TURNOVER® FOR ISERIES

Getting Started with TURNOVER® for iSeries Client

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- Getting Started with TURNOVER® for iSeries Client
- Getting Started with TURNOVER® for iSeries
- TURNOVER® for iSeries User Guide
- TURNOVER® for iSeries Developer's Guide
- Application Planning Guide
- Managing IFS Objects with TURNOVER® for iSeries
- TURNOVER® for iSeries PWM Quick Reference
- Synchronizer User Guide

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TURNOVER® for iSeries

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PREFACE

Thank you for choosing TURNOVER® for iSeries!

ABOUT THIS DOCUMENT

This document guides you through the installation of the software for TURNOVER® for iSeries' client user interface. It describes the basic steps you must take to begin using the client.

WHAT'S IN THIS DOCUMENT

Installation instructions

The installation instructions are intended for System Administrators or other people authorized to manage network resources and install programs on your company's computer systems and networks.

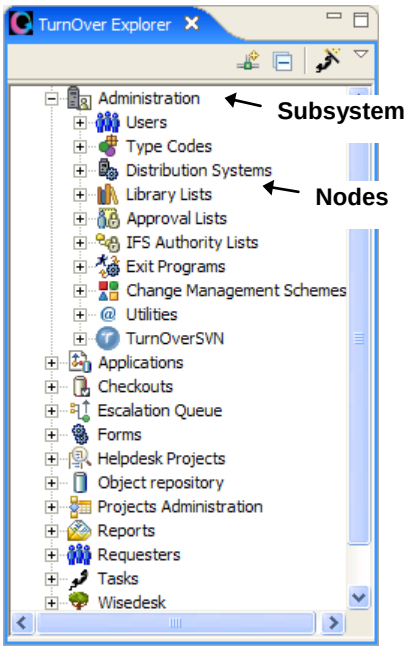
Getting started and configuration information

The information in the ***Getting Started*** and ***Configuring Client Features*** chapters is intended for end users who are ready to set up and use the installed software.

OVERVIEW

The TURNOVER® for iSeries Client consists of several **components**. Components are sets of related features that are bundled together. The TURNOVER® for iSeries components are:

- Administration
- Development
- Forms
- Helpdesk
- Projects Administration
- Reports
- Tasks



A TURNOVER® for iSeries component might have one or more subsets called **subsystems** associated with it. For example, the Administration component has the Administration and Applications subsystems. The Developer component has the Checkouts, Worklists, and Object Repository subsystems.

A subsystem might have several **nodes** beneath it that categorize the TURNOVER® for iSeries items you can work with using that subsystem.

When installed as a client, TURNOVER® for iSeries presents itself to you in a collection of views called the TURNOVER® for iSeries perspective. The main view in the TURNOVER® for iSeries perspective is the TURNOVER® for iSeries Explorer view, shown above. This view is often called simply "TurnOver Explorer."

If a TURNOVER® for iSeries component is installed, then its subsystems are visible in TURNOVER® for iSeries Explorer. Subsystems appear in alphabetical order in TURNOVER® for iSeries Explorer, regardless of which component they belong to.

For a summary of the subsystems that belong to each component, refer to the table on page 3-1.

CHAPTER 1: INSTALLING OR UPDATING TURNOVER® FOR ISERIES' CLIENT SOFTWARE

Follow these instructions to install the TURNOVER® for iSeries client software on a client PC.

UNDERSTAND THE PREREQUISITES, ASSUMPTIONS, AND REQUIREMENTS

- **Server requirements.** You must be running TURNOVER® for iSeries dated January 2010 or later on your IBM i system.
- **Client requirements.** TURNOVER® for iSeries' client components can be installed into any Eclipse-based Integrated Development Environment (IDE) or into TURNOVER® for iSeries' own standalone client.

  The following minimum PC system requirements must be met:

  - 300 MB of free space for TURNOVER® for iSeries Client plug-in installation
  - Microsoft® Windows® XP with SP2 or higher
  - Intel® 1GHz processor minimum (higher is recommended), Minimum 1 GB RAM (2 GB RAM recommended)
  - Monitor: 1024 x 768 resolution minimum using 256 colors (or higher for best results)
  - Mouse or compatible pointing device

  If you plan to run TURNOVER® for iSeries in an IDE such as IBM's RDi, then that software must already be installed on your computer before you proceed. For current product compatibility information please refer to the Compatibility Chart on our customer support site at:

  https://support.softlanding.com/Home/Compatibility.aspx

- **Online help.** An online help system called **TurnOver** is shipped with the client software and is automatically installed into the help Table of Contents. To access it, choose **Help Contents** on the **Help** menu after installing and starting your software.

VERIFY THAT THE CORRECT TURNOVER® FOR ISERIES RELEASE IS INSTALLED ON YOUR IBM I

If you are an IBM i System Administrator, the **T*nnn*INST.zip software zip file** (where *nnn* is the product version number) contains IBM i installers for TURNOVER® for iSeries (dated January 2010 or later). The ***Getting Started with TURNOVER® for iSeries*** guide contains accompanying detailed instructions for first-time installs, upgrading, or applying cumulative changes on the IBM i system that functions as your TURNOVER® for iSeries server.

If you are an IBM i System Administrator, verify that the correct version of TURNOVER® for iSeries is installed on your IBM i server[1]. If you are not an IBM i System Administrator, verify with that person that the correct version of TURNOVER® for iSeries is installed on your IBM i server. Once verified that the correct version of TURNOVER® for iSeries is installed on your IBM i server, then return to this document and proceed with installing your TURNOVER® for iSeries client software.

[1] To verify your TURNOVER® for iSeries server version, use TURNOVER® for iSeries Main Menu option 8, then option 6. The client equivalent is Administration ▸ Utilities ▸ TURNOVER® for iSeries Version/Install History

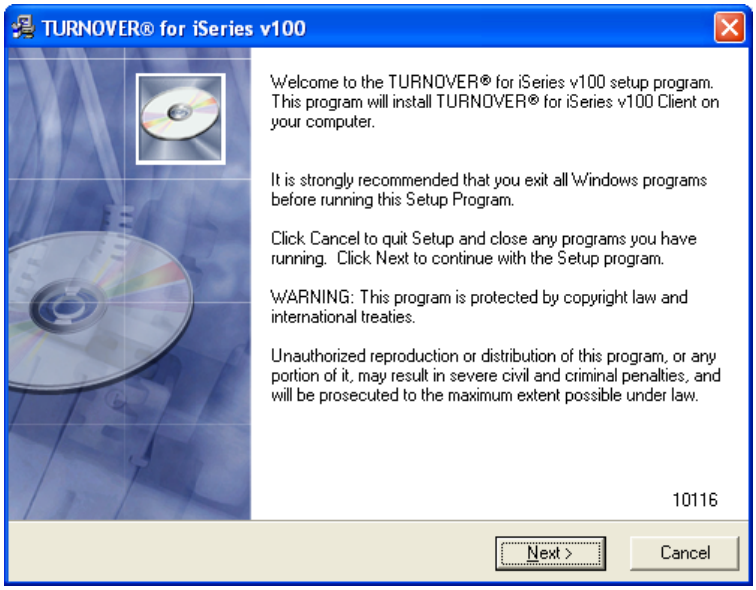
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INSTALL THE CLIENT SOFTWARE FOR THE FIRST TIME

Follow these instructions if the client software is NOT already installed on this computer. If the software is installed and you want to apply updates or add components, follow the instructions on page 1-8.

Before you begin, you should know whether you will be installing TURNOVER® for iSeries into an already-installed IDE, OR installing the standalone TURNOVER® for iSeries client, OR both.

1. Sign onto the PC as a user with administrative rights.[2]
2. Close any programs that are running, and disable your antivirus software.
3. Unzip contents of the **TurnOverDocsClients.zip** file on to the hard drive of the PC computer where you plan to install the software.
4. Locate and double-click on the **index.htm** file in the root directory of the extracted file structure.
5. Click the blue **TURNOVER® for iSeries Client** button.
6. Click the link for installing TURNOVER® for iSeries Client at the bottom of the **Installing TURNOVER® for iSeries** page.



Windows 7 Users: If you are running Windows 7 or higher you need to run this installer while signed on as an administrator AND by using the 'Run as Administrator' option. Use the ‘right click this link’ link and select 'copy link address', then paste the copied link into Windows Explorer (NOT Internet Explorer!). Once there right click the T*nnn*Client.exe installer (where *nnn* is the product version number) and select 'Run as Administrator'.

The first TURNOVER® for iSeries Client installation panel appears.

Click **Next**.

[2] You cannot successfully install this software on a PC client without administrative rights. If you are signed on as a user that does not have administrative rights, the installer issues a message and you cannot proceed.

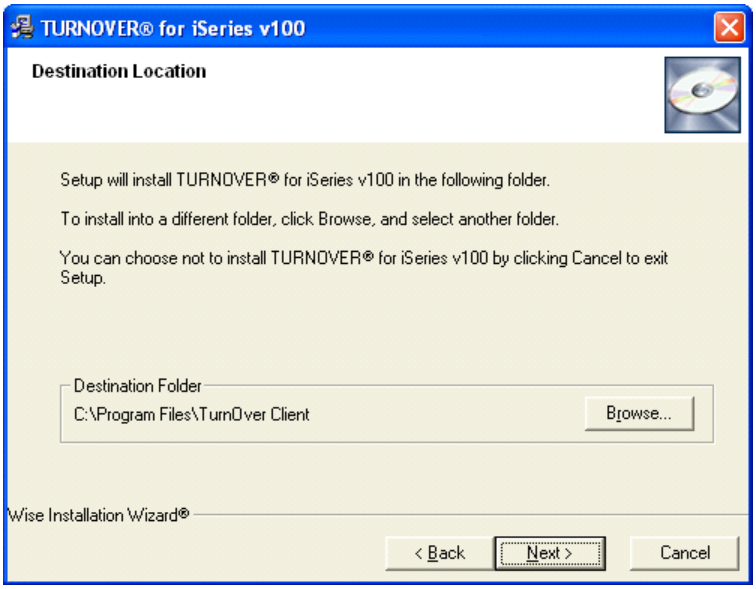
At this point, if you are not signed on as a user with Administrative rights, you are notified and the installer ends. If you are signed on with Administrative rights, the installer checks your system for existing TURNOVER® for iSeries components.

