This information applies to all currently supported versions of IBM TRIRIGA.

IBM® TRIRIGA® is an integrated workplace management system (IWMS) that delivers a single platform technology and core business applications to manage the lifecycle of real estate and facilities assets. Follow these best practices to ensure that the business applications function properly and that future upgrades of the applications are successful.

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I. Best Practices - Configuring TRIRIGA applications

A. Before making configuration changes to TRIRIGA applications

- Gain an understanding of the "as shipped" TRIRIGA applications and adapt your business processes to TRIRIGA rather than adapting TRIRIGA to your business processes.

TRIRIGA applications are developed based on industry best practices and standards. As industry best practices and standards evolve over time, the TRIRIGA applications are enhanced accordingly. When you adopt the "as shipped" TRIRIGA applications, you incorporate the enhanced applications at each TRIRIGA upgrade. See:

  - Application overview videos on the YouTube ibmTRIRIGA channel
  - Product details, videos, and guided demos on typical tasks on the IBM Marketplace site
  - IBM TRIRIGA UX Framework YouTube playlist

- Set up a base, "as shipped" environment that contains no configuration changes to the applications. This environment would be in addition to your development, user acceptance testing (UAT), and production environments. The purpose of the "as shipped" environment is to verify that a particular issue is caused by something in the base product versus something in a custom object. See the Best Practices to improve customer support entry in the IBM TRIRIGA Customer Support blog.

- Identify an experienced, certified TRIRIGA expert to be responsible for configuration changes. This person should have deep knowledge of and experience with TRIRIGA Object Migration and Application configuration.

- Evaluate the necessity of each configuration change that you make. The more configuration changes that you make to an application, the more potentially challenging it can be to upgrade the application when new releases of TRIRIGA become available.

- Use recommended naming conventions for your configurations. Following these conventions can reduce unexpected interactions between applications that are provided by IBM TRIRIGA and applications that are created by Business Partners and IBM Global Business Services, and can help ensure that upgrades go smoothly.

Naming conventions are in the Application Building for the IBM TRIRIGA Application Platform 3 (pdf) user guide:

- Chapter 1, Naming Conventions section
- Chapter 7, Workflow naming conventions section

Note: Make sure to follow the naming conventions in the Application Building guide that corresponds to your version of the IBM TRIRIGA Application Platform. Go to the PDF documentation page in IBM Knowledge Center, select your version of the IBM Application Building Guide from the drop-down, and click the Application Building for the IBM TRIRIGA Application Platform 3 link in the PDF table.

NEW: Naming Conventions starting in IBM TRIRIGA Application Platform 3.5.1 and higher

- [3.5.1] The new object revisioning and labeling features in IBM TRIRIGA Application Platform 3.5.1 offer a new benefit. When you install or upgrade to IBM TRIRIGA Application Platform 3.5.1, it is not necessary to rename the following high level as-shipped IBM TRIRIGA objects (for example, triBuilding to cstBuilding) when you modify them: Business Objects, Modules, Forms, Queries/Reports, UX metadata, and Workflows.

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Best Practices for Configuring and Upgrading IBM TRIRIGA Applications

- [3.5.2] In addition to the objects listed above, the following objects are also included in this new naming convention: Navigation collections, Navigation items, Portals, Portal sections, and Security groups.

- As explained in Tracking changes to objects and comparing object revisions, the changes that you make to these objects are now saved in revisions and tracked with object labeling. This best practice change applies only when you modify objects in the existing as-shipped IBM TRIRIGA applications that you are using.

- This change does not apply when you create new applications. When you create new applications or new objects in as-shipped applications, you should still follow the naming conventions in the Application Building guide that corresponds to your IBM TRIRIGA Application Platform version.

- For objects listed above that you previously renamed and modified, you should keep them renamed unless the modifications are easy for you to reapply to the as-shipped TRIRIGA objects after you upgrade to 3.5.1 or 3.5.2. Stay tuned for enhancements in future TRIRIGA releases.

B. If you make configuration changes to applications

- Meticulously document your configuration changes for each application so that at upgrade time, it is easier to compare your changes to the updates that the IBM has made to the applications.

- Review the Performance Considerations when Building or Updating Applications.

II. Reasons to upgrade your TRIRIGA applications

There are several key benefits to upgrading your TRIRIGA applications to the current version.

- Access new and updated capabilities.
- Enhance the user experience.
- Take advantage of application defect fixes while preserving the current application configurations.
- Keep up-to-date and retain support assistance.
- Maintain industry standards and best practices.
- Be prepared to take new Application releases in the future.

III. Best Practices - Preparing to upgrade your TRIRIGA applications

Whether or not you make configuration changes to TRIRIGA applications, you should prepare to upgrade them.

- Identify an experienced, certified TRIRIGA expert to be responsible for technical upgrade tasks. This person should have deep knowledge of and experience with TRIRIGA Object Migration and Application configuration. Contact IBM Global Business Services or a certified IBM Business Partner for technical best practices.

- Reach out to other TRIRIGA users for tips and lessons learned. Join user communities, LinkedIn groups, and forums and engage with other TRIRIGA customers to learn of their experiences with application configuration and upgrade. A few suggested places to start:
  - TRIRIGA Community LinkedIn group
  - IBM TRIRIGA LinkedIn group
  - Google triDeveloper user group
  - TRIRIGAFEEDIA blog and its list of user groups

- Review the IBM TRIRIGA Release Notes to evaluate the upgrade version and changes in features.

- Assess TRIRIGA patch helpers associated with an upgrade.

- Collect previous functional design documents that you or a Business Partner or IBM GBS might have created for past upgrades of your TRIRIGA applications.
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- Obtain all test scripts for existing applications that you or a Business Partner or IBM GBS might have developed for past TRIRIGA releases.
- Obtain the latest version of TRIRIGA Platform and Application software.

**New: [10.5.1 -> 10.5.2]** In addition to the high level best practices above, a new best practices guide is available for upgrading from 10.5.1 to 10.5.2 of the IBM TRIRIGA applications. See IBM TRIRIGA 10.5.1 to 10.5.2 Application Upgrade Best Practices.

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<td>07 Oct 2015</td>
<td>Minor aesthetic changes Added links for learning about as shipped TRIRIGA applications</td>
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<tr>
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<td>Minor changes. Fixed broken user communities links due to changed LinkedIn path. Synced PDF version with updated content on this page.</td>
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<td>Added new naming conventions starting in IBM TRIRIGA Application Platform 3.5.1</td>
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