow the steps below to access the System Job Scheduler function:

To Access the System Job Scheduler Function

Step 1 Navigate to Tools > System Setup > Job Scheduling > System Job Scheduler.

The system displays the list of System Job Schedulers.

Step 2 From this window you can add, modify, or delete a System Job Scheduler.

To Add a System Job Scheduler

Follow the steps below to add a System Job Scheduler:

To Add a System Job Scheduler

Step 1 Click **Add**.

The system opens a System Job Scheduler form.

In the General section of the General tab, the ID and Status are supplied by the system once the system job scheduler has been created.

Step 2 Specify the Name of the system job scheduler.

Step 3 In the Description area describe the purpose of this system job scheduler.

In the Schedule section:

Step 4 Use the Schedule Type drop-down list to select the frequency.

Step 5 To indicate that historic data should be included in the metrics calculated from the results of the activities in this system job schedule, select the Run Historic Captures? check box.

Step 6 The Start Date is the starting date of the first capture. Click the Calendar icon and select the date.

Step 7 The End Date is the ending date of the last capture. Click the Calendar icon and select the date.

Once this system job schedule is activated, this option instructs the System Job Scheduler to generate and run jobs where the Scheduled Date is earlier than "today." The parameters (e.g., Start Date/End Date) for that time frame/period will be passed into each system job item to simulate an historic capture.

Attention – *Run Historic Captures* is an advanced option and requires a complete understanding of how each script works.

Step 8 Click **Create Draft**.

Once you have specified system job items and activated this system job schedule record, the list of scheduled events for this system job schedule shows in the Scheduled Jobs section.

In the Job Items section:

Step 9 Click **Find** on the Job Items section bar.

To Add a System Job Scheduler

Step 10 Click the check box next to the desired system job items and click **OK**.

> **Note** – The list in the Job Items section will run in sequence number order.

Once this system job schedule is activated, the Metrics section summarizes logging data for this system job schedule.

The Average Duration is the calculated based on the Total Duration and the Number of Runs (Total Duration / Number of Runs).

Once this system job schedule is activated, the Logs section shows the time and status from each time this system job schedule has been run. This data is summarized in the Metrics section.

Step 11 Click **Activate**.

The IBM TRIRIGA system creates a set of System Scheduled Jobs based on the Schedule Type and Start and End Dates. These can be seen in the Scheduled Jobs section of the system job schedule.

To Modify a System Job Scheduler

Follow the steps below to modify a System Job Scheduler:

To Modify a System Job Scheduler

Step 1 Select the hyperlinked name of the System Job Scheduler you want to modify.

Step 2 Click **Revise**.

The system removes / cancels all Scheduled Jobs.

Step 3 Make the changes and click **Activate**.

The IBM TRIRIGA system creates a set of System Scheduled Jobs based on the Schedule Type and Start and End Dates. These can be seen in the Scheduled Jobs section of the system job schedule.

To Delete a System Job Scheduler

Follow the steps below to delete a System Job Scheduler.

Attention – Do not delete the System Job Schedulers provided by IBM TRIRIGA.

To Delete a System Job Scheduler

Step 1 Click the check box beside the System Job Scheduler that you want to delete.

Step 2 Click **Delete**.

Attention – Do not delete the System Job Schedulers provided by IBM TRIRIGA.

19. Thresholds

Metrics are an essential part of IBM TRIRIGA Workplace Performance Management, IBM TRIRIGA Real Estate Environmental Sustainability, and IBM TRIRIGA Strategic Facility Planning (SFP) products. Behind each metric are settings called thresholds that identify how metric values should be scored. IBM TRIRIGA delivers quite a few thresholds; however, it is likely that you will want to change the values to your organization's standards and best practices or to establish additional thresholds. The Threshold area of the Application Setup Manager is where you do this. Each *Threshold* record contains values, ranges, and colors. You can set up a threshold record to support three ranges (for example, low, medium, and high) or two ranges (for example, low and high). Which threshold records you need will depend on the metric data to be presented to your users.

To Access the Threshold Function

Follow the steps below to access the Threshold function:

To Access the Threshold Function

Step 1 Navigate to Tools > System Setup > General > Thresholds.

The system displays the list of thresholds.

Step 2 From this window you can add, modify, or delete a threshold.

To Add a Threshold

Follow the steps below to add a threshold:

To Add a Threshold

Step 1 Click **Add**.

