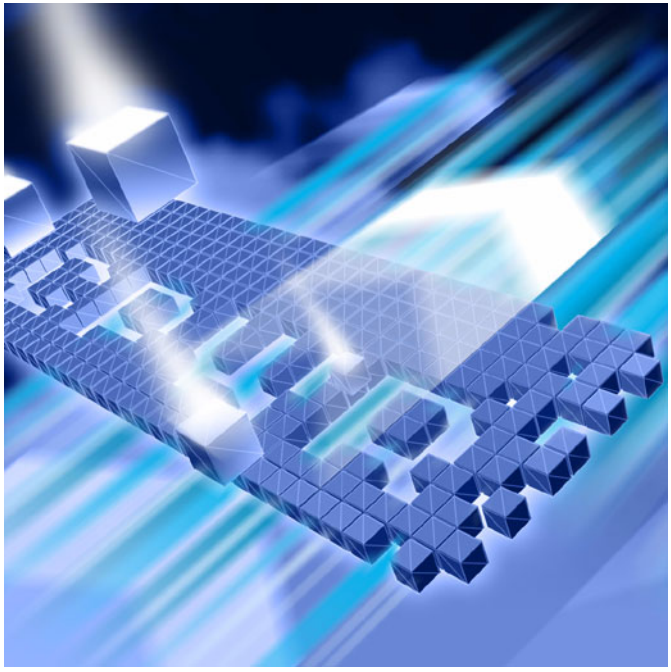

DevPartner® Studio Enterprise Edition Installation Guide

Release 8.2.3

Compuware

Customer support is available from our Customer Support Hotline or via our FrontLine Support web site.

Customer Support Hotline:
1-800-538-7822

FrontLine Support Web Site:
http://frontline.compuware.com.

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June 9, 2009

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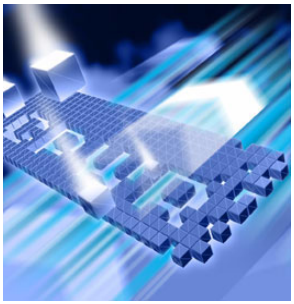

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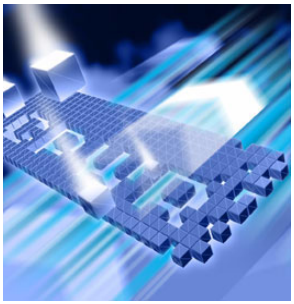


The DevPartner Studio EE Installation Guide provides information and procedures to install and configure TestPartner and Reconcile. It includes the following chapters:

- **Preface** — Description of intended audience for this guide, information you should know before you install a product, related publications, web information, and how to get help.
- **Chapter 1, "Installing TrackRecord"**— List of system requirements, overview of types of installations, detailed instructions on installing the TestPartner server, AutoAlert, and WebServer, TestPartner clients, creating custom client installations, instructions for starting the server, configuring AutoAlert and the WebServer, and uninstalling TestPartner.
- **Chapter 2, "Installing Reconcile"**— List of system requirements, detailed information on installing the Reconcile server, Web Service, and client, creating a share directory for Reconcile production database files, creating a new database, and uninstalling Reconcile.

Who Should Read This Guide

The DevPartner Studio EE Installation Guide is intended for administrators who are installing these products. This guide does not contain usage information. You can find that information in your online help facility and product-specific *User's Guide*.

Compuware assumes that you are familiar with basic Microsoft Windows navigation. If this is not the case, familiarize yourself with the documentation for Microsoft Windows before reading this guide.

Before You Install a Product

Before installing a Compuware product, you should carefully review the product's system requirements: Review the system requirements at the beginning of each product's installation chapter to ensure that you meet the prerequisites for the successful installation and operation of that product.

Note that you can install a Compuware product without a license, but you must install a valid license before you run the product. For information on licensing, see the *Distributed License Management License Guide*.

Related Publications

The TestPartner/Reconcile installation documentation set includes the:

- DevPartner Studio EE Installation Guide — System requirements and instructions for installing TestPartner and Reconcile.
- *Distributed License Management License Guide* — Instructions for licensing your product.

Viewing and Printing Online Books

TestPartner and Reconcile's online books are provided in PDF format, so you need Adobe Acrobat Reader to view them. To install the Adobe Acrobat Reader, go to Adobe's Web site at www.adobe.com.

Because PDF is based on PostScript, a PostScript printer is the most reliable way to print the online books. In most cases, you can also print PDF files to PCL printers. If you cannot print the PDF files to your printer, refer to Adobe's Web site for troubleshooting information.

World Wide Web Information

To access Compuware Corporation's site on the World Wide Web, point your browser at http://www.compuware.com. The Compuware site provides a variety of product and support information.

FrontLine Support Web Site

You can access online technical support for Compuware products via our FrontLine support Web site at http://frontline.compuware.com.

FrontLine provides fast access to critical information about your product. You can read or download documentation, frequently asked questions, and products fixes, or email your questions or comments. The first time you access FrontLine, you are required to register and obtain a password.

Getting Help

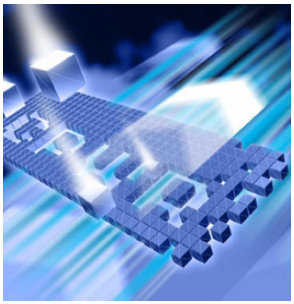
At Compuware, we strive to make our products and documentation the best in the industry. Feedback from our customers helps us maintain our quality standards. If you need support services, please obtain the following information before calling Compuware's 24-hour product support hotline:

- The name, release (version), and build number of the Compuware product. This information is on the covers of the product documentation and is displayed when you select the About command from your product's Help menu.
- Installation information, including installed options, whether the product uses local or network databases, whether it is installed in the default directories, whether it is a standalone or network installation, and whether it is a client or server installation.
- Environment information, such as the operating system and release on which the product is installed, memory, hardware/network specifications, and the names and releases of other applications that were running.
- The location of the problem in the software, and the actions taken before the problem occurred.
- The exact product error message, if any.
- The exact application, licensing, or operating system error messages, if any.
- Your Compuware client, office, or site number, if available.

Technical Support
Compuware Corporation
One Campus Martius
Detroit, MI 48226-5099
1-800-538-7822

Chapter 1

Installing TrackRecord



- Planning Your Installation
- System Requirements
- Minimum Release Requirements for Integrated Tools
- Installing TrackRecord
- Configuring TrackRecord Web Server
- Configuring TrackRecord AutoAlert

Planning Your Installation

TrackRecord consists of separate components for defect and project tracking. Not all components are required for every environment. Table 1-1 on page 4 describes what each component does, and why and where it should be installed. Please refer to this table to determine which components are appropriate for your defect and project tracking requirements. Figure 1-1 and Figure 1-2 provide two typical configuration scenarios. For supported operating systems and minimum system requirements for each component, see "System Requirements" on page 6.

