

IBM TRIRIGA Application Platform
Version 3 Release 5.2

User Experience User Guide



Note

Before using this information and the product it supports, read the information in “Notices” on page 19.

This edition applies to version 3, release 5, modification 2 of IBM TRIRIGA Application Platform and to all subsequent releases and modifications until otherwise indicated in new editions.

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Contents

Chapter 1. Configuring the user experience	1
---	----------

Chapter 2. Customized Sign In pages	3
--	----------

Chapter 3. Configuring Sign In pages	5
---	----------

Chapter 4. Customizing portals and portal sections	7
---	----------

Portal sections	7
-----------------	---

Adding portal sections	8
------------------------	---

Customizing portals	9
---------------------	---

Chapter 5. Customizing navigation components	11
---	-----------

Navigation components	11
-----------------------	----

Adding navigation items	12
-------------------------	----

Customizing navigation collections	13
------------------------------------	----

Customizing navigation components for security groups	14
---	----

Chapter 6. Customizing visual components	15
---	-----------

Styles and colors	15
-------------------	----

Customizing styles	15
--------------------	----

Restoring the default styles	16
------------------------------	----

Customizing the colors of the application components	16
--	----

Style sheets	16
--------------	----

Creating style sheets	17
-----------------------	----

Customizing portal banners	17
----------------------------	----

Customizing report logos	18
--------------------------	----

Notices	19
----------------	-----------

Trademarks	21
------------	----

Terms and conditions for product documentation	21
--	----

IBM Online Privacy Statement	22
------------------------------	----

Chapter 1. Configuring the user experience

If you have administrator privileges, you can use the IBM® TRIRIGA® tools to create a customized IBM TRIRIGA environment. Customization can include sign-in pages, portals and portal sections, navigation, and visual elements, such as colors and banners.

When you build custom applications, log in as an English language user. If you build applications in a non-English language, the screen elements might contain some English and some non-English content.

Chapter 2. Customized Sign In pages

If you have administrator privileges, you can customize IBM TRIRIGA Sign In pages for your company. Customization can include changing the default Sign In page image and creating alternative Sign In pages. For example, you might want to add special instructions to your Sign In page.

The only image that can be replaced in the default Sign In page is the `login_image_175x175.png` file. This file is typically in the `C:\TRIRIGA installation folder\userfiles\images` directory. This file is copied from IBM TRIRIGA versions 3.2 and later during an upgrade.

You can create a Sign In page to replace the default Sign In page. To create a Sign In page, use the `index.html` template file, which is typically found in the `C:\Tririga\userfiles\alt\` directory. This file contains the design elements that are needed to use the existing IBM TRIRIGA sign-in functionality. For more information about the template sign-in page and how to use it, see the `Readme.txt` file that is in the same directory as the template file.

Chapter 3. Configuring Sign In pages

After you set up an alternative Sign In page, you configure IBM TRIRIGA to use the alternative Sign In page.

Procedure

1. To open the Administrator Console, in a browser window address line, enter:
`http://hostname:port/context_path/html/en/default/admin`.
2. In the Managed Objects pane, select **System Manager**.
3. In the Property Files section, on the **TRIRIGA Web** line, click **Edit**.
4. Set the **ALTERNATE_RESOURCE_DIRECTORY** property to the directory that contains the alternative Sign In page, for example `C:/Tririga/userfiles/alt`.
5. Set the **ALTERNATE_INDEX_HTML** property to the file name of your alternative Sign In page. This file must be in the directory that is defined in the **ALTERNATE_RESOURCE_DIRECTORY** property, for example, `index.html`.
6. Click **Save**.
7. In the Managed Objects pane, select **Logout**.
8. Restart the application server.

Chapter 4. Customizing portals and portal sections

IBM TRIRIGA delivers standard portals and portal sections that are set up for many of the user roles in your company. Administrators can modify existing portals and portal sections and can create portals and portal sections by using the Portal Builder tool.

Portals are the central organizing element of IBM TRIRIGA. All IBM TRIRIGA functionality can be accessed through portals and portal sections. Users typically see only the portals that are associated with their user roles.

Portal sections

Portal sections are the building blocks of portals. Portal sections are areas within a portal. The standard portal sections include system components that provide data and navigation help, action items, and notifications.

