# Best Practices Guide:

# Kurve Core

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## Supported Browsers

We support the following browsers:

- Chrome

- Safari

- Microsoft Edge

- Mozilla Firefox

We recommend using Chrome when using Kurve.


## Naming Conventions for Custom Fields in TRIRIGA

In order for Kurve to accurately determine the type of each data field in a TRIRIGA query, Kurve checks the two-letter suffix on each field name. We recommend following the standard TRIRIGA naming convention for field name suffixes in order to guarantee the expected behaviour when using these fields on Kurve records.

The TRIRIGA field types and the corresponding suffixes recognized by Kurve are:

- Text (TX)

- Number (NU)

- Date & Date Time (DA/DT)

- Color (CO)

If any of these 5 suffixes are on the field name, Kurve will automatically change the display type and filters for the column appropriately.

If a field does not have the appropriate suffix and the display type or filter options need to be changed, we recommend that a custom column be created with the same value as the desired column, and then the column type can be manually set.

Any field without a suffix or an unsupported data type will be treated as a text field in

Kurve.

## Nomenclature Practices

<u>Kurve Reports.</u>

Be as descriptive as possible to ensure you can distinguish between them. For example, if you have filtered the report on a specific column ensure you have that in the title, so you know when creating a graph that the report is filtered.

Example: "Leases in United States" if filtered for only leases in the United States

<u>Kurve Graphs</u>

Be as descriptive as possible to ensure you can distinguish between them. We recommend including your variables in the graph name and any filters you have.

For example, I would name a report "Capital Project: Budgets across United States" if I have a graph looking at the budgets of capital projects with a filter on United States.

<u>TRIRIGA Queries.</u>

We recommend using Tags for different user groups to ease finding queries when searching in Kurve.

Avoid using special characters and trailing spaces in the names of source queries, as it may cause Kurve to incorrectly detect that a query has no data.

We recommend establishing a naming convention for TRIRIGA queries or follow the naming convention your company is using already. For example, a query for could go be named: "cstBO - Kurve Source – Role of the Query"

## Improving Performance/Query Practices

For large datasets (>20000), we recommend setting up specific queries for each Kurve report/graph, with only the required columns, thus grouping data into more manageable sets. This reduces the memory needed by the TRIRIGA server and reduces load times.

We recommend that any filters that will always be in effect on reports/graphs should be set on the source query. Kurve filters are meant more for user manipulation and dynamic conditions (e.g. based on today's date).

We recommend using specific associations in your queries to help filter out duplicate line items between different BO's.  For example, if you are pulling in capital projects with budgets you have to use two modules, triProject and triPayment. There may be multiple associations between each line item and the project, resulting in duplicated rows. You can use a specific Association, such as "Has", to remove the duplicates.

Another example would be filtering for projects only associated to the logged in user.  Changing the data scope can allow you to filter through specific results.

Tjene is happy to schedule a query best practice session for all Kurve clients.

## OM Practices

Kurve Graphs and Kurve Reports can be OM'd through different environments with ease. You should always OM Kurve Graphs and Reports with their associated TRIRIGA Queries.

If you are pushing Kurve Graphs and Reports multiple times into the same environment, please ensure you delete the old one as the new one will not overwrite the old one.

## Sharing Practices

Kurve has sharing capabilities based off who you would like to see your work. All reports and graphs are set to private by default so that only the creator and admins can see the report. You should keep graph/reports that are works in progress as private.

If you would like everyone with security access to see your work, you can share it publicly.

If you would like a specific individual to see it, you can share it with individuals.

If you would like individuals in a specific security group, you can share it with these groups.

When graphs or reports are shared, others are able to make a copy and make changes as they see fit.

As a TRIRIGA or Kurve Admin, you will have the ability to edit other users graphs or reports.

## Deleting Kurve Graphs and Reports

If you accidentally delete a record, you can either undo immediately, or contact your admin who can restore the record for you.

## URL to Kurve

The link to Kurve is dynamic with their TRIRIGA link, for example:

[Your_Tririga_URLl]/p/web/Kurve

## Pinning your Favorite Records

Once users start creating Kurve reports and graphs, and sharing them with other users, it might get hard to find your favorites! We recommend pinning them on the Kurve dashboard for easy access.

## Creation of Kurve Records

Do not use any account without a profile record to create your Kurve visualizations.

For example, the "System" account. If you are using this account, the visualizations are able to be created, however, no user will be assigned, so your visualizations will disappear from the portal.

If you've already been creating these visualizations in this account, use the Kurve Admin Portal to reassign the records to a user.

## Security Groups

When loading Kurve, you will get three security groups in the package. See the following descriptions to determine what security group you should provide to your users. Please note, any user already in the "Admin Group" for TRIRIGA will automatically have Kurve Admin capabilities.

1. Kurve Admin: users with Kurve Admin will be able to view and edit all users Graphs and Reports. They will also have access to the Admin Portal in Kurve to manage all users' graphs and reports, restore records, and create/edit color templates. Admins can overwrite/save graph filters on any user's graph.

2. users with Kurve Access will be able to create their own graphs and reports as well as view and interact with other creations. They will not be able to edit other users' creations.

3. Kurve View Only: users with View Only will be able to view and interact with other Kurve Graphs or Reports. They will not have access to create their own or create copies of others.

## Filtering

### Number Filters

Be careful when filtering on number columns. If you have re-formatted the number column, you will still need to filter on the original value in order to properly filter.