After reviewing this section, carefully follow the instructions in "Installing TrackRecord" to ensure that you install only those components appropriate for your tracking needs.

Migration

All TrackRecord clients must be upgraded to the same release as the server. All pre-existing 6.X databases must have their schemas updated to the 8.2.3 format by running the migration utility included with the TrackRecord 8.2.3. Before updating the pre-existing 6.X database, it is recommended to do a database check and rebuild if necessary to insure a successful migration. A backup of the original database is created and stored in the installation directory.

The migration utility for versions of TrackRecord prior to 8.2.3 is run from the command line and can be called from a batch file if needed.

The syntax for using the migration utility is as follows:

```
trmigrationcmd.exe -u<Username> -p<Password> -d<Database>
```

A graphical user interface is also provided, which you must run from the same machine as the one the server is installed on. The filename is:

```
trmigrationgui.exe
```

Double-click this filename and the TrackRecord Migration window appears. Name appears by default and is disabled. Enter the password (if a password was set up in the previous version) and enter the database name.

The TrackRecord Migration window opens. You can choose to ignore **Database Integrity Errors** by checking the checkbox to save time. This is **not** recommended, however, and may result in a corrupt database.

Click **Begin** to begin the database migration. The progress bar will display progress as the migration completes.

Note: After migration manually add the database to Database Administration Utility and AutoAlert, if necessary.

Silent Install of TrackRecord Clients

Compuware provides a simple non-interactive solution for upgrading your TrackRecord Clients. Utilizing InstallShield's built in silent-install capabilities, this feature allows you to record a response file which contains your interactions. This response file is then passed to **setup.exe** which takes your inputs and runs the installation.

Here are the steps:

1. Prepare a response file for the installation (.iss) by running setup.exe with the -r argument. The file will be created in the default location <WINDOWS> folder. To specify an alternative response file name and location, use the -fl option, as in the following example:

   ```
   setup.exe -r -fl "c:\temp\setup.iss"
   ```

2 The command setup.exe -s runs the installation in silent mode, by default based on the responses contained in the (.iss) response file. This file is usually contained in the same folder as setup.exe but doesn't have to use the -fl option to specify where the response file is located. A log file will be automatically created in the windows folder. To copy to an alternative location use the -f2 option along with the specified path. For example

```
setup.exe -s -fl "c:\temp\setup.iss" -f2 "c:\setup.log".
```

Table 1-1. TrackRecord Installation Components

Component	Purpose	Where to Install
TrackRecord Windows Client (This component is the default and is always installed)	A user running the TrackRecord client software accesses the TrackRecord database by logging in from client machines anywhere on your network.	Install on any machine that will access the database server.
Optional Components		
TrackRecord Server	Accepting input from multiple users, the server will periodically check the database for new information and update users through the use of queries.	If you have a license to use TrackRecord on multiple PCs, you can install TrackRecord's server on a dedicated PC to act as your server and perform a TrackRecord client installation on each workstation that will access the server. The server will house the database and will share it with the client workstations. This component can be installed on a central server on your network. A minimum of one server must be installed on a network for database access.
AutoAlert	Enables TrackRecord's email notification service that provides users an email summarizing changes that might be of interest to them.	AutoAlert must be installed on the database server machine.
Web Server	Allows access to the TrackRecord database through a Web browser.	This component can be installed on a central server on your network. Web Server users access the database by logging in using standard Web browsers, such as Microsoft Internet Explorer.
For a description of additional optional components, see "Installing TrackRecord" on page 8.		

Figure 1-1. Configuration Example #1

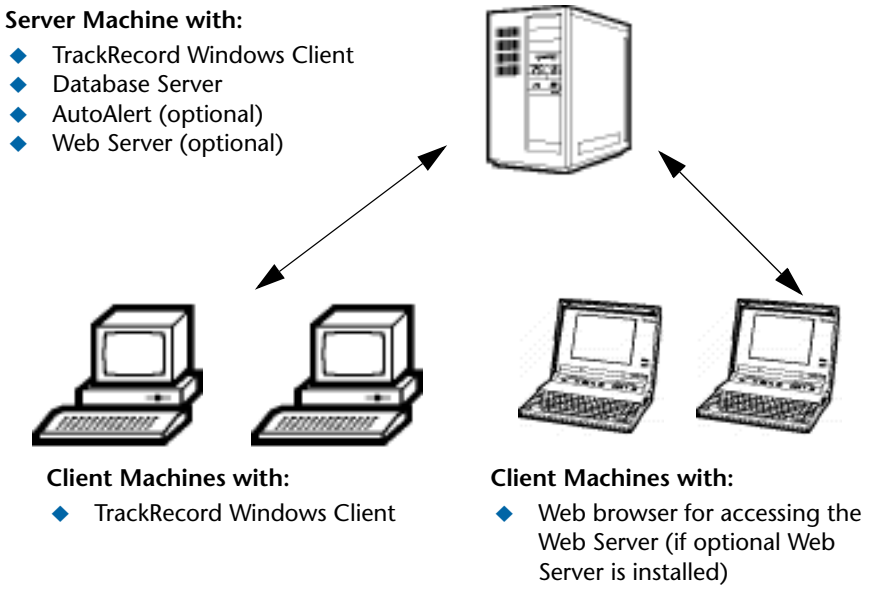
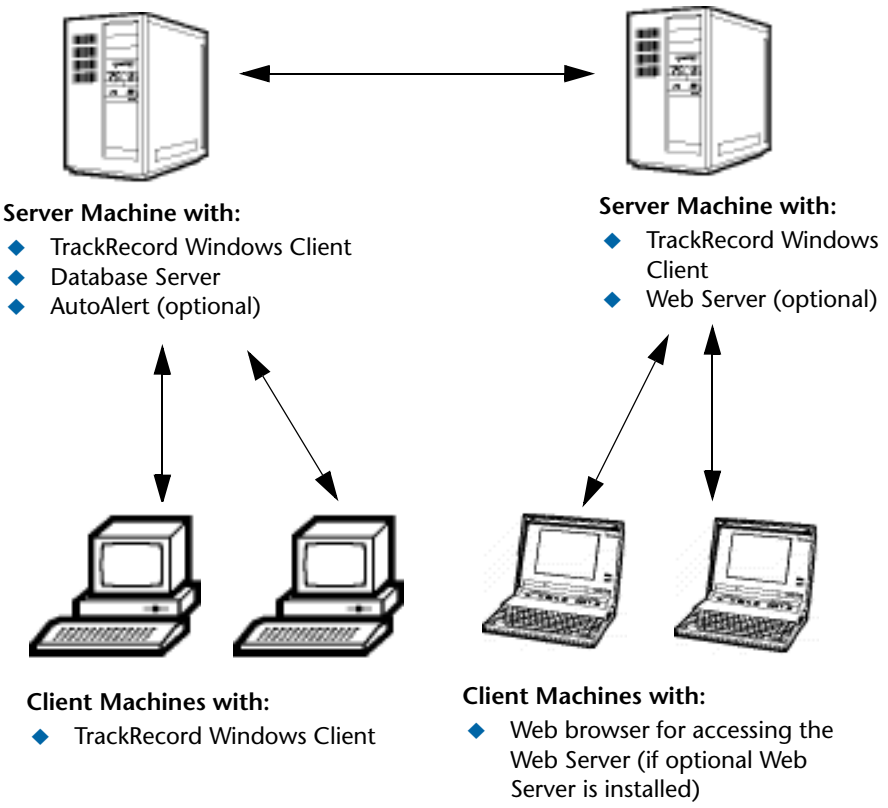