The system opens a Threshold form.

Step 2 In the General section of the General tab, specify a unique Name for the threshold.

> **Note** – Be sure to describe what the threshold represents or the high and low values.

Step 3 In the Description area, identify what is unique about this threshold. For example, specify the formula to which the threshold corresponds.

To Add a Threshold

Step 4 Threshold Type identifies how many ranges there are in the threshold. Select from the drop-down list.

Select "2 Ranges" if the metric is divided into two parts. For example, if below a particular value is good and above that value is bad.

Select "3 Ranges" if the metric is divided into three parts. For example, if below a low value is very bad, between a low value and a high value is bad, and above the high value is acceptable.

Step 5 Planning Category identifies the threshold's category: Customer, Environmental, Financial, Operational, Portfolio, and Regulatory. Click the Search icon and select from the choices.

The *IBM TRIRIGA 10 Strategic Facility Planning User Guide* describes the importance of Planning Category in SFP.

The Details section is where you specify the threshold parameters.

When the Threshold Type is "2 Ranges":

Step 6 In Low Threshold, specify the value that separates one range from the other.

Step 7 For Range 1 Name, specify a descriptive word for the metric that is less than the Low Threshold.

Step 8 For Range 1 Color, select the text from the drop-down list that corresponds to what a value less than the Low Threshold represents.

Step 9 For Range 2 Name, specify a descriptive word for the metric that is equal to or greater than the Low Threshold.

Step 10 For Range 2 Color, select the text from the drop-down list that corresponds to what a value equal to or greater than the Low Threshold represents.

When the Threshold Type is "3 Ranges":

Step 11 In Low Threshold, specify the value below which represents the first range.

Step 12 In High Threshold, specify the value equal to or above which represents the third range.

Step 13 For Range 1 Name, specify a descriptive word for the metric that is less than the Low Threshold.

Step 14 For Range 1 Color, select the text from the drop-down list that corresponds to what a value less than the Low Threshold represents.

To Add a Threshold

Step 15 For Range 2 Name, specify a descriptive word for the metric that is equal to or greater than the Low Threshold and less than the High Threshold.

Step 16 For Range 2 Color, select the text from the drop-down list that corresponds to what a value equal to or greater than the Low Threshold and less than the High Threshold represents.

Step 17 For Range 3 Name, specify a descriptive word for the metric that is equal to or greater than the High Threshold.

Step 18 For Range 3 Color, select the text corresponding to what a value equal to or greater than the High Threshold represents from the drop-down list.

Step 19 Click **Create**.

This threshold is ready for use by the IBM TRIRIGA system.

To Modify a Threshold

Follow the steps below to modify a threshold:

To Modify a Threshold

Step 1 Select the hyperlinked name of the threshold you want to modify.

Step 2 Make the changes and click **Save & Close**.

To Delete a Threshold

Follow the steps below to delete a threshold.

To Delete a Threshold

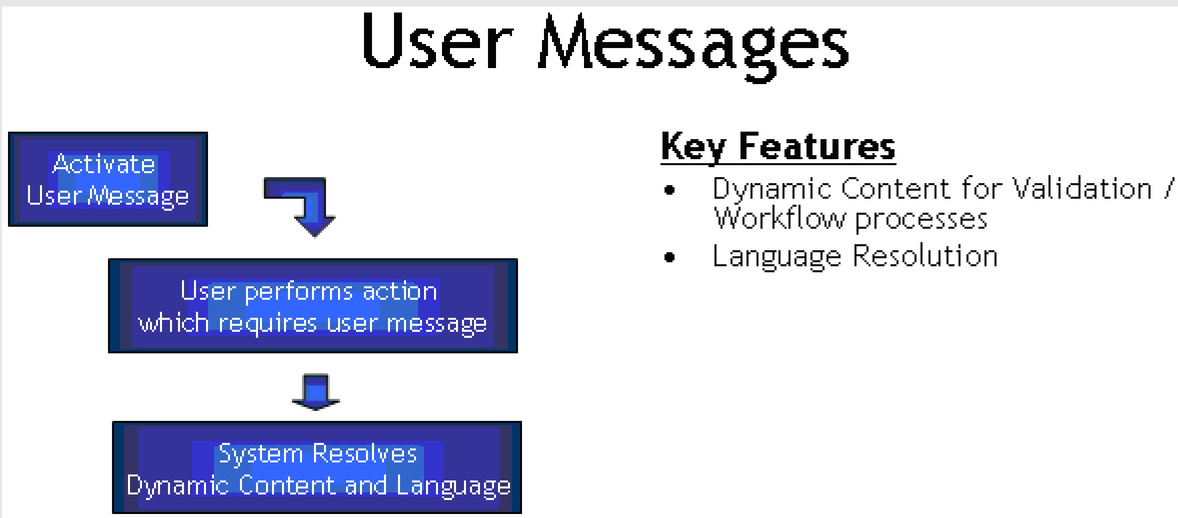
Step 1 Click the check box beside the threshold that you want to delete.