The main categories for portal sections include portal section types that you define and system portal section types that the IBM TRIRIGA Application Platform defines.

The portal sections that you can define include the following types:

Report

Contains the results of any IBM TRIRIGA report, such as example, graphic, chart, report, and hierarchical.

External

Contains the result of a metric query for the Workplace Performance Manager user role.

Scorecard

Displays a Quick Links type of navigation collection.

Form - Record add

Displays a form for creating a record.

Form - Record view

Displays a record in the record's form.

The system portal sections include the following types:

sysActionItems

Displays a list of the action items that require an action by the user who is logged in.

sysLastVisited

Displays the last locations that the user opened.

sysNotifications

Displays a list of the notifications that were sent to the user and not deleted.

sysSelfService

Provides access to the **Request Central** menu.

Adding portal sections

To add portal sections, you use the Portal Sections Library component of the IBM TRIRIGA Application Platform. Each portal section can have a specific header color, header font, weight, size, type, background color, and image.

Before you begin

Before you create or modify portals, the portal sections that you plan to use must be in the Portal Sections Library that is included in the Portal Builder tool.

Procedure

1. Select **Tools > Builder Tools > Portal Builder**, and click **Add**.
2. At the bottom of the Portal Builder page, click the **Portal Sections Library** section bar.
3. Click **New**.
4. In the Portal Section window, specify the name, header, and type of portal section, and click **Apply**.
5. Specify the following information for all portal section types:

Option	Description
Tooltip	The text that is displayed when a user hovers the mouse over the portal section title or color.
Related Links	A reference to a navigation collection from the Navigation Builder.
Background Image	If you specify an image, the background of the portal section is tiled with the image. When a background image is specified, the background color is not visible.
Scope	Leave Company selected.
Auto Refresh	Refreshes the contents of the portal section periodically with current data.
Refresh Time	When Auto Refresh is selected, specify the refresh time period in seconds.

6. Depending on the portal section type, specify the following additional information:

- For a Report portal section, specify the following information.

Table 1. Fields for a Report portal section type

Field	Description
Query	Select the IBM TRIRIGA report.
Show Query Actions	Display the report's actions in the portal section header.
Max Records Displayed	The maximum number of records to display in the portal section. The default value is 10. For a value of 100 or more, the report section shows the actions that a user can select in a full report view, such as filter and export.

- For an External portal section, specify the URL to open in the portal section. Only external http URLs and internal URLs can be used in the portal section.
- For a Scorecard portal section, in the **Scorecard** field, specify the name of the scorecard.

- For a Quick Links portal section, in the **Quick Links Collection** field, specify the navigation collection to display. The drop-down list displays only the navigation collections that are quick links.
- For a Form - Record Add portal section, specify the following information.

Table 2. Fields for a Form - Record Add portal section type

Field	Description
Module	The module to use to create the added record.
Form	The form to use to create the added record.
Pre-Create Workflow	The workflow to run before the record is created.

- For a Form - Record View portal section, in the **Query** field, click the search icon and select the query to run for the report. Only the first result that is returned by the query is shown in the record form.
7. When finished, click **OK**.

Customizing portals

With the Portal Builder tool, you can add, copy, edit, and delete portals. For example, you might need to remove sections from a portal to streamline the portal. Or, you might need to build a portal for a new user role.

Before you begin

You can create a portal by clicking **Add** or by copying and editing an existing portal. To prevent the new portal from being overwritten at upgrade, follow the naming conventions in the *Chapter 1, Naming conventions* section of *Application Building for the IBM TRIRIGA Application Platform 3*.

The portal sections that you need for new or edited portals must be available in the Portal Sections Library.

Procedure

1. Select **Tools > Builder Tools > Portal Builder**, and select **Add**.
2. In the Portal Properties pane, specify the name, label, description, and layout for the portal.
3. Save the properties and then click **OK**.
4. Click the **Portal Sections Library** section bar, and for each portal section to add to the portal, select the portal section and click **Add to Portal**.
5. Optional: You can modify the portal layout in the following ways:

Option	Description
Rearrange the portal sections	Select a portal section bar and drag the portal section to a new location.
Remove portal sections	Click the X icon in the portal section bar.
Adjust the layout of portals	Click the Portal Properties section bar and select a different value for the layout.

