TestPartner

Installation and Configuration Guide

Release 6.0

COMPUWARE®

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Maintaining the Installation

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Who Should Read This Guide

This guide is intended for administrators who are installing or configuring TestPartner; it does not contain reference or usage information. You can find that information in the *TestPartner Help*.

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.

Related Publications

In addition to the *TestPartner Installation and Configuration Guide*, the TestPartner documentation set includes the *Distributed License Management Installation Guide*, which contains instructions for licensing your *QA*Center product. Both installation guides are only available in PDF format.

You can view and print the installation guides from your *QA*Center installation media or from Compuware's FrontLine customer support Web site at http://frontline.compuware.com

Because PDF is based on PostScript, a PostScript printer is the most reliable way to print the installation guides. 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 at http://www.adobe.com for trouble-shooting 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 customer support for Compuware products via the FrontLine support Web site. FrontLine provides fast access to critical information about your *QA*Center product. You can read or download documentation, frequently asked questions, and product fixes, or e-mail your questions or comments. To access FrontLine, follow these steps:

1   Open a Web browser and go to: http://frontline.compuware.com
    The Welcome to FrontLine page appears.

2   On the right side of the page, enter your login ID and password and click the **Login** button.

Note: If you are a first-time visitor, click the **Register** button to receive your free password to access FrontLine. After you complete the registration form, your login ID and password will be e-mailed to you and your account will be activated.

3   From the list in the center of the page, select a product and click the **Go** button. You will see the product's FrontLine home page, where you can access documentation, technical information, fixes, and other support items.

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 *QA*Center product. This information is displayed when you select the **About** command from your product's Help menu. The name and release are also on the covers of the product documentation.

- 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 *QA*Center product 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.
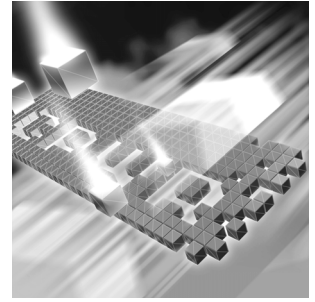
Compuware Customer support

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One Campus Martius
Detroit MI 48226-5099
1-800-538-7822

Chapter 1
Getting Started

◆ Overview of QACenter
◆ Installation Types
◆ Before Installation

Overview of *QA*Center

*QA*Center is a suite of automated software quality products for enterprise and e-business applications. *QA*Center offers a comprehensive solution for IT organizations concerned with assuring quality and performance, while keeping pace with faster development cycles. *QA*Center includes:

*QA*Director: Coordinates the entire testing process by organizing, tracking, and executing automated and manual tests. QADirector integrates with Compuware's testing, program analysis, defect tracking, and requirements management tools.

The QADirector Test Management Server reads job submissions from the database, manages jobs, tracks available test execution machines, and manages the licenses for manual test Web execution. It also reports on the status of jobs in progress.

The QADirector Test Execution Server is installed on the local machine. The Test Execution Server allows jobs to run on a computer, however you do not need a Test Execution Server to run jobs via QACenter Portal.

CARS Workbench: Provides a comprehensive reporting facility that is consistent among the QACenter point products. It enables users with various roles and responsibilities to create and view detail, summary, and cross-product reports. CARS Workbench ties together requirements planning, test planning, test execution, and defect tracking to provide users with a centralized view of application quality. It also integrates with Reconcile and QADirector and provides QADirector Web functionality.

*QA*Hiperstation+: Works with mainframe *QA*Hiperstation to test host-based applications directly from your Windows desktop. This integrated, workstation-based interface tool uses 32-bit code that provides improved performance and better stability on 32-bit Windows platforms.

QARun: Tests enterprise client/server applications. *QA*Run creates and runs test scripts that support a wide variety of development tools and the diverse components of today's corporate environments. *QA*Run couples advanced verification facilities with error-recovery mechanisms to reliably test local and remote applications.

Reconcile: Helps create and control project requirements. It stores the project requirements in a relational database. You can view the requirements through Microsoft Word, a reporting view (grid), and the Web. Reconcile is fully integrated with *QA*Director and TrackRecord. Working together, these products help you manage project development from conception through delivery.

TestPartner: Tests Web- and Windows-based applications that use Microsoft technologies. TestPartner records user actions to quickly produce powerful visual tests. Each recorded visual test displays as a series of actions in clear, concise steps that can be easily understood by all testers, from novice to expert. You can record user sessions with the application, add validation functions, and replay the sessions later to ensure that the application works as expected. TestPartner supports testing of Java, Visual Basic, and Visual C++ applications; browser-based Web applications; and component-based applications, including GUI and non-GUI COM components on the client side or server side.