Figure 1-2. Configuration Example #2



System Requirements

This section describes the minimum requirements for running the TrackRecord Windows Client. For more information on the components of TrackRecord, see Table 1-1 on page 4.

Client Requirements

- Mid-level Pentium III PC with 256 MB of RAM running either Microsoft Windows 2000 Service Pack 4, Windows XP Professional Service Pack 1 or Service Pack 2 (32-bit version only), Windows Server 2003 (32-bit version only), or Windows Server 2003 Service Pack 1
- 180 MB of free disk space
- Adobe Acrobat or Acrobat Reader to view the online books in PDF format

- Microsoft Internet Explorer 6 or later
- TCP/IP client software
- 800 x 600 display
- Installing and using TrackRecord requires full administrative rights
- Microsoft .NET framework 1.1 (installed with product)

Web Browser Requirements

The following system requirements are necessary for users to access the Web Server through a browser from their client machine:

- Microsoft Internet Explorer 6 or later

Optional Component Requirements

The following sections detail the minimum system requirements necessary for installing each optional TrackRecord component. For more information on the components of TrackRecord, see Table 1-1 on page 4.

TrackRecord Server Requirements

All the client requirements listed on page 6, as well as the following minimum system requirements, are necessary to install a server that will house the database. This component can be installed on a central server on your network. A minimum of one server must be installed on a network for database access.

- 30 MB of free disk space
- Room for database expansion:
  - A typical database may range from 100 MB to 2 GB depending on the number and size of attachments per database.
  - Recommended database maintenance and backups require disk space three times (3x) the size of all databases in use.

AutoAlert Requirements

All the client requirements listed on page 6, as well as the following minimum system requirements, are necessary for installing TrackRecord's email notification service:

- 40 MB of free disk space.

- A mail system that is either SMTP-compliant or contains a MAPI-compliant client on the PC where AutoAlert is installed. This allows AutoAlert to send messages.

Note: Microsoft Outlook is recommended on the Server where AutoAlert is installed to facilitate configuration and testing of the mail profile.

Web Server Requirements

All the client requirements listed on page 6, as well as the following minimum system requirements, are necessary for the machine upon which the Web Server component is installed:

- 45 MB of free disk space
- One of the following servers installed: Microsoft Internet Information Server (IIS) 5.0 or 6.0

Minimum Release Requirements for Integrated Tools

TrackRecord integrates with many Compuware automated testing, tracking, and requirement management tools as well as third-party software. If you intend to use TrackRecord with any of these tools, please note the following minimum version requirements:

- *QA*Director 5.0.0 or later
- DevPartner Studio 7.0 or later
- DevPartner Fault Simulator 1.0
- DevPartner Fault Simulator SE 1.5
- DevPartner Fault Simulator QA 2.0
- Abend-AID Fault Manager 2.0 or later

Installing TrackRecord

This section explains the installation process for TrackRecord. Please review the "System Requirements" on page 6 to ensure that TrackRecord will install and operate properly on your computer.

Before proceeding with the TrackRecord installation, Compuware recommends that you review the *TrackRecord Release Notes* which includes information about new features, technical notes, and known issues. In addition, it documents recent changes that may not be included in your TrackRecord documentation. Please review this information carefully; the

Release Notes document is updated as new product information becomes available. To review the Release Notes prior to installation, refer to the "Before Installation" section of the "Getting Started" chapter.

Required: Compuware recommends that you exit all non-essential Windows programs before running this setup program. Some Windows programs may interfere with the installation process.

Administrative rights are required to install TrackRecord. To install TrackRecord, follow these steps:

1. Log on as a user with administrator permissions.
2. Insert the *QA*Center Installation Media. The *QA*Center Installation Media browser should automatically appear. Click the **Browse** button to navigate to the `setup.exe` file on the *QA*Center Installation Media.
3. Click **Install QACenter Products**.
4. Click **TrackRecord**.
5. Read the Welcome screen and click the **Next** button. The License Agreement dialog box appears.
6. Read the license agreement and click **Yes** to accept the terms of the agreement. The Customer Information dialog box appears.
7. Type your name and company in the **User Name** and **Company Name** fields. Click the **Next** button. The Choose Destination Location dialog box appears.
8. Select a location for the installation.
   - ◇ By default, TrackRecord installs in the folder `x:\Program Files\Compuware\TrackRecord` where x is the drive where Windows resides on your PC.
   - ◇ To choose an installation path different from the displayed default path, click the **Browse** button and select an existing folder or type the path name in the **Path** field. Click **OK**.
9. Click the **Next** button. The Select Components dialog box appears. This dialog box allows you to select or clear components for installation. Highlight a component to view a brief description.
10. Select the **optional** components you want to install:
    - ◇ **Sample Files**: Installs Visual Basic and Delphi code examples.

Tip: Most organizations will use separate PCs to act as database servers and Web Servers. This separation allows maintenance on one class of server without the interruptions that a machine reboot might cause.