Option	Description
Specify the portal sections that a user can add to the portal during personalization of the portals	For each portal section to add, select the Related Portal Sections tab, in the Portal Sections Library pane, select the portal section, and click Add to Related Portal Sections List .
Remove related portal sections	In the Related Portal Sections tab, select the portal section and click Delete .

6. When finished, click **Save**.

Chapter 5. Customizing navigation components

IBM TRIRIGA delivers standard navigation collections and navigation items that are used to access IBM TRIRIGA portals. Administrators can modify navigation items and navigation collections and can create navigation items and navigation collections by using the Navigation Builder tool.

Navigation collections are the central navigation element of IBM TRIRIGA. Navigation collections contain navigation items that are targets, such as portals, charts, tools, menu items, and UX applications. All IBM TRIRIGA portals can be accessed through navigation collections and navigation items. Users typically see only the navigation components that are associated with their user roles.

Navigation components

Navigation components specify how users can move through the IBM TRIRIGA portals. Administrators use the Navigation Builder tool to manage portal navigation.

The navigation components include the following elements:

Navigation collection

Hierarchical structures that contain one or more navigation items.

Navigation collections can be associated with multiple users and can be invoked from more than one place in IBM TRIRIGA.

Navigation collections can be of the following types:

Menu Contains menu items that are intended for use in a primary menu. The navigation collection cannot have more than four levels of navigation.

Quick Links

Contains links that are intended for use in a Quick Links portal section. The navigation collection cannot have more than two levels of navigation.

Related Links

Contains links that are intended for use in any portal section type. The Related Links property in the portal section form associates a related links navigation collection to a portal section. The navigation collection cannot have more than one level of navigation.

Navigation items

Elements of a navigation collection, such as landing pages, calendars, charts, hierarchies, reports, applications, and menu groups. A navigation item can be referenced from multiple navigation collections.

Navigation targets

IBM TRIRIGA content or external content that can be navigated to, such as forms, query master or detail displays, scorecards, the Data Modeler tool, and external URLs.

Adding navigation items

To add navigation items, you use the Navigation Items Library component of the IBM TRIRIGA Application Platform. Navigation items identify the targets that users can navigate to. Navigation items are the building blocks of navigation collections.

Before you begin

The navigation items that you plan to use must be in the Navigation Items Library that is included in the Navigation Builder tool.

About this task

You can create navigation items by adding a navigation item or by copying and editing an existing navigation item. To prevent the new navigation items from being overwritten during upgrade, follow the naming conventions in the *Chapter 1, Naming conventions* section of *Application Building for the IBM TRIRIGA Application Platform 3*.

To prevent rendering issues, avoid special characters such as /, \, &, #, and %, in the names of custom navigation items. For example, instead of the ampersand "&", use the word "and" in the navigation item name.

Procedure

1. Select **Tools > Builder Tools > Navigation Builder**, and click **Add**.
2. At the bottom of the Navigation Builder page, click the **Navigation Items Library** section bar.
3. Click **Add**.
4. In the Navigation Item Editor window, specify the name and label.
5. Click **Save** and then click **OK**.
6. Specify the following information for the navigation item:

Option	Description
Help Text	The text that is displayed when a user hovers the mouse over the navigation item.
Visible in Sitemap only	The navigation item is not visible in the menu. The navigation item is visible in the user's sitemap and when it is incorporated into a portal section. If the navigation item is also specified as a dynamic label, only the static portion of the label is displayed in the sitemap.
Dynamic Label	The label text is displayed to the user until the dynamic label values are displayed.

7. Depending on the sections that open in the Navigation Item Editor, you can specify the following information:
 - In the Icon Details section, you can specify an icon that is displayed next to the navigation item's label. For the icon to display, the navigation item must be part of a Portal section whose Type is set to 'Quick Links' and whose 'Large View - Includes Icons' radio button is selected in the Portal Builder. The icon name is assigned by IBM TRIRIGA after you upload the icon image to the userfiles\images folder of the IBM TRIRIGA installation directory.