7. If components are found, then this is not a new install. Proceed with the instructions for upgrading or re-installing on page 1-8.

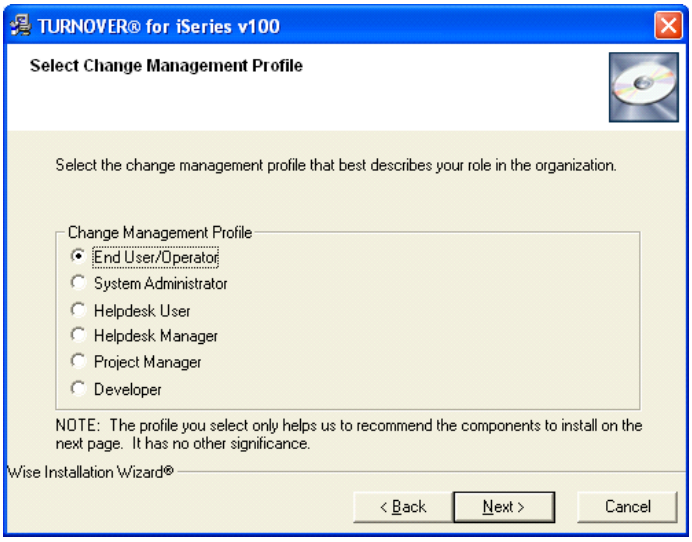
8. If no components are found, or if you are re-installing or adding components, the **Destination Location** panel appears showing the default install location for the software:

   If desired, change the install location using the **Browse...** button.

When you are satisfied with the install location, click **Next**.



9. On the **Select Change Management Profile** panel, choose the profile that most closely matches the end user's role in the development organization.



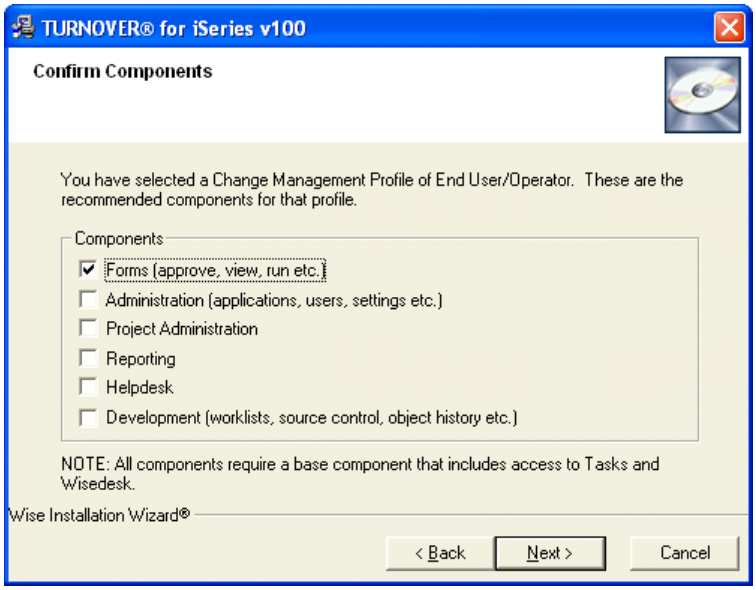
Each role profile has a set of one or more recommended TURNOVER® for iSeries client components associated with it. These are presented on the next page, where you have the option of including or excluding components, as appropriate.

Click **Next**.

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10. On the **Confirm Components** panel, the typical set of components associated with the role profile you chose are presented.

The installer installs ONLY the items you check on this page. Therefore, when adding components make sure you select ALL the components you want – those you already have, as well as those you want to add.



To include additional components, check them.

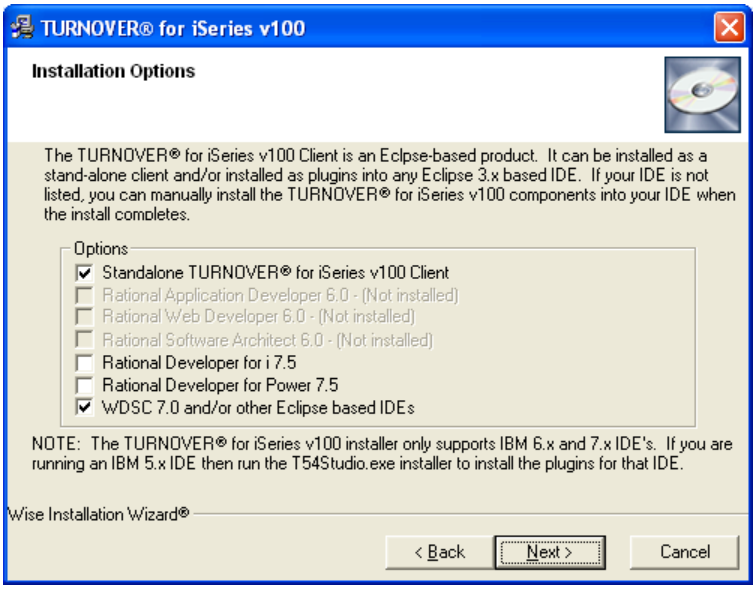
To exclude a component you don't want, remove its check mark.

All components include access to Tasks and Wisedesk.

When the mix of selected components matches your requirements, click **Next**.

11. On the **Installation Options** panel, indicate where you want the components installed.

Developers working in an Eclipse-based tool such as IBM's RDi will want the components installed into their IDE.



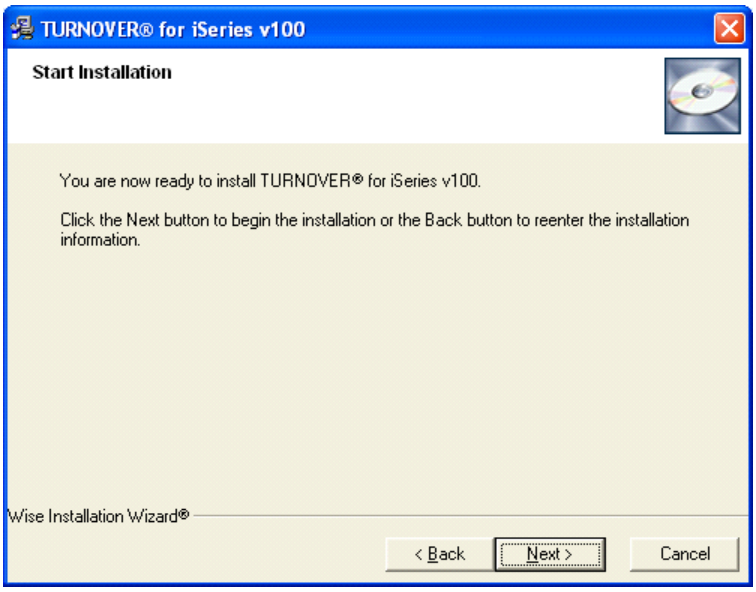
Non-developers will want their components installed in the standalone TURNOVER® for iSeries client.

The installer detects eligible software on your computer, and lists the options it finds here. Set the check marks to match where you want TURNOVER® for iSeries components installed.

You can install your TURNOVER® for iSeries components into more than one IDE, and you can run the TURNOVER® for iSeries standalone client at the same time. However, you cannot install a different mix of components into each

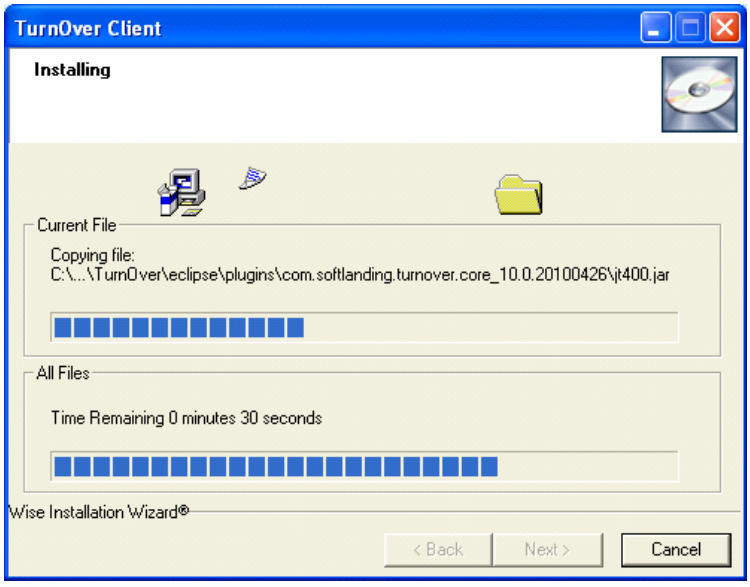
location – the component set for all locations will be the same, and updates applied take effect in all locations.

12. On the **Start Installation** panel, use the **Back** button to return to a previous screen to view or make corrections, or you can click **Next** to proceed.



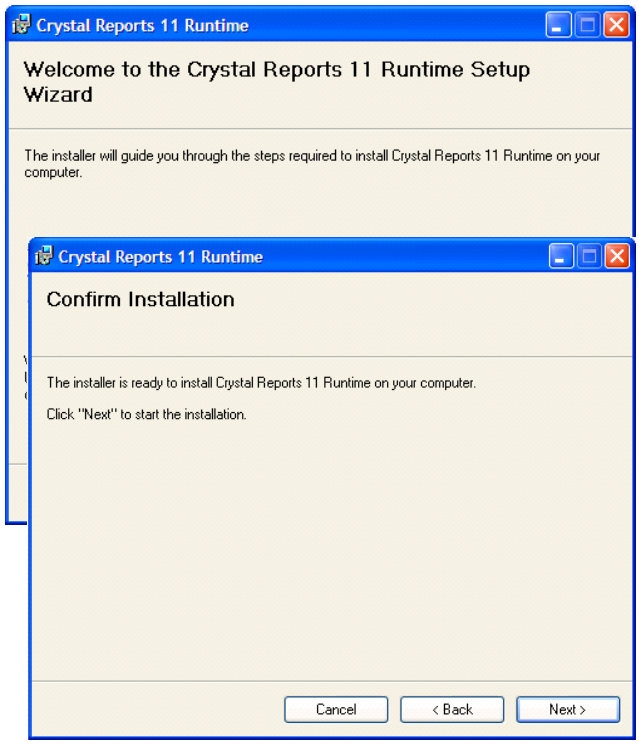
When you are ready, click **Next**.