TrackRecord: Records and reports information about products being developed or supported. Information on team members, testers, schedules, and defect reports is recorded in an object-oriented database; it can be retrieved using TrackRecord's query and reporting features.

Installation Types

Before you begin, determine the type of installation you need to perform:

Initial Installation: An initial installation is the first-time installation of a product on your computer. See the installation chapter for each product for instructions.

Modify: A modification of the product installation occurs when you add or remove one or more of a product's components, but not all of them. See the maintenance chapter for instructions.

Repair: A repair installation may be necessary due to a corruption of a program or the inadvertent deletion of the product. See the maintenance chapter for instructions.

Remove: A remove or uninstall removes all the components of a product. See the maintenance chapter for instructions.

Before Installation

Before installing any *QA*Center product, you should carefully review the following information:

System Requirements

Review the system requirements to ensure that you meet the prerequisites for the successful installation and operation of the product. System requirements are also listed in the Release Notes.

Release Notes

Review the Release Notes for information about new features, technical notes, and known issues that may enhance or impact your product's performance. Release Notes contain recent changes that may not be included in your *QA*Center product documentation.

Release Notes can be viewed from the *QA*Center installation media or on FrontLine, Compuware's product support web site. The Release Notes on FrontLine are periodically updated as new information becomes available.

To access the TestPartner Release Notes from the QACenter installation media:

1   From the QACenter installation media, access the TestPartner Release Notes. The Release Notes open in your default Web browser.

2   View the Release Notes or print the document.

3   After viewing or printing the Release Notes, close the document to return to the QACenter installation media.

To access the TestPartner Release Notes on FrontLine:

1   Open a Web browser and go to: http://frontline.compuware.com
    The Welcome to FrontLine page appears.

2   On the right side of the page, enter your login ID and password and click the **Login** button.

Note: If you are a first-time visitor, click the **Register** button to receive your free password to access FrontLine. After you complete the registration form, your login ID and password are e-mailed to you and your account is activated.

3   From the list in the center of the page, select **TestPartner** and click the **Go** button. TestPartner's FrontLine home page appears.

4   On the left side of the TestPartner's home page, select the **Documentation** link. You will see the TestPartner documentation page, which includes links to Release Notes and other documentation types.

5   Click the **HTML** or **PDF** icons to view documents.

Chapter 2
Installing TestPartner
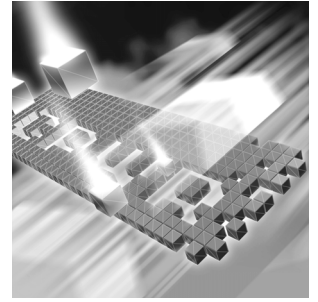
System Requirements

TestPartner has the following minimum system requirements:

Hardware:
◆ Mid-level Pentium III PC with 512 MB of RAM.

◆ 300 MB of hard disk space on the system disk (the disk on which the operating system is installed), and an additional 220 MB when installing SQL Server 2005 Express as the default TestPartner database.

◆ Optimized for 1024 x 768 or higher screen resolution.

Operating System:	◆ Microsoft Windows Server 2003 with SP1 or R2, including Standard Edition (32 bit) and Enterprise Edition (32 bit).
	◆ Windows XP Professional with SP1a or SP2.
	◆ Windows 2000 with SP4.
Browser	◆ Microsoft Internet Explorer 7.0, Microsoft Internet Explorer 6.0 (SP1,SP2), or Microsoft Internet Explorer 5.5 (SP2).
Database	◆ Microsoft SQL Server 2005, SQL Server 2000 SP4. For SQL Server 2000 SP4, MDAC 2.6 SP2 (2.62.7400.1) is required for establishing an ODBC connection.
	◆ Microsoft SQL Server 2005 Express SP2 (for up to 5 users). Prerequisites include MDAC 2.8 (2.80.1022.3), .NET Framework 2.0, Windows Installer 3.1, and either Windows Server 2003 SP1, Windows XP Professional SP2, or Windows 2000 SP4.
	◆ MSDE 2000 database (for up to 5 users).
	◆ Microsoft Access 2000 (as a single-user database).
	◆ Oracle 10.2.0, 10.1.0, 9.2.0, 9.0.1, RDBMS database on Microsoft or Unix/Linux platforms. For Oracle, Windows Authentication is supported on a Microsoft platform.
Other Software	◆ Microsoft Visual Basic for Applications 6.5 (6.5.1020), (VBA) 6.4 (6.4.9969, 6.4.9971, and 6.4.9972), 6.3 (6.0.9108), 6.2x (6.0.8967), or 6.2 (6.0.8714). TestPartner installs VBA 6.2 (6.0.8714).
	◆ Adobe Acrobat or Acrobat Reader (provided on the installation media or www.adobe.com) to view the documentation provided in PDF format.
	◆ Additional resources may be required for testing tools and the application under test.