- **TrackRecord Server** : This component is required for database access. This component can be installed on a central server on your network. Accepting input from multiple users, the clients will periodically check the database for new information and update users through the use of queries.
- **AutoAlert**: Enables TrackRecord's email notification service that provides users an email summarizing changes that might be of interest to them. This component can be installed on a central server on your network.
- **Web Server**: This option will not be displayed unless a supported Web Server (Microsoft IIS) is installed on this PC. Web Server allows access to the TrackRecord database through a Web browser. This component can be installed on a central server on your network. After installation, refer to "Configuring TrackRecord Web Server" on page 12 for additional information.
- **Administration Utilities**: Includes the AutoAlert Administration Utility, Import-Export Wizard, and Workflow Editor.
  - **AutoAlert Administration Utility**: Allows you to configure which databases are being polled by the AutoAlert service, identify users that have AutoAlert enabled, and set a variety of AutoAlert options.
  - **Import-Export Wizard**: Steps you through the process of importing, exporting, and creating templates. It automates the creation of this template and saves it, making future imports and exports even faster. The Wizard can only be used to create new items in a database, not update existing ones.
  - **Workflow Editor**: Used to produce an intuitive diagram of the project workflow and create and edit the workflow.

Make your selection(s) and click the **Next** button. The Specify Server dialog box appears.

11 Enter the name of the server in the **Server** field. Generally, the machine name is sufficient, but in some network configurations the IP address might be required. Consult your system administrator for additional information. Click the **Next** button. The Select Program Folder dialog box appears.

12 Specify a location for the TrackRecord program shortcuts. You may type a new folder name, or select one from the existing folders list. Click **Next**. The Start Copying Files dialog box appears.

13 Review the summary of settings that you specified and click the **Next** button to start copying the program files. The Setup Status dialog box displays the progress of the installation.

14 After the installation is complete, you may be prompted to restart your computer. You may choose to restart it now (recommended) or later.

15 Click the **Finish** button to complete the installation of TrackRecord.

Required: If you are upgrading to TrackRecord 8.2.3 from a release older than 6.1.1, copy the contents of your TrackRecord database folder to the new database folder. This is because the TrackRecord directory structure has changed and databases are now installed in a different default location. By default, this folder is `C:\Program Files\Compuware\TrackRecord\Databases`.
Refer to the *TrackRecord Release Notes* for more information.

Where to Go Next

- The evaluation license (CompuLock) supplied with your Compuware product allows you to install the product and run it for a specific time period without first installing a license. During this trial period, you will be informed of how much evaluation time remains.

  At any time during the evaluation period, you can obtain and install a permanent license. When the evaluation period expires, you **must** obtain a license and install it before you can successfully run this product. See the *License Installation Guide* for instructions on installing a license. To access this online book:

  a Insert the *QA*Center Installation Media. If the*QA*Center Installation Media browser does not automatically start, navigate to the media's root directory and run `setup.exe`.

  b Click **Install License Utility**.

  c Click **License Manager**.

- If you installed the optional Web Server component, proceed to "Configuring TrackRecord Web Server" on page 12.

- If you installed the optional AutoAlert component, proceed to "Configuring TrackRecord AutoAlert" on page 18.

Networks Behind a Firewall

TrackRecord supports the TCP/IP protocol on Windows 2000, 2003, and XP. If a firewall stands between the clients and either the database or license server, you might need to make some configuration changes to allow TrackRecord to communicate through the firewall. Please contact Compuware Technical Support for information on how to complete this task.

Note: TrackRecord does not support WAN functionality for the Windows Client.

Configuring TrackRecord Web Server

TrackRecord's Web Server allows users to access a TrackRecord database using Microsoft Internet Explorer. If you are unfamiliar with configuring Web server software, consult with someone familiar with these concepts, such as your system administrator. For a complete description of Web Server administrative tasks, refer to the *Administrator's Guide* manual.

Configuration Steps

Follow these steps to configure the TrackRecord Web Server:

1. Consult the "System Requirements" on page 6 to ensure that the Web Server will operate on your system.
2. Install the Web Server (optional component). See "Installing TrackRecord" on page 8.
3. Run TrackRecord Web Server on Windows Server 2003. See "Running TrackRecord Web Server on Windows Server 2003" on page 12.
4. Set the user account from which Web Server will be run. See "Setting Up a User Account" on page 14.

Running TrackRecord Web Server on Windows Server 2003

Before running TrackRecord Web Server on Windows Server 2003, perform one of the following procedures to configure your server. If you do not, you will receive a "file not found" error when trying to access the Web Server home page.

Configure the server to allow ISAPI extensions:

1. On the server where the TrackRecord Web Server is installed, click the Start button and then choose **Control Panel>Administrative Tools>IIS Manager**.
2. In the IIS Manager tree, right-click on the Websites folder and choose Properties from the popup menu.
3. On the Properties dialog box, click the **Service** tab.
4. Select the option Run WWW service in IIS 5.0 isolation mode.
5. Click **OK**.

6 In the IIS Manager tree, click the Web Service Extensions folder.

7 In the right pane, right-click on the All Unknown ISAPI Extensions entry.

8 On the popup menu that opens, choose **Allow**.

9 On the IIS Manager message that opens, click **Yes**.

Create a new application pool

1 On the server where the TrackRecord Web Server is installed, click the Start button and then choose **Control Panel>Administrative Tools>IIS Manager.**

2 In the IIS Manager tree, right-click on the Application Pools folder. From the popup menu that opens, choose **New>Application Pool**. The Add New Application Pool dialog box opens.

3 In the Application pool ID field, type a name for the new application pool. For example, cgi-win.

4 Select the option Use default settings for new application pool and click **OK**.

5 In the IIS Manager tree, right-click on the icon for the application pool you just created and choose Properties from the popup menu.

6 Click the Identity tab.

7 In the Predefined field, choose Local System and click OK.

8 Click **Yes** on the IIS Manager message that opens.

9 In the IIS Manager tree, click the Web Sites folder. Under the Default Web Site icon, right-click on cgi-win and choose Properties from the popup menu.

10 In the Application pool field, choose the application pool you created previously.

11 Click **OK**.

12 In the IIS Manager tree, click the Web Service Extensions folder.

13 In the right pane, right-click on the All Unknown ISAPI Extensions entry.

14 On the popup menu that opens, choose **Allow**.

15 On the IIS Manager message that opens, click **Yes**.

Setting Up a User Account

The Web Server can be run from the interactive user's account, the launching user's account, or by specifying a user's account.