13. A progress meter appears showing you the status of your request.



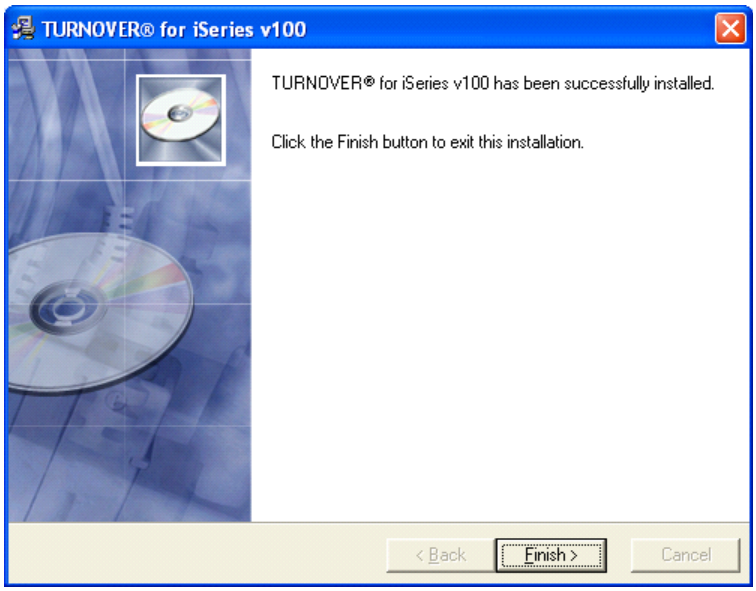
If you did not choose to install TURNOVER® for iSeries' Reporting component, proceed with step 15.

14. If you chose the Reporting component and you do not already have the Crystal Reports 11 Runtime software on this computer, then that software is also automatically installed.



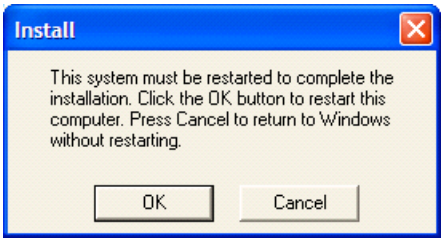
Click **Next** twice to proceed.

15. When the entire installation completes, a confirmation panel appears:



Click **Finish**.

16. Under some circumstances, the computer must be restarted when the installer ends. Click **OK** to restart your computer.

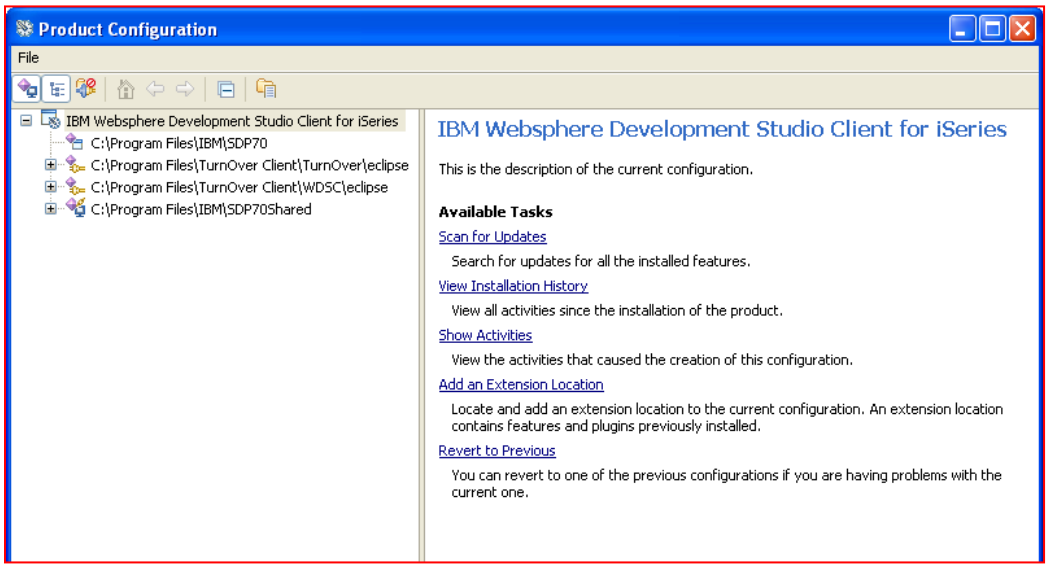


TURNOVER® for iSeries Client software is now installed and ready for configuring.

The next step is to create system connections, so you can use the client software you have installed. Proceed with the next chapter, ***Getting Started***, on page 2-1.

COMPLETE THE INSTALLATION MANUALLY (ECLIPSE-BASED IDE USERS ONLY)

If you chose the **WDSC 7.5 or other Eclipse-based IDE** option on the Installation Options page of the install wizard, then you must complete the install manually for each IDE where you want your TURNOVER® for iSeries plug-ins to run. The README file that appears after the Crystal Reports Runtime installation contains complete instructions; for your convenience we will repeat those instructions here.



Create an Extension Location for the TURNOVER® for iSeries Client plugins

To manually complete the installation on WDSC 7.5+ or other Eclipse-based IDEs, you must create an Eclipse Extension Location to define the base TURNOVER® for iSeries plug-in set.

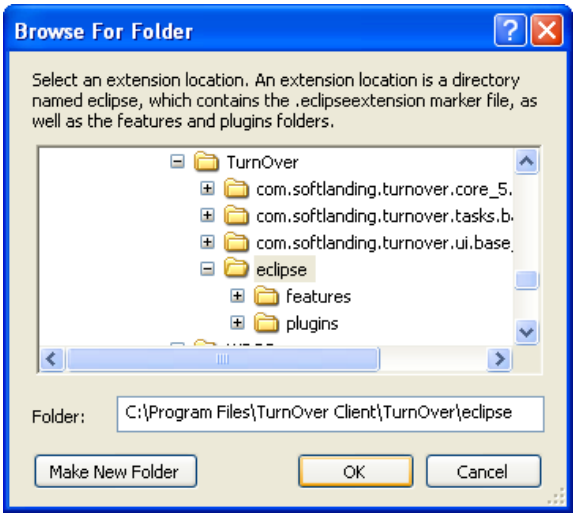
1. Start your IDE and go to: **Help -> Software Updates -> Manage Configuration**

2. Select the **Add an Extension Location** option.

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3. Select the appropriate location based on where you installed the TURNOVER® for iSeries plug-ins. If you accepted the default install location for the base TURNOVER® for iSeries plug-ins, the path is:

```
C:\Program Files\TurnOver
Client\TurnOver\eclipse
```



Your IDE may then require a restart for the plug-ins to become available. (You can wait to restart the IDE until you have created the Extension Location for the plug-ins subset needed by IDEs that include the RSE integration, if applicable. See the next topic.)

Create an Extension Location for the subset of plug-ins used by the RSE integration

Any Eclipse-based IDE that includes the RSE (such as WDSC 7.5+) requires an additional Extension Location for the subset of plug-ins used by the RSE integration.



Using the instructions above as a guide, create a second Extension Location that specifies the appropriate location for the RSE plug-in subset, based on where you installed the TURNOVER® for iSeries plug-ins. If you accepted the default installation location, the path for the RSE-specific plug-in subset is:

```
C:\Program Files\TurnOver
Client\WDSC\eclipse
```

Close and restart your IDE to allow the changes to take effect.

UPGRADE OR RE-INSTALL EXISTING COMPONENTS

Regular cumulative updates of the TURNOVER® for iSeries software are available for download from the SoftLanding support site (http://support.softlanding.com).

Occasionally, mid-version client-only fixes might be published on the TURNOVER® for iSeries client's update site for delivery to your Eclipse-based product's Update Manager. You can locate and install mid-version fixes either manually or automatically, using the Update Manager features provided by the TURNOVER® for iSeries client or your IDE. The Update Manager shows you only those updates that apply to the quarterly version you are running.

You can upgrade from one cumulative version of the client software to another ONLY by running the **T*nnn*client.exe** installer (where *nnn* is the product version number). **You must ensure that your IBM i server has also been updated to the same level.**

Applying a cumulative update

To apply a cumulative update to your existing TURNOVER® for iSeries client software, copy the **TurnOverDocsClients.zip** file to the hard drive of the PC computer where you plan to carry out the update and unzip the contents.

Remember!

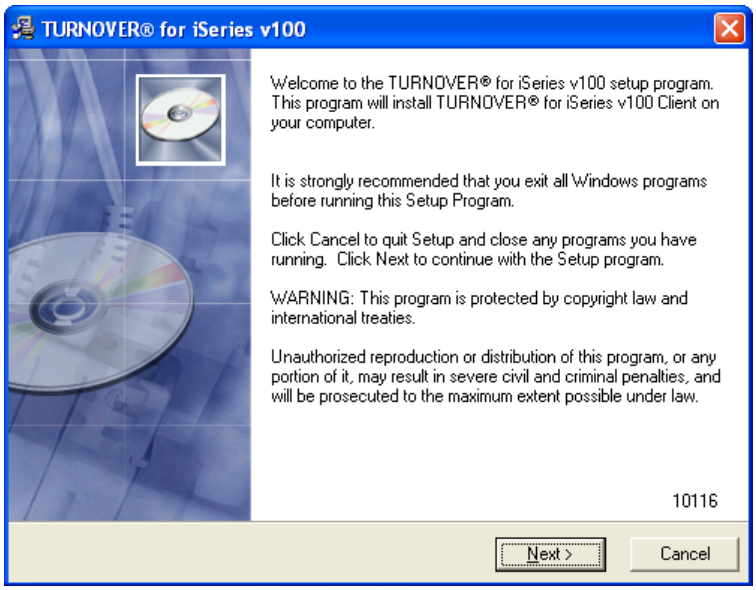
Your IBM i server ***must*** be running the same version as your clients.