Input Method Editor (IME) Support

TestPartner supports the following IMEs for the listed input systems.

Legend   X = Supported

Japanese Input
System:

Description	Name	Windows 2000	Windows XP	Windows 2003
MS-IME2000	imejp.ime	X	X	X
MS-IME2002	imjp81.ime		X	X
MS-IME2003	imjp9.ime		X	X

Korean Input System:

Description	Name	Windows 2000	Windows XP	Windows 2003
MS-IME98	imekr98u.ime	X		
IME 2000	imekr61.ime		X	X

Simplified Chinese
Input System:

Description	Name	Windows 2000	Windows XP	Windows 2003
QuanPin	winpy.ime	X	X	X
MS-PinYin98	pintlgnt.ime	X	X	
MS-PinYin 3.0	pintlgnt.ime		X	X
NeiMa	wingb.ime	X	X	
ZhengMa	winzm.ime	X	X	X
ShuangPin	winsp.ime	X	X	X
WuBi86	winwb86.ime	X*	X*	X*
WuBi98	winwb98.ime	X*	X*	X*
Enhanced Unicode	surime.ime		X*	X*

* Only appears with Windows XP and Windows Server 2003 with Office XP Multilingual Support complete install.

Description	Name	Windows 2000	Windows XP	Windows 2003
Alphanumeric	romanime.ime	X	X	X
Unicode	unicdime.ime	X	X	X
Quick	quick.ime	X	X	X
Phonetic	phon.ime	X	X	X
New Phonetic	tintlgnt.ime	X	X	X
New ChangJie	cintlgnt.ime	X	X	X
DaYi	dayi.ime	X	X	X
ChangJie	chajie.ime	X	X	X
Big5 Code	winime.ime	X	X	X
Array	winar30.ime	X	X	X

Notes: IMEs not listed above are not supported.

Text Services FrameWork (TSF) and the Rich Edit control (version 4.1 and above) are not supported for recording. This does not affect playback.

Office 2003 IMEs are only supported for the Japanese Input System.

Installing TestPartner

This section explains the installation process for TestPartner. Please review "System Requirements" on page 13 to ensure that TestPartner installs and operates properly on your computer.

Before proceeding with the TestPartner installation, Compuware recommends that you review the TestPartner Release Notes which includes information about new features, technical notes, and known issues. The Release Notes also document recent changes that might not be included in TestPartner 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, see 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.

If you have a TestPartner release prior to 5.4 installed, you must back up your data and uninstall TestPartner before installing the new version.

You must have administrator permissions to install and use TestPartner.

To install TestPartner:

1 From the *QA*Center installation media, select the **TestPartner** installation link. The installation wizard appears.

2 Read the welcome page and click **Next**. The **License Agreement** page appears.

3 Read the license agreement. If you consent with the agreement, then click **Yes**. The **Customer Information** page appears.

4 Type your name and company in the **User Name** and **Company Name** fields. Click **Next**. The **Choose Destination Location** page appears.

5 Select a location for the TestPartner installation.

◇ By default, TestPartner installs in the folder x:\Program Files\Compuware\TestPartner where *x* is the drive where Windows resides on your computer.

◇ To specify a different folder, click the **Browse** button and select the desired folder. Click **OK**.

6 Click **Next**. The **Select Features** page appears. This page allows you to select features for installation. Highlight a feature to view a brief description.

7 Select additional features to install:

Note: If you are upgrading a TestPartner release and have previously installed any additional features, you must reinstall these features to use them with the current release.

◇ **Active Object Recognition:** Lets you define support for Java controls that may not be recognized by TestPartner out of the box. The Active Object Recognition (AOR) utility includes a collection of core Java classes and lets you add custom Helper classes and metadata based on your application and requirements. This component is typically used by advanced Java users.

◇ **SAP eCATT Integration:** Configures TestPartner for proper integration with SAP eCATT, the online SAP testing tool for the SAP Web Application Server 6.20. This allows for storage and retrieval of TestPartner data from the eCATT repository and full integration for external testing from eCATT.

Note: You must have SAPGUI for Windows 6.20 or above installed to enable the eCatt integration feature. An informational warning message may appear stating this requirement. Click **OK** and proceed with the installation if you have SAPGUI for Windows 6.20 installed.

◇ **Visual Studio Integration:** There are two selections for Visual Studio Integration. Microsoft Visual Studio 2005 Team Suite must be installed to install these features.