Step 2 Click **Delete**.

20. User Messages

The *User Message* function enables companies to set up standard user messages at development time and, because of dynamic text substitution, the text changes based on workflow or other circumstances while the system is being used. The ID field is used by the workflow to know which User Message record to use for a particular process. Before you modify a user message, make sure you understand which workflows are using that message in their processes. User messages employ text substitution to ensure the message is specific to the triggering action. The IBM TRIRIGA system messages are set up using the user message function.

The following chart depicts the features and flow of information in the User Message process.



The User Message Process

To Access the User Message Function

Follow the steps below to access the User Message function:

To Access the User Message Function

Step 1 Navigate to Tools > System Setup > General > User Messages.

The system displays the list of user messages.

Step 2 From this window you can add, modify, or delete a user message.

To Add a User Message

Follow the steps below to add a user message:

To Add a User Message

Step 1 Click **Add**.

The system opens a User Message form.

Step 2 In the General section, specify an ID for this user message.

> **Note** – The naming standard used is the module, business object, or form name with a sequential identifier.

Step 3 Specify a descriptive Name for the user message.

> **Note** – Use the name of the expected action or user group at the beginning of the name.

Step 4 In the Description area, detail exactly why this user message would be invoked and what the text and dynamic text fields mean.

> **Note** – Make the description not only describe the user message in simple language, but also define each dynamic text field.

Step 5 In the Details section, make sure the Language field is appropriate. If you need to change it, select from the drop-down list.

Step 6 An exclamation point is the default Flag. If you want a different flag to appear before the message, replace the `!`.

Step 7 In the Message Content section, specify the exact text that is to appear when the system deploys this user message. Add parameters to your message using curly braces and numbers (e.g., `{1}`). Up to nine parameters may be specified. The parameters are replaced at runtime when the message is sent, based on data from the record. The parameters must correspond to data fields defined in the workflow that sends the message.

> **Tip** – If you want to display a message containing a single quote (for example, `I'm {1}`), you need to escape the single quote by adding another single quote (for example, `I''m {1}`).

Step 8 Click **Activate**.

To Modify a User Message

Follow the steps below to modify a user message:

To Modify a User Message	
Step 1	Select the hyperlinked name of the user message you want to modify.
Step 2	Click **Revise**.
Step 3	Make the changes and click **Activate**.

To Delete a User Message

Follow the steps below to delete a user message.

To Delete a User Message	
Step 1	Click the check box beside the user message that you want to delete.
Step 2	Click **Delete**.

User Message Tips

Tip
You can employ user messages instead of hard coding text for messages into workflows. Maintenance is simpler because messages can be found in one place, the user message function, instead of buried in various workflows.
Create a user message for each language you support.
When the system needs to display a user message, it chooses the one in the user's language (as defined in their My Profile) and assumes the content is in that language.
If you want to display a message containing a single quote (for example, `I'm {1}`), you need to escape the single quote by adding another single quote (for example, `I''m {1}`). If you need more than one single quote, add twice the number that you want displayed (for example, to display `''`, you would enter `''''`).

21. User Profiles

Users can customize their profiles within the IBM TRIRIGA application. The steps involved in this process are explained below.

License

A valid license is required to access each IBM TRIRIGA application. Apply licenses to the server after the application is installed but before the application server is started, as described in the *IBM TRIRIGA Application Platform 3 Installation and Implementation Guide*. Save the license in the installation folder's `config` directory, for example, the `C:\Tririga\config\licenses` directory. For version 3.2 license files, each license will be its own file, with the name corresponding to the licensed product. For licenses generated before version 3.2, all licenses are in one file, which is named TRIRIGALICENSE.properties.