1. Locate and double-click the **index.htm** file in the root directory of the extracted file structure.

2. Click the blue **TURNOVER® for iSeries Client** button.

3. Click the link for installing TurnOver Client at the bottom of the **Installing TURNOVER® for iSeries Client** page.

   Windows 7 Users: If you are running Windows 7 or higher you need to run this installer while signed on as an administrator AND by using the 'Run as Administrator' option. Use the 'right click this link' link and select 'copy link address', then paste the copied link into Windows Explorer (NOT Internet Explorer!). Once there right click the T*nnn*Client.exe installer (where *nnn* is the product version number) and select 'Run as Administrator'.

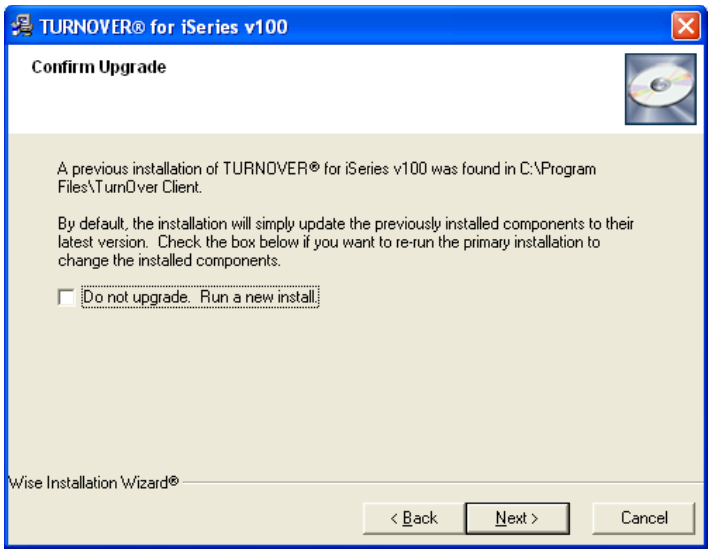


   The first TURNOVER® for iSeries Client installation panel appears. Click **Next**.

At this point if you are not signed on with administrative rights, you are notified and the installer ends. If you are signed on with Administrative rights, the installer proceeds by checking your system for existing components.

4. Upon locating existing components, the installer requests confirmation.

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To re-run the installer or add additional components, check the box labeled **Do not upgrade. Run a new install** and then click **Next**.

You might re-run the installer to add components that were not previously installed – for example, if your role in the company changes.

To update your existing components without re-installing or adding any additional components, accept the defaults (the check box is blank by default) and click **Next** to proceed.

In this case, the install proceeds as a new install. Go to step 8 on page 1-4.

Your existing client software will be updated to the latest version.

UNICOM Systems, Inc. Recommends

If you are installing TURNOVER® for iSeries into an Eclipse-based product, we recommend checking the TURNOVER® for iSeries update site using the Update Manager after upgrading to the latest version, in case any updates have been published.

CHAPTER 2: GETTING STARTED

This section provides the information you need to connect to TURNOVER® for iSeries on your IBM i server. Once you have done this, you can configure the software and begin using it.

We recommend that you refer to the online help for detailed information about your TURNOVER® for iSeries software. To open the online help, choose **Help ► Help Contents** on the menu bar, and then click **TurnOver** in the left pane. The Welcome page for the TURNOVER® for iSeries online help system appears.

Initially, to use the software, you need to define one or more connections, depending on whether you are using TURNOVER® for iSeries in IBM's RDi product or not:

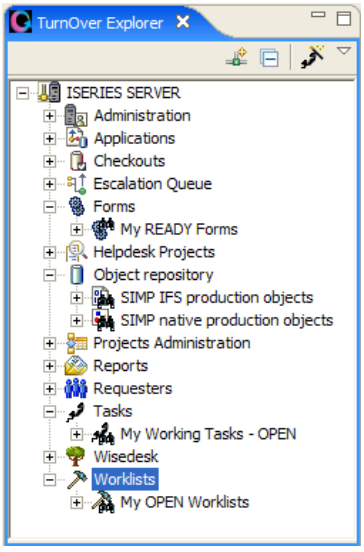
Operating environment	TURNOVER® for iSeries Connection in TURNOVER® for iSeries perspective	IBM i connection in Remote System Explorer perspective
Rational Application Developer alone	Yes	No
Rational Site Developer alone	Yes	No
Either of the above with RDi	Yes	Yes
TURNOVER® for iSeries Client	Yes	No

Once you've determined which connections you need and have created them, you'll want to define filters that show just the TURNOVER® for iSeries tasks, worklists, forms, and so forth, that are of interest to you.

For example, you may only want to see the tasks that are currently assigned to you, the worklists associated with tasks that are not yet completed, forms eligible to run that are associated with your programmer name, and so forth.

Experiment with filters - you can define as many as you want. The idea is to customize your view so you can work as efficiently as possible.

This example shows the **Forms**, **Object Repository**, **Tasks**, and **Worklists** subsystems appearing in TurnOver Explorer with some filters defined.



CONNECTING TO A REMOTE SYSTEM

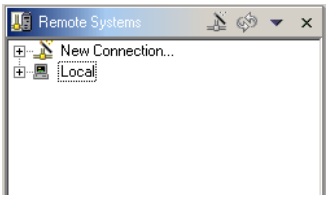
If you plan to use TURNOVER® for iSeries with RDi's native IBM i development tools, then you must create a connection to the remote IBM i computer that contains, or that will contain, the native IBM i programs you're planning to write or change. Once this system is defined, you can view information about its contents. By right clicking on an IBM i object while browsing the contents of a library on this system, you can easily add it to a TURNOVER® for iSeries worklist.

IF YOU ARE NOT USING RDI, YOU CAN SKIP THIS STEP.
GO TO

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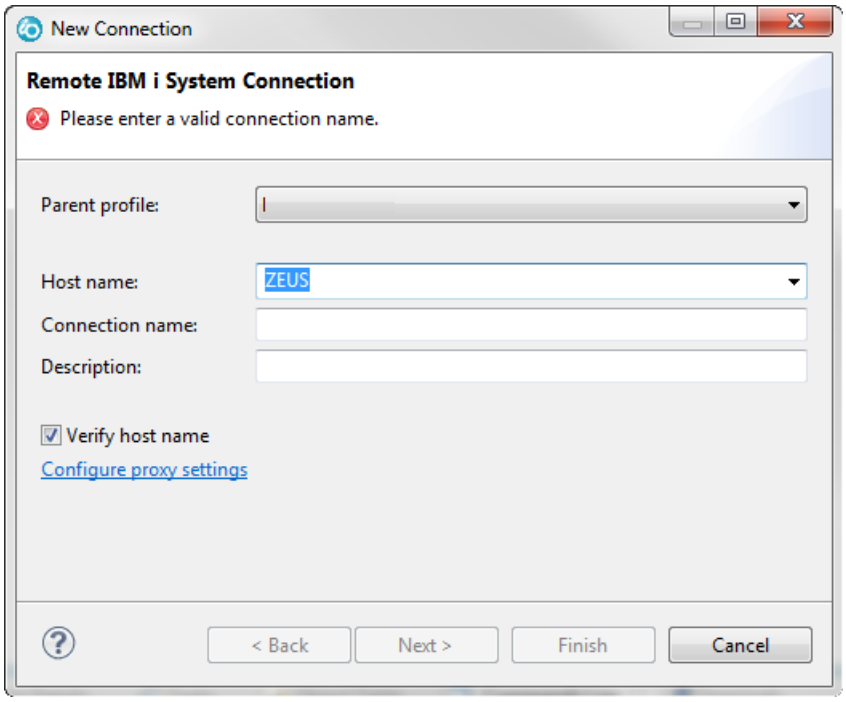
Connecting to TURNOVER® for iSeries on page 2-4 instead.

Follow these instructions to define a connection to a remote IBM i system where you plan to do native IBM i object development.



1. Open the **Remote System Explorer** perspective. The **Remote Systems** view in this perspective looks something like this at first:

2. Expand **New Connection...** (by clicking its plus sign). Then expand **IBM i...** A panel like this appears:



Supply a parent profile name, a connection name, a system type of IBM i, and a host name or IP address, as follows:[3]

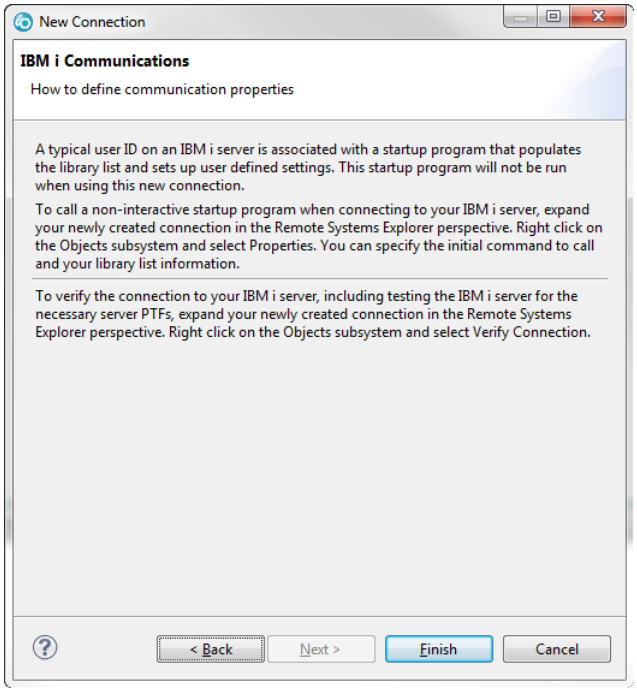
The parent profile can be an individual profile, as shown here, or you can use the Team profile.