- In the Target Details section, specify the navigation target type and the target title. Depending on the target type that you select, the following fields might be shown:

Field	Description
Application	The UX application for the target.
Business Object	The business object for the query that is associated with the selected hierarchy.
Default Query Columns	The fields to display in the form for the query results.
Default Report	The report that is used as the query in scoreboard panes.
External URL	The complete URL path to the target.
Form	The form that displays the results of a query.
Modify Hierarchy	The hierarchy can be changed from the navigation item.
Module	The module to use to populate the target form.
Record Add	The module, business object, and report for the optional workflow to run before the form is shown.
Report	The report for the query that is associated with the selected hierarchy.
Special Views	The special views that are defined for the selected hierarchy.
Where Used	Navigation collections that reference the navigation item.

8. Click **Save & Close**.

Customizing navigation collections

With the Navigation Builder tool, you can add, copy, edit, and delete navigation collections. For example, you might need to remove items from a menu or access a new portal for a new user role.

Before you begin

The navigation items that you need for new or customized navigation collections must be available in the Navigation Items Library that is included in the Navigation Builder tool.

About this task

You can create a navigation collection adding a new collection or by copying and editing an existing navigation collection. To prevent the new navigation collections from being overwritten during upgrade, follow the naming conventions in the *Chapter 1, Naming conventions* section of *Application Building for the IBM TRIRIGA Application Platform 3*.

Procedure

1. Select **Tools > Builder Tools > Navigation Builder**, and select **Add**.
2. In the Navigation Collection Properties pane, specify the name, label, description, help text, and type for the navigation collection.
3. Save the properties and then click **OK**.
4. Click the **Navigation Items Library** section bar, select each navigation item, and click **Add to Collection**.

5. When finished, click **Save**.
6. Optional: In the **Navigation Items** tab, you can drag a navigation item to a different location in the list, clear the fields in a selected navigation item, and delete a selected navigation item.

Customizing navigation components for security groups

Administrators can hide navigation items in navigation collections from users in a security group. Administrators can also specify that a navigation item has a specific target for a security group.

Procedure

1. Select **Tools > Builder Tools > Navigation Builder**, select the navigation collection to modify, and click **Edit**.
2. In the **Group Overrides** tab, select the security group.
3. Optional: For each navigation item to hide from the selected group, select **Hide From Group**.
4. Optional: For each navigation item to have a group-specific target, click **Edit**, specify the target type, select **Hide From Group**, and click **Save & Close**.
5. When finished click **Save and Close**, and then click **OK**

Chapter 6. Customizing visual components

If you have IBM TRIRIGA administrator privileges, you can customize the visual components, such as colors and images for IBM TRIRIGA components, such as portals, fields, and banners.

Styles and colors

IBM TRIRIGA provides a default set of styles and colors that you can customize for your company. You can use the Style Manager tool to customize the style and color values.

The **Export** action in the Style Manager tool downloads the current stylesheet.xml file from the production location to a location that you specify. After you change the stylesheet.xml file, you use the **Import** action to upload the file and apply the colors and styles to IBM TRIRIGA. The import action applies only the styles in the stylesheet.xml file; all other styles remain unchanged.

Customizing styles

IBM TRIRIGA provides a set of standard styles and colors in the default stylesheet.xml file. You can use your own styles and colors by replacing the default file with a customized version of the file.

Before you begin

Back up any custom colors that you use.

About this task

The stylesheet.xml file is typically in the C:\Tririga installation directory\userfiles\skin directory.

Procedure

1. Select **Tools > Administration > Style Manager**.
2. Download the current production stylesheet.xml file by clicking **Export** and saving the file.
3. Edit the file to add your custom styles and colors.
4. Save the file as the stylesheet.xml file in your C:\Tririga installation directory\userfiles\skin directory.
5. Upload the stylesheet.xml file in the Style Manager by clicking **Import**.
6. Browse to select your edited file and click **Import**.
7. Clear the browser cache.
8. Clear the portal logo cache by restarting the application server or by using the IBM TRIRIGA Administrator Console. In the Administrator Console, select **Cache Manager**, in the Flush a Cache section, click **Portal Logo**, and select **Logout**.

Restoring the default styles

IBM TRIRIGA provides a set of standard styles and colors in the default stylesheet.xml file. You can replace a customized stylesheet.xml file with the default file by restoring the default file.