— **Visual Studio Team Suite Integration:** This option installs TestPartner's integration with Microsoft Visual Studio 2005 Team Suite. This integration allows you to use TestPartner as the testing solution for Visual Studio 2005 test projects. With the option installed, you can create TestPartner functional test suites, run TestPartner scripts, analyze test runs, and launch TestPartner from within Visual Studio 2005. Note that if selecting this feature, the **Testing Tools** subcomponent of the **Team Developer and Tester Tools** component for Visual Studio 2005 Team Suite must be installed to install this feature.

— **Visual Studio Team Test Load Agent Integration:** This option installs TestPartner's remote testing integration with Visual Studio 2005. This integration allows TestPartner scripts to run on remote computers through the Microsoft Visual Studio 2005 Team Test Load Agent. Note that the Microsoft Visual Studio 2005 Team Test Load Agent and the Visual Studio 2005 Team Test Load Controller must be installed on the same computer to install this feature.

Note: To start TestPartner functional testing in Visual Studio 2005 Team Suite, start Visual Studio 2005 Team Suite after installing TestPartner and click **Project>Add New Test...** or **Test>New Test....** When the **Add New Test** dialog box appears, select the Compuware Functional Test template and click **OK**.

◇ **SQL Server 2005 Express Edition:** Installs SQL Server 2005 Express as the default TestPartner database. This feature is selected by default. If you do not want to install SQL Server 2005 Express Edition, clear the check box. TestPartner will install Microsoft Access 2000 as the default TestPartner database. For additional information about SQL Server 2005 Express, see "Setting Up a SQL Server or MSDE Database with TestPartner" on page 24.

Make your selection(s) and click **Next**. The **Start Copying Files** page appears.

8 If you want to review or change any of your installation settings, click **Back**. Otherwise, click **Next**. The **Setup Status** page appears and displays an installation progress bar to inform you of the current progress of the installation. When the installation completes, the **InstallShield Wizard Complete** page appears.

9 The **Display Release Notes** check box is selected by default. Clear this check box if you do not want the Release Notes to automatically appear. Click **Finish** to complete the installation of TestPartner.

Note: After the installation completes, you may be prompted to restart your computer.

Where To Go Next

◆ The evaluation license supplied with your installation of TestPartner allows you to install the product and run it for a specific period of time without first installing a license. During this trial period, you are 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. Refer to the *Distributied License Management Installation Guide,* which you can access from the *QA*Center installation media, for instructions on installing a license.

◆ Adobe Acrobat or Acrobat Reader is required to view installation guides in PDF format. If Adobe Acrobat or Acrobat Reader is not installed on your computer, you can install it from the *QA*Center installation media.

◆ TestPartner automatically configures an ODBC data source when installed with a SQL Server 2005 Express or Access database. Before using TestPartner with other databases, you must create and config-ure an ODBC data source and an ODBC database. Continue to the following sections for instructions:

Additionally, to use SQL Server 2005 Express in a multi-user environment, see the procedure "Setting Up Users in SQL" in the section "Setting Up Users in SQL Server" on page 28.

After you have created and configured your database resources, you are ready to begin using TestPartner. Refer to the *TestPartner Help* for more information about the tasks and activities associated with preparing for, planning, building, and running test projects.

Performing an Unattended Installation

You can perform an unattended installation of TestPartner, in which setup screen entries are made automatically from the command line. An unattended installation can be convenient if you want to perform several installations of TestPartner with identical configurations on different computers from a remote location.

Note: Software distribution management software, such as Microsoft Systems Management Server (SMS), is required to install TestPartner remotely.

Unattended Installation Prerequisites

Before performing an unattended installation of TestPartner, you must install the following prerequisites on each target installation computer (installation commands to run each executable from the *QA*Center installation media are provided after each prerequisite):

Note: Depending on the operating system of the target installation computer, some or all of the following installation prerequisites may already be installed.

You must install VBA 6.2 even if a later version of VBA is already installed.

When using Microsoft Access 2000 as the default TestPartner database, VBA 6.2 is the only installation prerequisite.