Read the online help in your IDE for more about individual versus team profiles.

Click **Next**.

[3] A description is optional. If you supply a description, it appears when you view properties for the connection.

3. The IBM i Communications page explains how you tell your new connection to call a startup program to set up the library list and establish user-defined settings for this remote system. Click **Finish** to complete the connection.



Your new connection now appears in the **Remote Systems** view.

Next, you should create a TURNOVER® for iSeries connection, as described in the following topic.

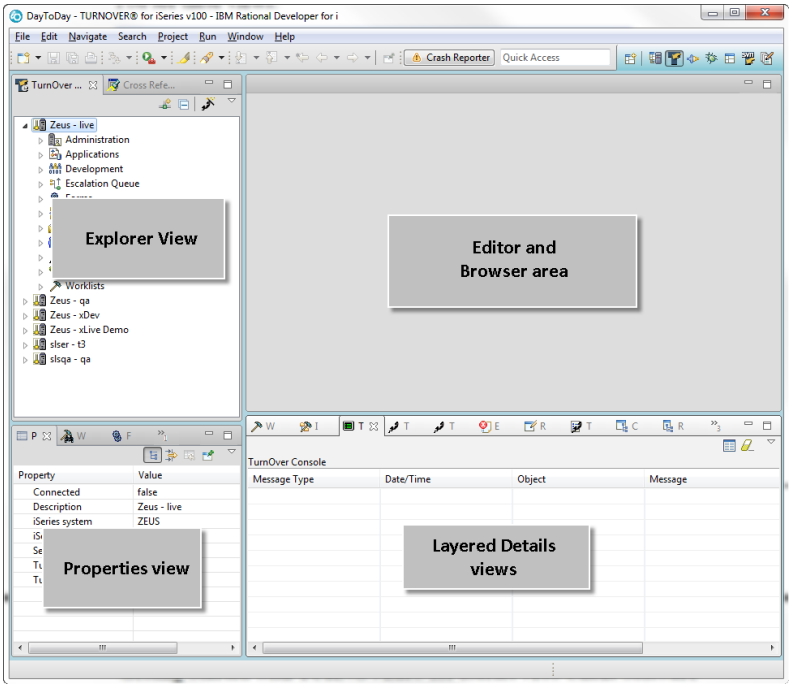
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CONNECTING TO TURNOVER® FOR ISERIES

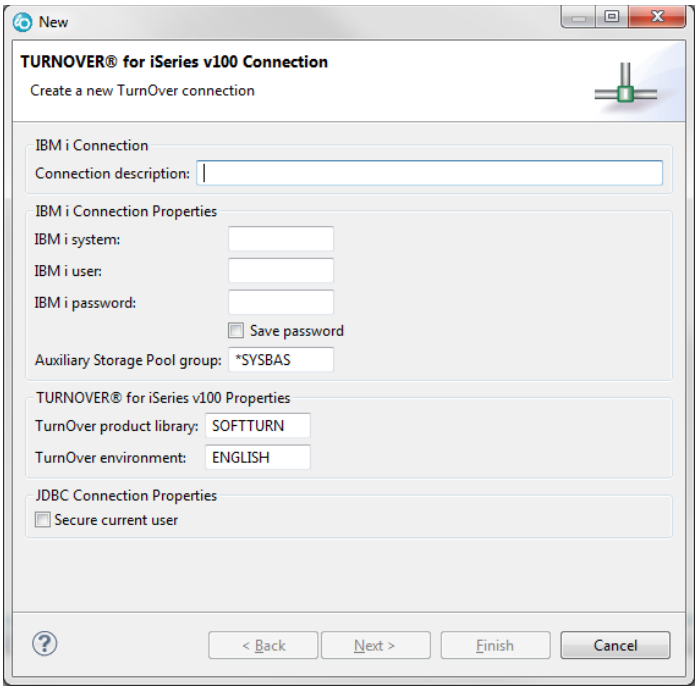
You create a TURNOVER® for iSeries connection in the TURNOVER® for iSeries Explorer view of the TURNOVER® for iSeries perspective.

1. On the menu bar, choose **Window ► Open Perspective ► Other... ► TURNOVER® for iSeries**.

   You see these views:



2. Click the **New Connection** toolbar button .



3. On the **New TurnOver Connection** panel, supply a connection description along with connection information for both TURNOVER® for iSeries and the IBM i system where it is installed.

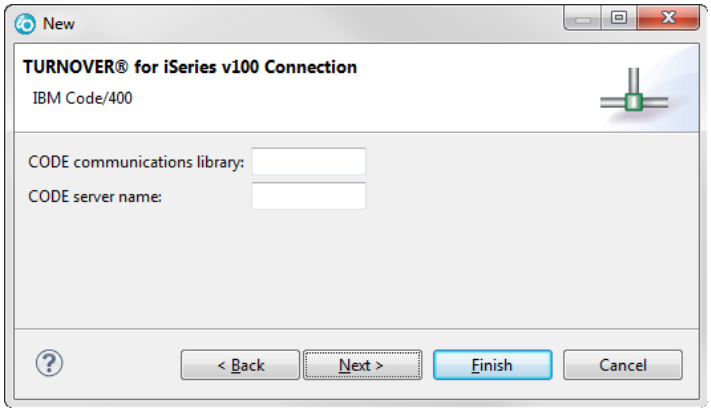
   NOTE: If your TURNOVER® for iSeries product is installed into an iASP, be sure to specify the auxiliary storage pool group here. Also, be sure that there is a Relational database Entry for the iASP. Use WRKRDBDIRE to verify before you try to connect to that system.

   Click **Next**.

4. The **IBM Code/400** page appears only if you have installed your TURNOVER® for iSeries components into the RDi IDE.

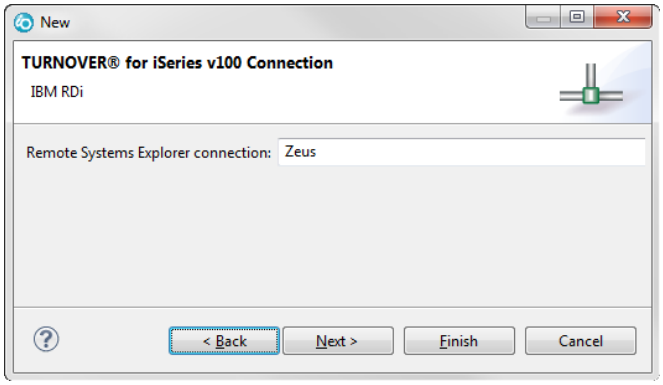
When you're editing source from within the TURNOVER® for iSeries Perspective, you can use either the CODE/400 editor or the LPEX editor. The LPEX editor is built in; CODE/400 requires configuration. (The instructions on page 3-4 explain how to configure for CODE/400.)

For now, skip this page; click **Next**.



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5. The **IBM RDi** page appears only if you have installed your TURNOVER® for iSeries components into the RDi IDE.



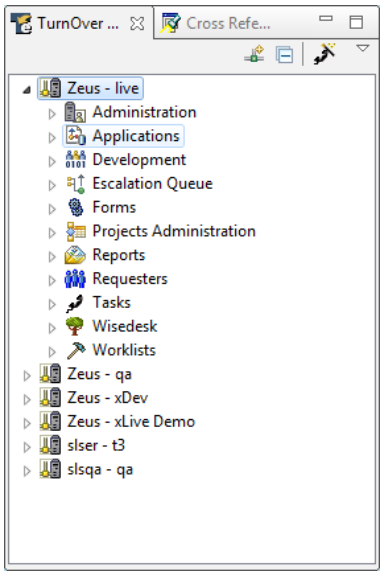
If you created an IBM i connection in the previous topic, choose that connection for your IBM i server, and click **Next**.

Otherwise, skip this page and click **Next**.

6. Click **Finish** to complete the connection.

Your new TURNOVER® for iSeries connection now appears in the **TurnOver Explorer** view. The items that appear under the connection name are called **subsystems**. The items that appear beneath a subsystem when you expand it are called **nodes**.

To view the TURNOVER® for iSeries subsystems available in your connection, expand the connection by clicking its plus sign.



This example shows all TURNOVER® for iSeries subsystems installed.

Most installations will include a subset of these.

Managing Your TURNOVER® for iSeries Connections

There may be instances when you need to change or even delete the connection you've defined. The following sections explain how to do so.

Changing a connection

To change the properties for an existing TURNOVER® for iSeries connection:

1. In **TurnOver Explorer** view, right click the connection  you want to change.
2. Choose **Properties**.

   A panel appears that is identical to the panel for creating a connection. You can change the connection description, the IBM i connection properties (IBM i system and IBM i User ID and password), and the TURNOVER® for iSeries product library and TURNOVER® for iSeries environment.
3. When you finish your changes, click **OK**.

   TURNOVER® for iSeries updates the connection.

Deleting a connection

To delete an existing TURNOVER® for iSeries connection:

1. In **TurnOver Explorer** view, click the connection  you want to delete.
2. Right-click and choose **Delete connection**.
3. On the confirmation panel that appears, click **Yes** to delete the connection; click **No** to cancel the deletion.

   Note: When you click **Yes**, TURNOVER® for iSeries immediately deletes the connection. Any filters associated with the deleted connection are removed as well, providing they are not shared with other connections.

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Managing Filters for Your TURNOVER® for iSeries Data

Using filters, you identify the TURNOVER® for iSeries data you want to work with in your TURNOVER® for iSeries Perspective. You can apply filters to the following TURNOVER® for iSeries components:

- **Checkouts**
- **Forms**
- **Object Repository**
- **Tasks**
- **Worklists**

Once you create a filter, you can change, delete, and refresh it.

Note: Some TURNOVER® for iSeries filters are pre-defined. These filters cannot be deleted, but some, such as the **Filter Tasks by Priority** filter in Helpdesk, might allow you to specify different values.

Notes about filter criteria

- You can use either the % or * characters interchangeably as single- or multiple-character wildcards in your filters.
- For example, to select all forms that have a form status beginning with RAN, use a Form Status filter value of RAN%.
- A filter value containing all blanks selects all values (nothing is omitted).