The differences between the settings are as follows:

Table 1-2. Web Server Account Settings

Account Setting	Description	Note/Caution
This user **(recommended)**	Allows the Web Server to run using the security context of the specified user's account. It will then be authenticated in the domain.	The account that is used requires "log on as a service" privileges.
Interactive user	Allows the Web Server to run using the security setting of the user who is currently logged in (the interactive user) and does not require administrative rights. The interactive user may be the same as the launching user. For security reasons, Compuware recommends that you create a user account on the server with no administrative rights that is used for a log in. If security is breached, the Admin functions of the Server will not be accessed.	If selected, the Web Server will not start if a user is not logged on.
Launching user	Specifies that the Web Server will run using the security setting of the user who started the Web Server (the launching user). The launching user may be the same as the interactive user. This allows access to the Web Server if there is no active login on the server machine. Although this option appears to be a more secure option, if the security is somehow breached by a malicious attack, the attacker will have access to the entire machine.	The Windows authentication service does not allow an identity that is passed from one computer over the network to be used to access network resources.

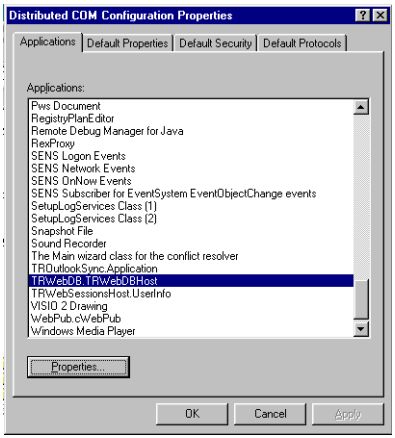
Windows 2000

To set the user account from which the Web Server will be run, perform the following procedure after installation:

Note: A user with read-write access to the database should be logged in while the Web Server is running.

1. Click **Start>Run**.
2. In the **Open** field, type `DCOMCNFG`. Click **OK**.
3. On the **Applications** tab (Figure 1-3), select **TRWebDB.TRWebOutlineHeader** and click **Properties**.

Figure 1-3. Distributed COM Configuration Properties Dialog Box



4. Click the **Identity** tab.
5. Ensure that the user account is set to **This User** (recommended).
6. In the **User** field, enter a user account that will be used to run the Web Server or click **Browse** to locate an account name. This can be a user or a service account you created to run services.
7. In the **Password** and **Confirm Password** fields, enter the password for the specified user account.
8. Click **Apply** to save your changes. Click **OK**.
9. Repeat steps 3–8 for **TRWebSessionsHost.TRCurrEditItems**, and **TRWebSessionsHost.TRWebSessions**.
10. Click **OK**.

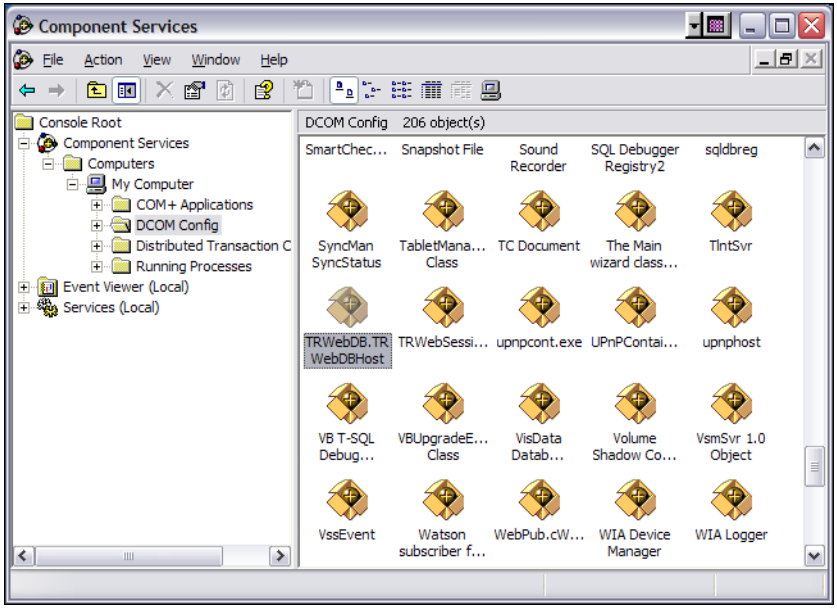
Windows XP and 2003

To set the user account from which the Web Server will be run, perform the following procedure after installation:

Note: A user with read-write access to the database should be logged in while the Web Server is running.

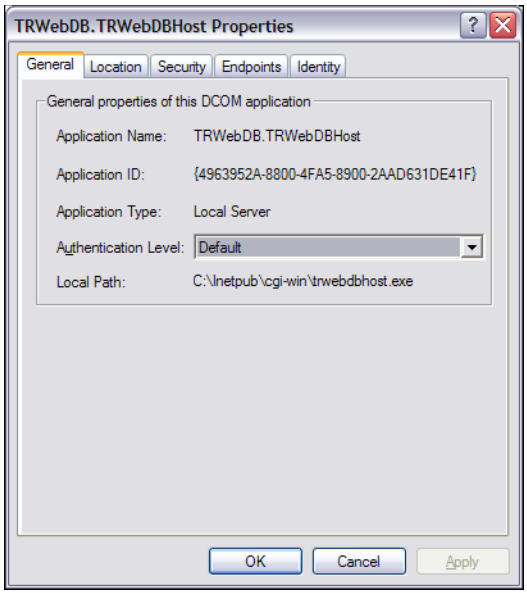
1. Click **Start>Run**.
2. In the **Open** field, type `DCOMCNFG`. Click **OK**.
3. In the **Component Services** window, navigate to **Component Services>Computers>My Computer>DCOM Config** (see Figure 1-4).

Figure 1-4. Component Services window



4 Right-click on **TRWebDB.TRWebDBHost** and select **Properties** from the menu. The **TRWebDB.TRWebDBHost Properties** dialog box appears.

Figure 1-5. Properties dialog box



5 Click the **Identity** tab.

6 Ensure that the user account is set to **This User** (recommended).

7 In the **User** field, enter a user account that will be used to run the Web Server or click the **Browse** button to locate an account name. This can be a user or a service account you created to run services.

8 In the **Password** and **Confirm Password** fields, enter the password for the specified user account.

9 Click **Apply**. Click **OK**.

10 Repeat steps 4–9 for **TRWebSessionsHost.TRWebSessions**.

11 Click **OK**.

Client Setup

Web Server requires that Java and Javascript be installed and enabled in the client's browser.

Configuring TrackRecord AutoAlert

TrackRecord AutoAlert sends email messages to users to notify them of changes in the TrackRecord database. AutoAlert lets you define flexible criteria for notifying each user of changes that might be of interest to them. Consult the "System Requirements" on page 6 to ensure that AutoAlert will operate on your system.

There are three steps to configuring AutoAlert:

- "Configuring an AutoAlert Mailbox and Profile for MAPI" on page 18
- "Defining an Email Package" on page 18
- "Starting the AutoAlert Service" on page 19

Configuring an AutoAlert Mailbox and Profile for MAPI

After the AutoAlert software is installed, you must create a mailbox and mail profile for AutoAlert's use.