The License Manager determines which applications a user has privilege to. This along with Security Groups allow you to grant access to users and groups on applications, business objects, tabs, sections, and even field level permissions. A user may be assigned to more than one Security Group and License.

The IBM TRIRIGA products are listed in the License Manager. System Administrators create user profiles for all IBM TRIRIGA products.

Note – A license can be added to a user only if the user has been created in the People Manager.

To Manage User Licenses

The License Manager manages the list of users who can access the IBM TRIRIGA software.

To View Licenses in License Manager

Follow the steps below to view the list of product modules covered under your company's current licenses, and add or delete users corresponding to this list:

To View Licenses in License Manager

Step 1 Select the Tools menu item on the first level of the menu bar. Then select the License Manager link in the Tools – License and Security portal section.

The License Manager displays the list of product modules currently licensed in the left panel.

Step 2 To see which users are licensed to use a product, select the radio button next to a product's name in the left panel. The system displays the users licensed to use that product in the right panel.

Step 3 From this window it is possible to add users to the list or to delete users.

To Add Users to a License

Follow the steps below to add users to a license:

To Add Users to a License

Step 1 Click **Add Users**.

Note – The License Manager query on the Add User action can be customized. To have the system run your query instead of the default query, name your query *Security License List* in the Report Manager.

You will see a list of all users in the People Manager.

Step 2 Select the check box for each user to be added and click **OK**.

The selected users now have access to the product.

The licenses shown in the License Manager are synchronized with the licenses shown in users' profiles. Changes in one are reflected in the other.

To Delete Users from a License

Follow the steps below to delete users from a license:

To Delete Users from a License

Step 1 Select the check box for the users to be deleted.

Step 2 Click **Delete Users**.

The system requests confirmation before deleting the users.

Step 3 Click **OK**.

The selected users no longer have access to the product.

Security

The IBM TRIRIGA applications enable you to specify security settings to maintain the integrity of the records. The *Security Manager* administers security. The Security Manager maintains the security access levels for all users of the IBM TRIRIGA application. The Security Manager is essential to system setup. Defining user and group access restricts the security level of users to their areas of work.

Security access may be defined at the module, business object, tab, or section level for all objects in the system. A security administrator uses the Security Manager to manage security settings based on organization, geography, business object, and reports.

Note – The aggregated security of the user is applied, not just the security of the group that is associated. If a user is in more than one group, the permissions are aggregated to the most permissive level. For example, if one security group grants the user no access and another grants update access, the user has update access.

To Access the Security Manager

To Access the Security Manager

Step 1 Select the Tools menu item on the first level of the menu bar. Then select the Security Manager link in the Tools – License and Security portal section.

The system displays the available groups in the Group business object.

Step 2 From this window you can add, edit, or delete groups.

To Add a Group

Follow the steps below to add a group:

To Add a Group

Step 1 Click **Add**.

The system opens a Group form. Each of the tabs represents details to be specified about the group.

In the General section:

Step 2 Specify the Name of the security group.

Step 3 Provide a brief Description of the security group.

Step 4 Specify if Personalize Portal and Personalize Bookmarks are allowed. Personalize Portal allows the members of the group to customize their portal. Personalize Bookmarks allows the members of the group to add IBM TRIRIGA bookmarks.

To Add a Group

Step 5 In the Data Access section, System Organization field, use the Search icon to select the appropriate Organization access from the list.

For the System Geography field, use the Search icon to select the appropriate Geography access from the list.

When an access level is selected for System Organization or System Geography, members of the security group will be able to see all records at that level of the hierarchy and below. A security group can have only one level of organizational or geographical access, but an individual user may be assigned to multiple security groups.

Step 6 The Members tab displays the current users of this group. You can add users and groups to the current member list.

Step 7 To add users to the group, click **Add Users**.

The users displayed are users that have been added to the system through the People Manager.

Step 8 Select the users that you want to add to the group by clicking the check boxes. Click **OK**.

Step 9 To add groups to the group, click **Add Groups**.

The Group Search Results page appears.

Step 10 Select the groups you want to add to the security group by clicking the check boxes. Click **Accept**.

The Access tab displays the available objects (e.g., managers, modules, business objects, classifications) in a tree structure in the left Object panel.

Step 11 Click an object from the tree structure to select it.

The system displays the list of available permissions in the right panel.

Step 12 In the Data Access section, select the radio button next to the permission for this object for this group. The permissions are defined immediately below.