UNICOM Systems, Inc. Recommends

Be sure to specify some selection criteria in your Object Repository filters before you click **Finish**!

Otherwise, your filter will attempt to resolve all libraries and all objects previously promoted by TURNOVER® for iSeries, which could take a substantial amount of time if your TURNOVER® for iSeries object history database is large.

This may be true of other kinds of TURNOVER® for iSeries filters as well.

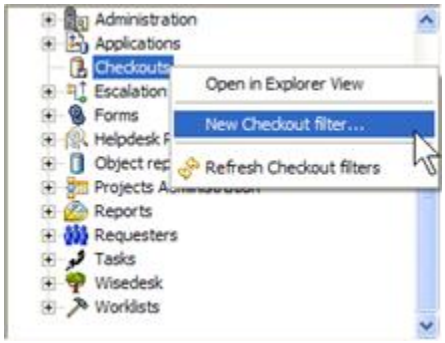
Creating a filter

To create a filter:

1. In the **TurnOver Explorer** view, choose with the right mouse button the TURNOVER® for iSeries component for which you want to create a filter.

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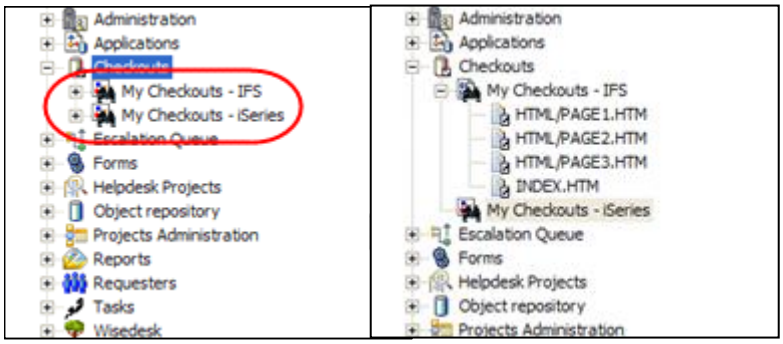
2. On the context menu, choose the **New filter** option.



   A panel appears on which you define your filter, providing a name, as well as criteria that define the data you want to include in the results view (worklists, forms, tasks, or objects – depending on the filter you are creating).

3. When you finish supplying the filter information, click **Finish**.

   Now, when you expand the TURNOVER® for iSeries subsystem for which you created a filter, a list showing all existing filters appears. When you then expand a filter, you see a list of items that meet the filtering criteria you specified. (If you don't see any information, check your filter criteria to be sure they match existing data in your TURNOVER® for iSeries database.)



☚ This example shows two **Checkouts** filters.

☛ When you expand the My Checkouts – IFS filter, you see a list of checked out objects that match your filter criteria:

Filter icons are the component icon, overlaid – or "decorated" – with a pair of binoculars:

This icon …	Indicates …
	A filtered list of worklists.
	A filtered list of forms.
	A filtered list of tasks.
	A filtered list of objects in the object repository.
	A filtered list of members in the object repository.
	A filtered list of IFS objects in the object repository.
	A filtered list of checked out (or checked in) objects.

Changing a filter

You can change the settings of existing filters.

To change a filter:

1. In **TurnOver Explorer** view, right click the filter (see below) you want to change, and choose **Change filter**.
2. A panel appears showing the current filter settings. Change the criteria to see different TURNOVER® for iSeries data.
3. Click **OK**.

   TURNOVER® for iSeries immediately updates the TURNOVER® for iSeries data appearing in the filtered list.

Refreshing a filter

When you change a filter definition, the affected data is automatically refreshed. However, if someone else changes a qualifying item after you've opened your filter (such as a task) you'll need to manually refresh your task filter to see the changes.

To refresh a filter:

1. In the **TurnOver Explorer** view, right click the filter you want to refresh.
2. Choose **Refresh filter**.

Deleting a filter

You can delete any existing filter.

To delete a filter:

1. In **TurnOver Explorer** view, click the filter you want to delete.
2. Right-click and choose **Delete filter**.
3. On the confirmation panel that appears, click **Yes** to delete the filter; click **No** to cancel your request.

   Note: When you click **Yes**, TURNOVER® for iSeries immediately deletes the filter from all TURNOVER® for iSeries connections that use it, and excludes from the **TurnOver Explorer** view any TURNOVER® for iSeries data associated with that filter.

Viewing filtered data in a table

TURNOVER® for iSeries can present filtered information in tabular form. Doing so provides you with additional information about forms, tasks, and checkouts/check-ins.

For instance, when you view filtered tasks in a table, you also see the associated resource, priority, and status information. When you view filtered forms in a table, you also see the associated application, task ID, programmer, and run date.

To view filtered information in table format:

1. In **TurnOver Explorer** view, right click the filter whose results you want to present in a table.
2. Right click and choose the appropriate **Filter Details View** option for the filter you chose.

The filtered information appears in a table view.

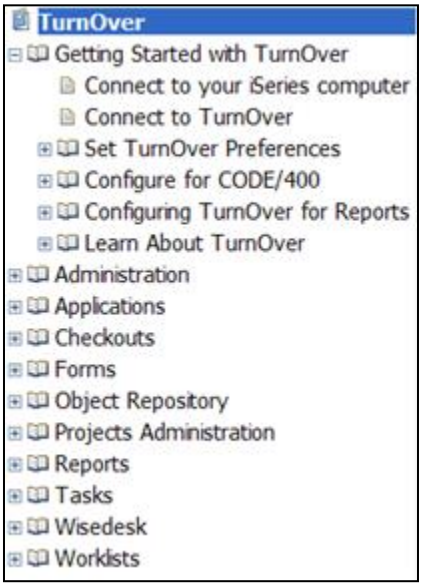
USING THE ONLINE HELP

Most of the information about TURNOVER® for iSeries' client user interface is in the form of online help, and is available after you have installed the product.

In the TURNOVER® for iSeries client or your IDE, locate the **Help** menu. Choose **Help Contents**. Then choose the **TurnOver** link in the help Table of Contents.

This is an example how the TURNOVER® for iSeries help system looks in the Help Table of Contents.

As you can see, each TURNOVER® for iSeries subsystem has its own book. To see the topics for a book, expand the book.



CHAPTER 3: CONFIGURING CLIENT FEATURES

Some features in the TURNOVER® for iSeries client software require configuration before you can use them to achieve results you expect.

In most cases, TURNOVER® for iSeries' default settings are adequate. However, some TURNOVER® for iSeries components have preference settings that should be reviewed before you use the software for the first time.

In addition, the TURNOVER® for iSeries Reports, TURNOVER® for SVN version control for multi-platform development, and the optional CODE/400 support for IBM i development features all require configuration before first use.

What you configure depends on what you've installed. Use this table to help you decide which configuration topics apply to you:

Component Subsystem(s)	**Description**	**What to review or configure**
Administration Administration, Applications	There are no specific preference settings or setup requirements needed to begin using TURNOVER® for iSeries' Administration features; however, you should review Administration preferences. The Application Designer uses color to convey information about application definition settings. In addition, certain build jobs are submitted on hold by default. You may want to adjust these settings to meet your needs.	**Administration Preferences –** See page 3-3.
Development Development (contains Checkouts, Object Repository, and Synchronizer), Worklists, Version Control	**Multi-platform developers** who are using TURNOVER® for iSeries will want to use TURNOVER® for iSeries' version control product, TURNOVER® for SVN, which is automatically installed when you choose the Development component.	• **Developer, Forms, and Tasks Preferences –** See page 3-3. • **Setting up TURNOVER® for SVN**[4] **–** See page 3-7.
	IBM i developers can use CODE/400's source editor or screen designer support instead of the built-in LPEX support.	• **TURNOVER® for iSeries, Developer, Forms, and Tasks Preferences –** See page 3-3. • **Setting Up CODE/400 Support (optional, RDi only) –** See page 3-4.

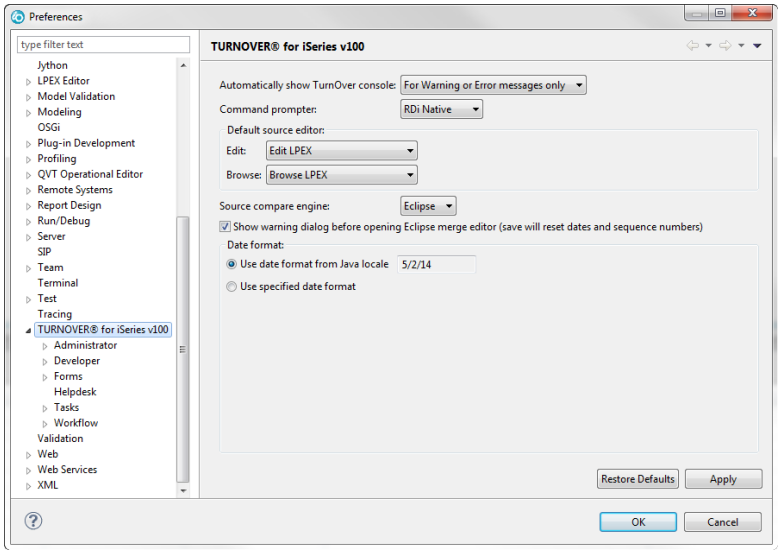
[4] Your IBM i Administrator must plan and implement TURNOVER® for iSeries SVN on your system before you can follow the instructions in this document. If necessary, provide that person with ***TURNOVER® for iSeries Supplement #66: Planning and Implementing TURNOVER® for iSeries SVN***.