1. On the machine on which the AutoAlert Server is installed, log on as a user who is a member of the domain in which the service will run.
2. Using your preferred information service, such as the Microsoft Exchange Server, create a mailbox for AutoAlert's use.

   AutoAlert email notices are sent from this mailbox. Consult your mail service's documentation for instructions on creating mailboxes.
3. Create a profile named `AutoAlert` that has access to the mailbox.

   Since access to the mailbox is through a service, the service must run as a user that can access the mailbox.

Defining an Email Package

TrackRecord AutoAlert users can choose to use SMTP or MAPI as their underlying mail service.

SMTP (Simple Mail Transfer Protocol) is a TCP/IP protocol used in sending and receiving email that provides the ability to use non-Microsoft mail servers, such as Lotus Notes, or UNIX-based mail servers. Users typically use a program that uses SMTP for sending email and either POP3 or IMAP for receiving messages that have been received for them at their local server.

MAPI (Messaging Application Program Interface) is a Microsoft Windows program interface that enables you to send email from within a Windows application.

1. On a machine on which the AutoAlert Administration Utility has been installed, from the **Start** menu, choose **Programs>Compuware>TrackRecord>AutoAlert Administration Utility**.
2. On the TrackRecord AutoAlert Servers dialog box, click the **View Server** button to select one of the available AutoAlert servers.

Note: If password protection was selected, enter the password for the AutoAlert server.

3. Click the **Server Options** button.
4. Click the **Email Package** tab.

   For more information on this tab, refer to the *TrackRecord Administrator's Guide* or AutoAlert Administration Utility's online help.
5. Select the email option to define what email package will be used to send email messages:
   - ◇ Select **Use MAPI** to use a MAPI profile and user information.
   - ◇ Select **Use SMTP** to enable the AutoAlert server to use SMTP. Enter the name of the SMTP server and the address of the user sending the email (e.g. xxxx@mycompany.com).
6. Click the **Apply** button and **OK** when your settings are complete.

Starting the AutoAlert Service

Windows 2000

1. From the **Start** menu, choose **Settings>Control Panel**.
2. Double-click the **Administrative Tools** icon.
3. Select **Services** and then double-click the **TrackRecord AutoAlert Service**.
4. If you are using MAPI:
   - ◇ Click the **Log On** tab.
   - ◇ Select the **This Account** option
   - ◇ Enter the name of the user that has access to the specified mailbox. The login format should be *domain\username*. The specified account should have "log on as a service" rights on the network.
   - ◇ Enter and confirm the password.
5. Click **OK** to close the dialog box. When prompted, stop the service.

6 Double-click the **TrackRecord AutoAlert Service.**

7 Click **Start**.

8 Click **OK**.

To construct databases to be monitored, and to learn about all AutoAlert administration tasks, refer to the *TrackRecord Administrator's Guide*.

Windows XP and Windows 2003

1 From the **Start** menu, choose **Control Panel>Administrative Tools>Services**.

2 Double-click the **TrackRecord AutoAlert Service**.

3 If you are using MAPI:

- ◇ Click the **Log On** tab.
- ◇ Select the **This Account** option
- ◇ Enter the name of the user that has access to the specified mailbox. The login format should be *`domain\username`*. The specified account should have "log on as a service" rights on the network.
- ◇ Enter and confirm the password.

4 Click the **Apply** button.

5 Click the **OK** button.

6 Close the Services window.

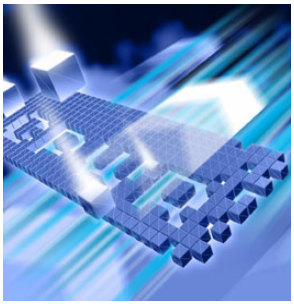
To construct databases to be monitored, and to learn about all AutoAlert administration tasks, refer to the *TrackRecord Administrator's Guide*.

Troubleshooting AutoAlert

If AutoAlert is not working, consult the AutoAlert online help for more information. You can access the AutoAlert help by selecting **AutoAlert Administration Utility Help** from the **TrackRecord** program group.

Chapter 2

Installing Reconcile



- Planning Your Installation
- System Requirements
- Installing Reconcile
- Migrating Data from Reconcile 1.0.x
- Configuring a Server for the Reporting Framework

Planning Your Installation

Reconcile is a requirements management system that allows a project team to create, change, track, and report on project requirements. Reconcile maintains project information, such as a requirement's name, description, ID, author, audit trail, and links between this and other requirements in a relational database. Reconcile creates a set of database entries for each requirement. For use in a multi-user environment, Reconcile requires the creation of a shared database. Refer to "Installing and Creating the Reconcile Database on the Database Server" in your Reconcile documentation for instructions.

System Requirements

This section describes the minimum requirements for running Reconcile. It includes the following:

- "Client Requirements" on page 22
- "Database Server Requirements" on page 22
- "Web Server Requirements for the Reconcile Reporting Framework" on page 24

Client Requirements

- Mid-level Pentium III PC with 512 MB of RAM.
- 300 MB minimum available disk space.
- Microsoft Windows 2000 or 2000 Server, SP4; 2003; or XP Professional, SP1, 1A, and 2.
- TCP/IP protocol installed on all computers.
- Microsoft Internet Explorer 5.5 (build 5.50.4134.0600) or later. You can install Internet Explorer from the DPSEE CD, or allow Reconcile to install a minimal version.
- (Optional) Microsoft Word and/or Excel for importing/exporting requirements.
- Adobe Acrobat or Reader (provided on the DPSEE CD) to view the online books in PDF format.
- Installing Reconcile requires full administrative rights.

Database Server Requirements

The following sections describe the minimum requirements for specific server types.

SQL Server Requirements

- 1GHz processor with 512 MB RAM.
- Microsoft Windows 2000 Server, 2000 Advanced Server, or 2000 Professional, SP4; XP Professional, SP1, 1A, or 2; Server 2003 Enterprise; or 2003 Standard.
- Microsoft SQL Server 7.0 with Service Pack 3, or 2000 with Service Pack 3.
- A database instance on the SQL Server database server to hold Reconcile data. Configure the database instance as follows:
  - If you are using SQL Server 7.0 and the database instance is defined, you must specify code page 1252 and sort order 52 (also known as ISO 8859-1).
  - If you are using SQL Server 2000, specify the SQL_Latin1_General_CP1_C1_AS as collation.
- An SQL Server user ID and password to allow the Reconcile administrator to set up the database server.