To Add a Group

Step 13 In the Application Access section, select the check box next to a permission to grant access for this group for this object.

The data access permissions are as follows:

Data Access Permission	Description
No Access	The object is not visible to the user. This is the default option.
Read	The user can view the object but cannot modify it.
Update	The user can both view and modify the object.
Create	The user can create a new object using the current object.
Delete	The user can delete the object.

Step 14 Click **Create**.

Repeat this process to set additional permissions.

Step 15 Once you have specified all the information for the group, select the General tab and click **Create**.

Step 16 Click **Save & Close**.

Attention – Do NOT copy or delete the Admin Group.

Preferences

IBM TRIRIGA applications enable customization of a user's interface based on their preferences for language, currency, time, date, and area and length units of measure. This can be accomplished either by the user directly from their portal, or by an administrator accessing the user's My Profile.

User's My Profile

The place for a user to tell the system about their preferences is their *My Profile* record. A user accesses their My Profile record as follows:

To Access Preferences in Your My Profile Record

Step 1 Navigate to Portfolio > People > My Profile.

The system opens your My Profile page.

Tip – Depending on your system's configuration, you also can click the **Welcome, *Your Name*** hyperlink to access your My Profile record.

Step 2 Select the My Profile tab.

In the Preferences section:

The default language is `US English`. If translations are available in the language you prefer, you can change the language preference:

Step 3 Select the appropriate Language from the drop-down list.

Note – You can change the values in the Language list in the List Manager.

The default currency is `US Dollars`. To change the currency default:

Step 4 Select the appropriate Currency Default from the drop-down list.

Note – You can change the values in the Currency Default list in the List Manager.

To Access Preferences in Your My Profile Record

You can change the time zone to the one in which you are working. This will be the time attached to each record you create.

Step 5 Select the Search icon next to Time Zone. Choose the appropriate time zone from the available entries.

> **Note** – If Time Zone is blank, the system uses the value in the `SYSTEM_DEFAULT_TIMEZONE` property of `TRIRIGAWEB.properties`. The *IBM TRIRIGA Application Platform 3 Installation and Implementation Guide* has detailed information about `TRIRIGAWEB.properties`.

The Date Format field controls the formatting of date fields. You can change the date format.

Step 6 Select the appropriate Date Format from the drop-down list.

> **Note** – You can change the values in the Date Format list in the List Manager.

The Date Time Format field controls the formatting of date and time fields. You can change the date time format.

Step 7 Select the appropriate Date Time Format from the drop-down list.

> **Note** – You can change the values in the Date Time Format list in the List Manager.

The Area Unit Default field specifies a preferred area unit. When creating a new record, if the My Profile record for the user specifies an area unit default, that area unit is the default for all unit of measure fields named `triAreaUO`. If no area unit is specified in the user's My Profile record, the area unit is the default specified for the field.

Step 8 Select the appropriate Area Unit Default from the drop-down list.

> **Note** – You can change the values in the Area Unit Default list in the List Manager.

To Access Preferences in Your My Profile Record

The Length Unit Default field specifies a preferred length unit. When creating a new record, if the My Profile record for the user specifies a length unit default, that length unit is the default for all unit of measure fields named `triLengthUO`. If no length unit is specified in the user's My Profile record, the length unit is the default specified for the field.

Step 9 Select the appropriate Length Unit Default from the drop-down list.

Note – You can change the values in the Length Unit Default list in the List Manager.

When the Show Save Settings Confirmation? check box is checked, when a user clicks the **Save Settings** action in a metric report, the user sees a message indicating that the current drill path selection has been saved as a preferred starting point.

Step 10 Select the Show Save Settings Confirmation? check box, if appropriate.

Step 11 When the settings in the Preferences section are the way you want them, click **Save & Close**.

The settings take effect the next time the user signs in or presses <F5>.

Administrator Accesses User's My Profile

An administrator can access a user's *My Profile* record starting from the `triPeople` record for that person. Once in the user's My Profile record, the steps to change the values in the Preferences section are as described above.

To Access Preferences in Another User's My Profile Record

Step 1 Navigate to Portfolio > People > Employees (or Consultants or External Contacts).

Step 2 Select the user's record by clicking the hyperlinked Name.

Step 3 Click **Revise**.

Step 4 Select the Profile tab.

Step 5 Make any changes to the Preferences section. The prior part of this chapter describes the fields.

Step 6 Click **Activate**.

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