Component Subsystem(s)	**Description**	**What to review or configure**
Forms Forms	There are no specific setup requirements for Forms; however, you should review the Forms and Tasks preference pages.	**Forms and Tasks Preferences –** See page 3-3.
Helpdesk Helpdesk Projects, Requesters, Escalation Queue	Helpdesk users should define a default Helpdesk project and phone dialing options. Do this in Helpdesk preferences. You should also review your Tasks preferences.	**Helpdesk and Tasks Preferences –** See page 3-3.
Projects Administration Projects Administration	There are no specific preference settings or setup requirements for Projects Administration; however, you should review your Tasks preferences.	**Tasks Preferences –** See page 3-3.
Reports Reports	TURNOVER® for iSeries' reporting features require an open data base connectivity (ODBC) data source for fetching data from your TURNOVER® for iSeries data base. In addition, you might want to use reports stored in a location other than the system default.	**Setting Up TURNOVER® for iSeries Reports –** See page 3-11.
Tasks Tasks, Wisedesk	Regardless of which components you choose, you always get Tasks and Wisedesk. There are no specific setup requirements for the Tasks component; however, you should review the Tasks preference pages.	**Tasks Preferences –** See page 3-3.

REVIEW YOUR TURNOVER® FOR ISERIES PREFERENCES

Some TURNOVER® for iSeries subsystems have preference settings that govern their behavior. Some preferences have default values already set for you. This is true in most cases.

Other preference settings are mandatory for a subsystem to function properly. In Helpdesk, for example, the time-saving and often-used **Add Task to Default Project** and **Call Requester** functions cannot be used until you have defined a default helpdesk project and dialing options in your Helpdesk preferences.



To review your TURNOVER® for iSeries preference settings, visit **Window/Preferences/TURNOVER® for iSeries** and review the contents of the pages you find there.

➧ TURNOVER® for iSeries Preferences look something like this (realize that actual preference pages vary based on what you installed).

Online help is available for all TURNOVER® for iSeries preference pages. You'll find it in the ***Getting Started with TURNOVER® for iSeries*** topics:

1. On the **Help** menu, choose **Help Contents**.
2. When the Help system opens, locate and expand the **TurnOver** book.
3. Expand **Getting Started with TURNOVER® for iSeries**.
4. Expand **Set TURNOVER® for iSeries Preferences**.
5. Some subsystems have multiple pages. Open books and click specific preference pages to see the information.

SET UP FOR IBM I DEVELOPMENT: CONFIGURING OPTIONAL CODE/400 SUPPORT

If you plan to use CODE/400 support for editing and browsing native IBM i source code instead of the built-in LPEX editor, you must configure for CODE/400. Perform these steps to configure TURNOVER® for iSeries for CODE/400 support.

Define a CODE/400 server to the RDi Communications Daemon

To define a CODE/400 server to the RDi Communications Daemon, do the following:

1. Start your IDE software.
2. Locate the **Communication Daemon** icon  in your system tray, and select it with your right mouse button.
3. Choose **Properties...**
4. Click the **Add a New Server** button.
5. Identify your CODE/400 server by providing the information requested on the **Communication Properties** panel.

IBM i IP Name or Address	The system name or IP address defined for this IBM i system.
CODE/400 Server Name	The name you want to assign to this IBM i system when using it as your CODE/400 server.
User ID	A valid IBM i user profile.
Password	A valid password for the IBM i user profile.
Password confirmation	Re-enter the password you supplied above, to confirm it.

6. Click **OK**.

Your new server now appears in the left pane of the **Communication Properties** panel.

Supply CODE/400 information to TURNOVER® for iSeries

To define CODE/400 server and library information for your TURNOVER® for iSeries connection(s) to use, do the following (assuming the connection(s) exist already):

1. Open TURNOVER® for iSeries preferences using **Window ► Preferences**.

2. Expand **TURNOVER® for iSeries** preferences using the plus sign next to **TURNOVER® for iSeries**, and choose the **Code400** page.

3. In the fields on the **Code400** page, supply the following information:

CODE communications library	Every programmer must have a unique communications library. Ideally, this library should be specified as the ***Current library*** value in the user's IBM i user profile.
CODE server	This is the name of the server you defined above.

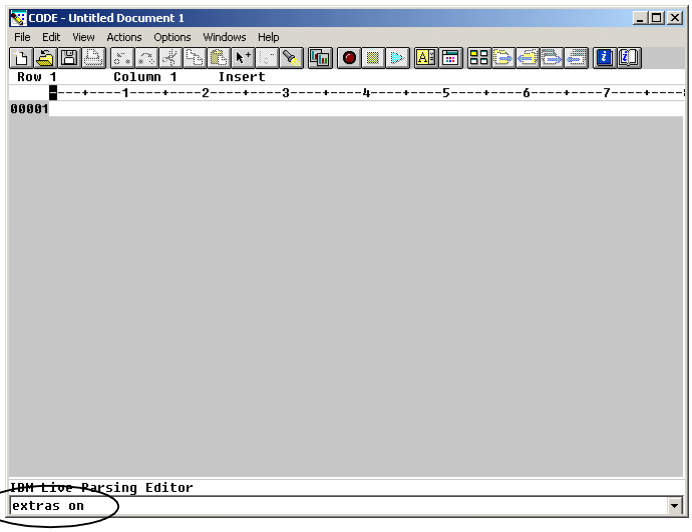
4. Click **OK** to store the preferences settings.

When you create TURNOVER® for iSeries connections, these values will be used by default for CODE/400 communications. If necessary, you can override them in the connection properties at that time. If you leave these values blank in your TURNOVER® for iSeries connection properties, the system retrieves the default values from your TURNOVER® for iSeries preferences.

Activate the TURNOVER® for iSeries macros for CODE/400

To activate the TURNOVER® for iSeries macros for CODE/400, follow these steps:

1. On your PC **Start** menu, select **Start ► Run**.
2. Type **codeedit**.
3. The CODE/400 editor starts. In the command entry area at the bottom of the panel, type "**extras on**" (as shown here):



4. Press **Enter**.
5. Select **Files ► Close view**.

   The CODE/400 editor now recognizes TURNOVER® for iSeries macros.

Once you've performed each set of instructions in this topic, CODE/400 is available for editing and browsing source code or designing screens.

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SET UP FOR JAVA, PC, OR WEB DEVELOPMENT: USING TURNOVER® FOR SVN WITH YOUR PROJECTS

If you installed TURNOVER® for iSeries' Development components, then the TURNOVER® for SVN product is available for providing version control for PC-based artifacts. This section explains what you need to do to begin using TURNOVER® for SVN to control the artifacts associated with your Java, PC, or Web development projects.

TURNOVER® for SVN is based on the open source product Subversion. We recommend reading the Basic Concepts and Guided Tours information in the ***Version Control with Subversion*** book (http://svnbook.red-bean.com/) if you need more background in version control concepts and repository structure.

Important!

Before you can follow the instructions in this topic, TURNOVER® for SVN must be configured on your IBM i computer using the instructions provided in *TURNOVER® for iSeries Supplement #66: Planning and Implementing TURNOVER® for iSeries SVN*[5], and your TURNOVER® for iSeries Administrator must have created one or more repositories for you to use.

Verify with the appropriate person in your organization that this has been done – or work with them to accomplish it – before you proceed.

There are two scenarios for a programmer who is doing this kind of development work: joining a project that is already under way, or starting a brand new project. Choose the instructions that apply to you.

Join a project that is already under way

Under these circumstances, it is likely that the rest of the team is already using a project that exists in the TURNOVER® for SVN repository and has been shared. To join that development effort, all you have to do is check it out to create a working copy. To do that, follow these steps:

Step 1: Get repository information from your TURNOVER® for iSeries Administrator

To follow these instructions, you will need the URL locations of the repositories you are supposed to use. Get this information from your TURNOVER® for iSeries Administrator, or from the person responsible for creating repositories in your organization. An example of a repository URL might be:

```
svn://youribmi/javaprojects/yourproject/trunk
```

Note: If you have access to TURNOVER® for iSeries' Administration subsystem and the necessary authorities for using it, you can look up this information under the **TURNOVER® for SVN** node.

[5] Supplement #66 is available on the Supplements pages of the SoftLanding support site.

Step 2: Define the repository location(s) you need

Open the **TURNOVER® for SVN Repository Exploring** perspective (**Window ▸ Open Perspective... ▸ Other ▸ TURNOVER® for SVN Repository Exploring**). Using the information you've been provided for the first repository you will need to access, do the following:

1. Launch the **New Repository Location Wizard** using the **New Repository Location** button on the view toolbar.

2. On the **Add TURNOVER® for SVN Repository** page, provide the URL information you've been given and click **Finish**.

3. Repeat these steps as many times as needed to define repository locations for all the repositories you'll need to access.

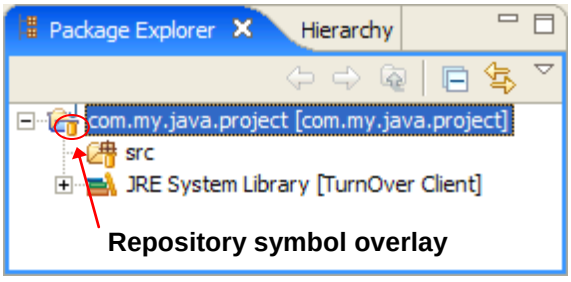
Once you've defined repository locations in this perspective, they are available for use by other wizards to ease your way through the steps that follow.

Step 3: Check out the project folder

1. In the TURNOVER® for SVN Repository Explorer, expand the repository location and locate the folder that contains the project you are joining.

2. Right click the appropriate folder and choose **Check Out As Project...** to have TURNOVER® for SVN place a working copy of the folder and its contents in your workspace.

   To place the project contents in a non-workspace location, choose **Check Out As Project Into...** and use the **Browse For Folder** dialog to locate and select the desired folder.



The repository content is placed in a project folder in the location you specified, and the icons for the project's folders and files are decorated with the repository symbol to indicate that the project is connected to the repository.

You are now ready to begin your development assignment.

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Start a brand new project OR apply TURNOVER® for SVN to work in progress

Under these circumstances, no project folder exists in the repository. You might have begun a project in your local workspace, or you may have been working without TURNOVER® for SVN up until now, and now your project artifacts needs to be shared so that other team members can collaborate.