Before you begin

Back up any custom colors that you use.

About this task

The stylesheet.xml file is typically in the C:\Tririga installation directory\userfiles\skin directory. A template file that is named green.xml or blue.xml is typically in the same directory as the stylesheet.xml file. You can use the template file to rebuild the default stylesheet.xml file.

Procedure

1. Save the green.xml or blue.xml file as the stylesheet.xml file in the C:\Tririga installation directory\userfiles\skin directory.
2. In the Style Manager, click **Import**.
3. Clear the browser cache.
4. Clear the portal logo cache by restarting the application server or by using the IBM TRIRIGA Administrator Console. In the Administrator Console, select **Cache Manager**, in the Flush a Cache section, click **Portal Logo**, and select **Logout**.

Customizing the colors of the application components

With the Style Manager tool, you can customize the colors that are used in portals, manager tools, wizards, IBM TRIRIGA objects, form styles, and rich text editor styles. For example, you might want to change the background color for portals.

Procedure

1. Select **Tools > Administration > Style Manager**.
2. In the Style Manager page, select the component to customize, such as **Portal**, **Manager**, or **Wizard**.
3. In the Visual Components pane, select a component.
4. In the color palette, select the color for the component.
5. Optional: To preview a color change, click **Use Value**.
6. Click **Save**.

Style sheets

To apply style selections consistently throughout a IBM TRIRIGA application, use the Style Sheet Editor. For example, you can change the color scheme to match your company's colors.

In the IBM TRIRIGA Application Platform, fields have a Label Style Class property that determines the appearance of the field label. Fields also have a Data Style Class property that can determine the appearance of the field data. Sections and tabs have a Style Class property that determines their appearance.

Use the Section Style property only for section elements, such as background color, border color, and width. For labels that are contained inside the sections, use the Label Style Class property to specify attributes that are related to fonts, such as weight, size, and style.

Creating style sheets

You create a style sheet for tabs, fields, or sections by using the Style Sheet Editor. Not all of the properties apply to all types of style sheets.

Procedure

1. Select **Tools > Administration > Style Manager > Style Sheet Editor**.
2. Click **Add**.
3. In the Style Sheet Editor window, specify the name and type of style sheet.
4. Specify the properties.
5. When finished, click **Save**.

Customizing portal banners

Portal banners can be customized to match your company standards.

About this task

If you have administrator privileges, you can change the logo image, links background images, and colors for portal banners. For the default GIF banners, you can customize the left logo image and the links background image. For Color banners, you can customize the left, center, or right logo image and the links background image.

The height of a portal banner adjusts to the height of the custom logo image. Because background images typically do not scale, make the background image the same height as the custom logo image. Make all custom images the same height.

The following table lists the specifications for portal banners:

Banner image	Location	Required file name	Standard size in pixels
Custom logo image for GIF banner	Upper left	logo.gif	Height = 40, width = 236
Custom logo image for Color banner	Upper left, center, or upper right	logo.gif	Height = 18, width = 149
Custom links background image	Upper right	linksBackground.gif	Height = 40, width = 334

Procedure

1. Load your images to the `C:\TRIRIGA installation folder\userfiles\images` directory.
2. Select **Tools > Style Manager > TRIRIGA Objects**.
3. In the Visual Components pane, view the type of banner that you are customizing.
4. In the **Portal Top Objects Positioning** area, select the location for each image type.
5. Optional: To see a preview of the changes, click **Use Value**.

6. Click **Save**.
7. Clear the browser cache.
8. Clear the application server cache by restarting the application server or by using the IBM TRIRIGA Administrator Console. In the Administrator Console, select **Cache Manager**.
9. In the Flush a Cache section, click **Portal Logo**.
10. Select **Logout**.

Customizing report logos

If you have administrator privileges, you can customize the logo that appears on standard and on Business Intelligence and Reporting Tools (BIRT) reports.

Before you begin

Use an image that is 219 x 57 pixels.

Procedure

1. In the Document Manager, check out the COMPANY_LOGO (logo.bmp) file.
2. Update the logo.bmp file with your image.
3. In the Document Manager, check in the COMPANY_LOGO file.

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