Oracle Server Requirements

- 1GHz processor with 512 MB RAM.
- Microsoft Windows 2000 Server, 2000 Advanced Server, or 2000 Professional, SP4; XP Professional, SP1, 1A, or 2; Server 2003 Enterprise; or 2003 Standard.
- Oracle 8.1.7 or 9i.
- A database instance set up on the Oracle database server to hold Reconcile data. Configure the database instance as follows:
  - When the Oracle database instance is defined, you must specify the Storage Character Set as iso 8859-1 West European.
  - The NLS_LANGUAGE parameter should be set in the parameter file as: NLS_LANGUAGE = 'AMERICAN'
  - If you are using Windows 2000, set the NLS_LANGUAGE parameter to AMERICAN_AMERICA.WE8ISO8859P1 in the following locations:
    - HKEY_LOCAL_MACHINE\SOFTWARE\ORACLE\NLS_LANG
    - HKEY_LOCAL_MACHINE\SOFTWARE\ORACLE\ALL_HOMES\IDO\NLS_LANG
    - HKEY_LOCAL_MACHINE\SOFTWARE\ORACLE\HOME-\NLS_LANG
- An Oracle user ID and password to allow the Reconcile administrator to set up the Oracle database server.
- Access to a valid owner name (also known as a schema) on the Oracle database server. This owner name is the userID that will be associated with all the Reconcile tables in the database.
- You must have the Reconcile workstation set up as an Oracle client. The workstation should be able to connect and communicate with the Oracle database server. An appropriate SQL*Net Client must be installed and configured on the workstation. The SQL*Net connect string alias establishes the connection to the Reconcile database instance on the Oracle database server.

Web Server Requirements for the Reconcile Reporting Framework

- 1 GHz processor with 512 MB RAM.
- Microsoft Windows 2000; XP Professional, SP2; or 2003.
- IIS 5.0, 5.1. or 6.0.
- Microsoft Internet Explorer 6.0, SP1.
- Oracle 8.1.7 (Client), Oracle 9x (Client).

Installing Reconcile

This section explains the installation process for Reconcile. Please review the "System Requirements" on page 21 to ensure that Reconcile will install and operate properly on your computer.

Required: Compuware recommends that you exit all non-essential Windows programs before running this setup program. Some Windows programs may interfere with the installation process.

Previous versions of Reconcile: If a previous version of Reconcile is installed on your computer, Compuware recommends that you uninstall it before installing the new version. Failure to do so may cause problems.

Before proceeding with the Reconcile installation, Compuware recommends that you review the Reconcile Release Notes, which include information about new features, technical notes, and known issues. In addition, the release notes describe any recent changes that may not be included in your Reconcile documentation. Please review this information carefully; the Release Notes document is updated as new product information becomes available. To review the Release Notes prior to installation, refer to "Before You Install" in Chapter 1 of your product documentation.

To install Reconcile, follow these steps:

1. Log on as a user with administrator permissions.
2. Insert the second **DPSEE** CD into the CD-ROM drive.
   If the CD browser does not start automatically, navigate to the CD's root directory and run `setup.exe`.
3. Click **Install Compuware Reconcile**.

4 Read the **Welcome** screen and click **Next**.
The installer displays the **License Agreement** dialog box.

5 Read the license agreement and click **Yes** to accept the terms.
The installer displays the **Customer Information** dialog box.

6 Type your name and company in the **User Name** and **Company Name** fields and click **Next**.
The installer displays the **Choose Destination Location** dialog box.

7 Select a location for the installation:

- By default, Reconcile installs in the folder:
  ***x*:\Program Files\Compuware\Reconcile**
  where *x* is the drive where Windows resides on your PC.
- To designate a custom installation path, click **Browse** and select an existing folder, or type the full path in the **Path** field. Click **OK**.

8 Click **Next**.
The **Select Components** dialog box opens.

9 Select the components to install:

- **Database Server**: Installs an instance of the Microsoft SQL Server Engine (MSDE) on the local machine. A database is created within this instance, providing the ability to run Reconcile locally.
- **Windows Client**: Installs the Reconcile Windows client.
- **Reporting Framework**: Installs the Reconcile Reporting Framework.

10 Enter the database location (if you selected the **Database Server** option), and click **Next**.

11 Specify a location for the Reconcile program shortcuts.
You may type a new folder name, or select one from the existing folders list.

12 Click **Next**.
The installer displays the **Start Copying Files** dialog box.

13 Review the summary of settings that you specified, and click **Next** to start copying the program files.
The **Setup Status** dialog box displays the progress of the installation.

14 Click **Finish** to complete the installation of Reconcile.

Note: After the installation is complete, you may be prompted to restart your computer. If you are, you may choose to restart it now (recommended) or later.

Migrating Data from Reconcile 1.0.x

If you are upgrading from Reconcile 1.0.x, use the **Reconcile Migration Utility** to move your data into Reconcile 02.00. The following sections explain the rules by which data is migrated, and describes how to locate and start the Migration Wizard.

Business and Data Migration Rules

- Every user migrated from Reconcile 1.0.x that has the same User Name as a user in the Reconcile 02.00 database has his User Name appended with a unique number in a parenthesis (). The numbers in parenthesis increase for each duplicate user name added to the database.

  Example: If the User Name *Admin* exists in both the Reconcile 1.0.x and 02.00 databases, this user name is migrated to the Reconcile 02.00 database as *Admin (1)*.

  If the user names *Admin* and *Admin (1)* exist in the Reconcile 02.00 database, and a user named *Admin* is migrated from Reconcile 1.0.x, that user is named *Admin (2)* in the Reconcile 02.00 database.

- The maximum length for all attribute values in Reconcile 02.00 is 12,000 characters. All attribute values that are migrated from Reconcile 1.0.x to Reconcile 02.00 are truncated to 12,000 characters.

- Reconcile 02.00 includes a new requirement attribute called Short Description. This attribute appears as a field on the Requirement Properties dialog box, but not on the Attributes list. In Reconcile 02.00, for every requirement, this attribute is populated with the first 256 characters of the Description field.

- There is another static requirement attribute, the Priority attribute, in Reconcile 02.00 that was not static in Reconcile 1.0.x. A static attribute is a system created attribute and exists (defaults) in every requirement regardless of the requirement type. It is possible that there are dynamic (user-created) attributes in Reconcile 1.0.x named Priority. When these attributes are migrated from Reconcile 1.0.x to Reconcile 02.00 they will conflict with the static Priority attributes. To avoid conflicts, a Priority attribute migrated from Reconcile 1.0.x has a number appended in parenthesis ().