Step 1: Get repository information from your TURNOVER® for iSeries Administrator

To follow these instructions, you will need the URL locations of the repositories you are supposed to use. Get this information from your TURNOVER® for iSeries Administrator, or from the person responsible for creating repositories in your organization. An example of a repository URL might be:

```
svn://youribmi/javaprojects/yourproject/trunk
```

Note: If you have access to TURNOVER® for iSeries' Administration subsystem and the necessary authorities for using it, you can look up this information under the **TURNOVER® for SVN** node.

Step 2: Define repository location(s)

Open the **TURNOVER® for SVN Repository Exploring** perspective (**Window ▸ Open Perspective... ▸ Other ▸ TURNOVER® for SVN Repository Exploring**). Using the information you've been provided for the first repository you will need to access, do the following:

4. Launch the **New Repository Location Wizard** using the **New Repository Location** button  on the view toolbar.

5. On the **Add TURNOVER® for SVN Repository** page, provide the URL information you've been given and click **Finish**.

6. Repeat these steps as many times as needed to define repository locations for all the repositories you'll need to access.

Once you've defined repository locations in this perspective, they are available for use by other wizards to ease your way through the steps that follow.

Step 3: Create a project in your IDE or the TURNOVER® for iSeries Client

(If you already have an unshared project defined in RDi or in the TURNOVER® for iSeries Client – whether in your workspace or in some other location on your PC – then skip this step.)

If you have project content on your PC but have not been using RDi with TURNOVER® for iSeries until now, then you will need to create a project in order to continue.

Create a project in your IDE or in the TURNOVER® for iSeries Client. If you are not using an Eclipse-based IDE, create your project in the TURNOVER® for iSeries Client. You do this using the **New Project Wizard** in whatever development perspective applies to the kind of development you are doing (Java, Web, Resource, and so on…).

You can launch the **New Project** wizard from the **File** menu or from the context menu in your perspective's exploring view. So:

- Java developers would open the **Java** perspective using **Window ▸ Open perspective ▸ Other ▸ Java**, then start the New Project Wizard to create a Java project.
- Web developers would open the **Web** perspective using **Window ▸ Open perspective ▸ Other ▸ Web**, then start the New Project Wizard to create a Web project.
- Another option is to open the **Resource** perspective using **Window ▸ Open perspective ▸ Other ▸ Resource**, then start the New Project Wizard to create a Simple project.

If your project content exists in a location on your PC other than an IDE or Client workspace, then make sure you un-check the **Use default** box under **Project contents** in the New Project Wizard, and browse to the folder that contains your work. That location becomes your project location, and your project contents become visible in the perspective's Navigator view when you finish the wizard. Then you can proceed with sharing the project to make it available to others.

We do not attempt to fully describe this process here. Use the **Getting Started** topics in your product's online help to guide you through creating your project. Many perspectives have a Basic Tutorial for this purpose.

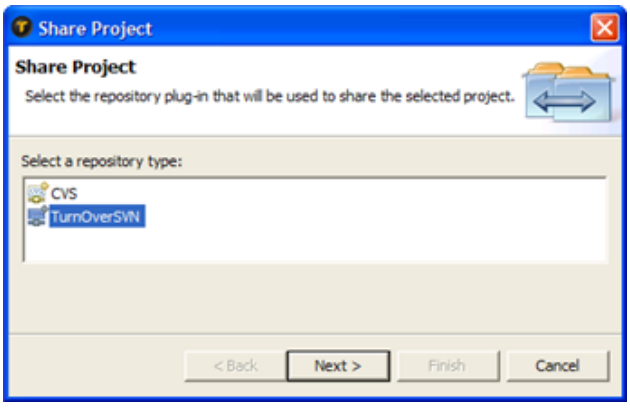
If you are uncertain how to proceed, call UNICOM Systems, Inc. Technical Support at +1-603-924-8818 for guidance.

The remaining steps show a basic Java project for example purposes.

Step 4: Share the project

Sharing a project launches a wizard that guides you through the process of identifying the version control product you want to use (in this case, TURNOVER® for SVN) and which repository you want your project stored in. During this process, TURNOVER® for SVN creates a new repository folder (named for your project by default), commits the contents of your workspace into the new repository location, and checks out the project folder and its contents as a working copy in your workspace.

1. To launch the **Share Project Wizard** from the exploring view of your development perspective, right click your project folder and choose **Team▸Share Project**.
2. On the **Share Project** page, choose **TURNOVER® for SVN**; then click **Next**.



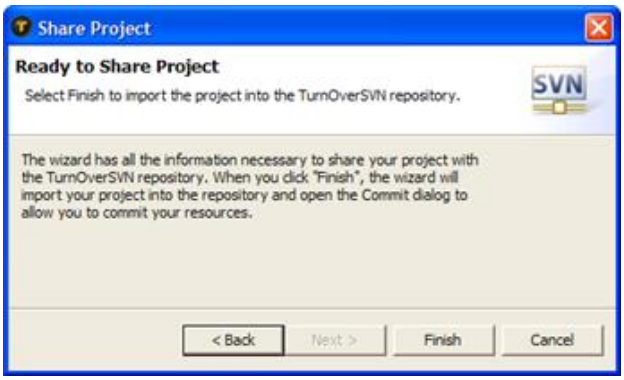
3. On the **Enter Repository Location Information** page, supply the URL of your desired repository location and the appropriate user name and password. Click **Next**.

4. On the **Enter Folder Name** page (not shown), indicate what folder name to use in the repository. Most of the time, you will accept the default value and use the selected project's folder name.

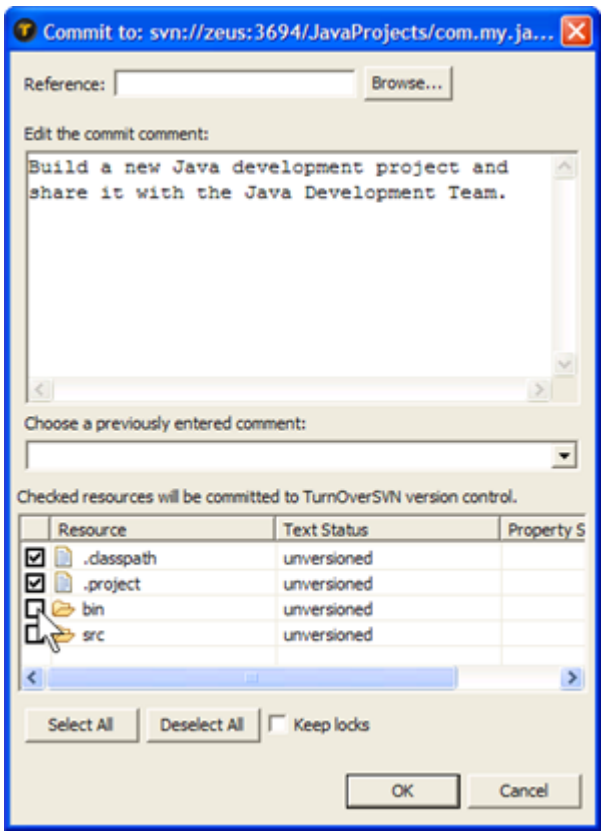
   The selected folder name cannot already exist in the repository.

5. On the **Ready to Share Project** page, click **Finish**.

6. TURNOVER® for SVN creates a repository folder named as you've indicated and presents the Commit dialog so you can store your project resources in the new repository location.



Review the list in the bottom pane of the commit dialog carefully. It shows all the un-versioned resources that TURNOVER® for SVN expects to add to the new repository folder.



Select to be stored in the repository only those project items that everyone will need. (Some files created by various development tools are often temporary or individual in nature, and do not need to be shared. Files such as these can be added to the "ignore" list, so that other developers can have their own versions of these files.)

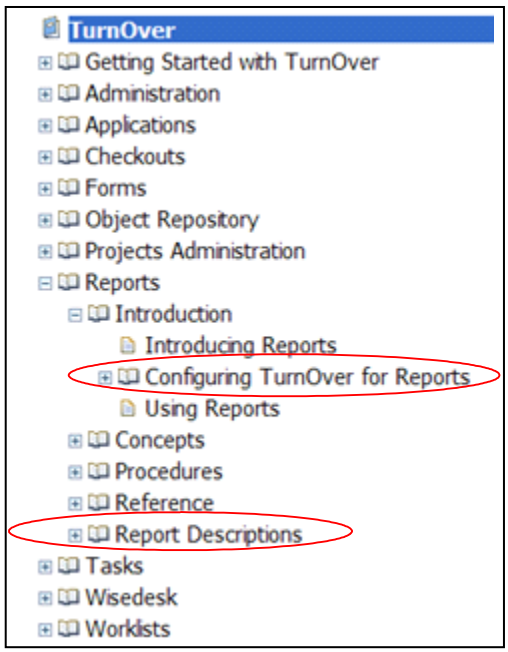
After committing the project contents to the new repository location, TURNOVER® for SVN checks out a working copy into the project location you identified. Other developers can now check out their own working copies, using the instructions for joining a project already under way on page 3-7.

Use the ***Version Control with Subversion*** book (http://svnbook.red-bean.com/) for guidance when determining what items to store in a project repository. We recommend reading the whole book – but you might find the Basic Concepts and Guided Tour chapters especially helpful for a quick start.

CONFIGURING TURNOVER® FOR ISERIES REPORTS

The online help for the TURNOVER® for iSeries Reports subsystem includes complete instructions for configuring and using Reports.

Look for the Reports online help topics in your TURNOVER® for iSeries product's help Table of Contents. This is an example of what you'll see.



In addition, a description containing overview information, user-supplied selection criteria, and a report sample is available for each report we ship. (Look for the **Report Descriptions** book in the online help.)

You can obtain a hardcopy version of the same Report Descriptions in ***TURNOVER® for iSeries Supplement #65: TurnOver Reports Descriptions***. The supplement is available in your TurnOverDocsClients folder and on the Technical Bulletins and Supplements page of our support site (registered sign-in required).

WHAT NEXT?

Now that your TURNOVER® for iSeries client software is configured, we recommend that you review the online help for the component(s) you plan to use while you begin experimenting with the software. If you still have questions about how to proceed, contact your local Technical Support Representative as outlined under the SoftLanding website.