Example: An attribute with the name of Priority in the Reconcile 1.0.x database is migrated and renamed to Priority (1) in the Reconcile 02.00 database.

- Reconcile 1.0.x User Group information is not migrated to Reconcile 02.00 because User Groups are not implemented in Reconcile 02.00.
- Every Administrator-type user in Reconcile 1.0.x becomes an Administrator in Reconcile 02.00 with the role of QAManager.
- Every Normal-type user in Reconcile 1.0.x is migrated to Reconcile 02.00 and is given the role of Guest.
- Every Inactive-type user in Reconcile 1.0.x is migrated to Reconcile 02.00 and is given the role of Guest.
- Users that are migrated from Reconcile 1.0.x to Reconcile 02.00 are not added to any migrated projects. You must add users to the appropriate projects after the migration is completed.
- Reconcile 02.00 user passwords cannot be less than five (5) characters. Therefore, any user password in Reconcile 1.0.x that is less than 5 characters will be changed to the word 'reconcile' in the Reconcile 02.00 database.
- Any user password that is a string of all characters will be changed to the word 'reconcile'.
- All the Integration Attributes in Reconcile 1.0.x are migrated as normal attributes in Reconcile 02.00. We do not have the concept of Integration Attributes in Reconcile 02.00 since we are not doing direct integration with *QA*Director or TrackRecord. Integration attributes are the ones that appear on the Integration tab on the Requirement Properties screen in Reconcile 1.0.x.
- Report data is not migrated from Reconcile 1.0.x to Reconcile 02.00.
- The following three Attribute Definition Types are no longer available in Reconcile 02.00: Button, Read-Only and Hidden.

  Data (requirement attribute values) that were of this type in the Reconcile 1.0.x database will not be migrated to the Reconcile 02.00 database.

Migrating Data

The **Migration Utility** available from Reconcile's System Administration Center walks you through the migration of data from Reconcile 1.0.x to 02.00.

To use the Migration Utility:

1. Review "Business and Data Migration Rules" on page 26.
2. Open the **System Administration Center**.
3. From the **Tools** menu, select **Migration Utility**.
   The Data Migration Wizard opens.
4. Follow the instructions on the Database Wizard to migrate your database.

Configuring a Server for the Reporting Framework

This section explains how to configure your server to run the Reconcile Reporting Framework. It includes the following:

- "Configuring the Reporting Framework on the Server" on page 28
- "Configuring Windows 2003 Web Server for the Reporting Framework" on page 29
- "Configuring Oracle 9.2 for the Reporting Framework" on page 30

Configuring the Reporting Framework on the Server

To configure the Reconcile Reporting Framework on the server:

1. Run the **Database Configuration Utility** located in **Start>Programs>Compuware >Reconcile>Reporting Framework>Database Configuration Utility**.
2. Select your database type from the **Data Source Type** area.
3. Enter the server name in the **Server Name** field.
   For example: `DTW41062D1\Reconcile`.
4. Enter the database instance in the **Database Name** field.
   For example: `Reconcile`.
5. Enter the user ID in the **User ID** field.
6. Enter the user password in the **Password** field.
7. Enter a port value in the **Port** field.
   The default value is 1433.

8 Click **Test** to validate the configuration.
The configuration utility displays the **Test Status** dialog box.

9 If the test is successful, click **OK**.

10 Click **OK** to exit the configuration utility.

Configuring Windows 2003 Web Server for the Reporting Framework

If you install the Reconcile Reporting Framework on Windows 2003, complete the following steps to use the Internet Information Service (IIS) Web server with the Reporting Framework.

1 Open the **IIS Manager**.
For more information, refer to your Microsoft Windows documentation.

2 Select the **Web Service Extensions** option.

3 Select **Allow** from the **All Unknown ISAPI extensions** list.

4 If the **ASP.NET v1.1.4322** option exists, select **Allow**.

5 If **ASP.NET v1.1.4322** option does not exist:

   a Open the Windows **Add/Remove Programs** utility.

   b Click **Add/Remove Windows Components**.
   The Windows **Component Wizard** opens.

   c Select **Application Servers** from the **Components** list and click **Details**.

   d Select **ASP.NET** from the Subcomponents list and click **OK**.

   e Click **Next**.

   f **Open the IIS** Manager.

   g Select the **Web Service Extensions** option.

   h Select **Allow** for the **ASP.NET v1.1.4322** option.

6 From the IIS Manager, select **Websites>Properties**.

7 Select the **Service** tab.

8 Select the **Run WWW Service in IIS 5.0 isolation mode** option.

9 Click **OK**.

Adding the Web Server as a Trusted Site on Internet Explorer 6

In addition, if you're using Internet Explorer 6 on Windows 2003 Server, you may need to add the web server as a Trusted Site in Internet Explorer.

To add the web server as a trusted site:

1. Open **Internet Explorer**.
2. Select **Tools>Internet Options**.
3. Select the **Security** tab.
4. Select the **Trusted Sites** icon.
5. Click **Sites**.
6. Enter your web server's URL and click **Add**.

Configuring Oracle 9.2 for the Reporting Framework

To configure the Oracle 9.2 client to add users with full permissions, complete the following steps.

1. Navigate to the **Ora92** folder in the Oracle installation directory.
2. Right-click on the **Ora92** folder and select **Properties**.
3. Select the **Security** tab.
4. Add the following users with full control:
   - ◇ IUSR_<MachineName>
   - ◇ IWAM_<MachineName>
   - ◇ ASPNET
   - ◇ Everyone
5. Click **OK**.

Where To Go Next

- The evaluation license supplied with your Compuware product allows you to install the product and run it for a specific time period without first installing a license. During this trial period, you will be informed of how much evaluation time remains. At any time during the evaluation period, you can obtain and install a permanent license. When the evaluation period expires, you must obtain a license and install it before you can successfully run this product. See the Compuware License Installation Guide for instructions on installing a license.

  To access this online book:

  a. Insert the second DPSEE CD into the CD-ROM drive. If the CD browser does not automatically start, navigate to the CD's root directory and run **setup.exe**.

  b. Click **Compuware License Installation Guide**.

- For instructions on setting up a shared database. Refer to "Installing and Creating the Reconcile Database on the Database Server" in your product documentation.

- To begin using Reconcile, refer to the Reconcile online help.

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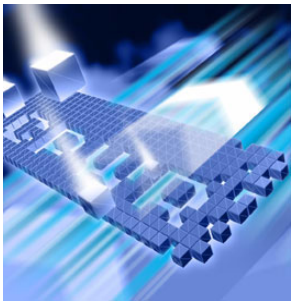

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