◆ **VBA 6.2 (6.0.8714)**
```
Msiexec.exe /I"\requirements\vba6.msi" /q
REBOOT=ReallySupress
```

◆ **.NET 2.0 Framework**
```
\requirements\Donetfx.exe "/q:a /c:"install /l /q\"
```

◆ **MDAC 2.8 (2.80.1022.3)**
```
\requirements\Mdac_typ.exe "/q:a /c:"dasetup.exe /q /
n"
```

◆ **Windows Installer 3.1**
```
\requirements\WindowsInstaller-KB893803-x86.exe /
quiet /norestart
```

◆ **SQL Server 2005 Express with database instance**
```
\requirements\SQLEXPR.EXE /qn ADDLOCAL=SQL_Data_Files
INSTANCENAME=QACInst SECURITYMODE=SQL SAPWD=qacenter
```

◆ **SQL Server Management Studio Express (optional)**
```
Msiexec.exe /I"\require-
ments\SQLServer2005_SSMEE.msi" /q REBOOT=ReallySu-
press
```

Unattended Installation Steps

1 Run `TestPartner.msi` from a command line prompt.

2 Specify the desired installation options and properties.

Note: For a complete list of options and properties, consult the Windows Installer SDK documentation. Public properties customized for TestPartner installation are listed later in this section.

As an example, the command for an unattended basic installation of TestPartner is as follows:

```
C:\>msiexec /i /requirements/TestPartner.msi /qn
```

In this example, the display option `/qn` is used to set the user interface level to "**n**one". The user is never prompted to supply information and never sees any messages. In addition to setting the display option, you can also set other options, such as whether to restart a computer after installation, display a log file, or uninstall a previous TestPartner installation. To quickly view the standard Windows Installer options, type the following from a command line:

```
C:\>msiexec /i /requirements/TestPartner.msi /help
```

TestPartner also provides customized public properties that you can use to specify additional installation features.

Customized Public Properties for Unattended Installations

For a listing of these properties, see the following table:

Table 2-1. TestPartner Customized Public Properties for Unattended Installations

Property	Description
INSTALLLEVEL	Specifies installation features by level. Each feature is assigned a value. A feature is installed only if the value of the feature is equal or less than the INSTALLLEVEL value.

The available TestPartner features and values are:

- Core = 1
- SQL_Server_2k5_Exp_Ed = 50
- Active_Object_Recognition = 150
- SAP_eCATT_Integration = 175
- VSTS_Client_Integration = 200
- VSTS_Remote_Integration = 225

"Core" specifies a base installation of TestPartner with Access 2000 installed as the default database.

"SQL_Server_2k5_Exp_Ed" specifies a SQL Server 2005 Express installation. You must install the SQL Server 2005 Express prerequisites prior to specifying this feature. See "Unattended Installation Prerequisites" on page 20.

Examples

To install Active Object Recognition in addition to base installation features:

```
msiexec /i TestPartner.msi /qn
INSTALLLEVEL=150
```

To install all features:

```
msiexec /i TestPartner.msi /qn
INSTALLLEVEL=225
```

Table 2-1. TestPartner Customized Public Properties for Unattended Installations

Property	Description
ADDLOCAL	Specifies installation features by name. Each feature is assigned a name. A feature is installed only if its name is specified.

The available TestPartner features listed by name are:

- Core
- Active_Object_Recognition
- SAP_eCATT_Integration
- SQL_Server_2k5_Exp_Ed
- VSTS_Client_Integration
- VSTS_Remote_Integration

"Core" specifies a base installation of TestPartner with Access 2000 installed as the default database.

"SQL_Server_2k5_Exp_Ed" specifies a SQL Server 2005 Express installation. You must install the SQL Server 2005 Express prerequisites prior to specifying this feature. See "Unattended Installation Prerequisites" on page 20.

Examples

To install Active Object Recognition in addition to base installation features:

```
msiexec /i TestPartner.msi /qn
ADDLOCAL"Core,
Active_Object_Recognition"
```

To install all features:

```
msiexec /i TestPartner.msi /qn
ADDLOCAL"Core,
Active_Object_Recognition,
SAP_eCATT_Integration,
VSTS_Client_Integration,
VSTS_Remote_Integration"
```

When using ADDLOCAL, you must always include "Core", in addition to any specific features.

Unsupported Windows Installer Options

For unattended installations, TestPartner does not support the following Windows installer options:

◆ **/a - Administrative installation option**: This option installs a product on the network.

◆ **/j - Advertising option**: This option advertises a product.

◆ **/c - New instance advertising option**: This option advertises a new instance of a product.

Setting Up a SQL Server or MSDE Database with TestPartner

TestPartner accesses test assets stored in the TestPartner database. This section describes how to set up a SQL Server 2005 Express, SQL Server 2005, SQL Server 2000, and MSDE database for use as a TestPartner database.

For SQL Server 2005 Express, the following setup requirements are automatically created by the TestPartner installer:

◆ SQL Server 2005 Express database with instance "**QACInst**" and strong password "**qacenter**".

◆ User with admin rights "**TestPartnerAdmin**" with strong password "**TestPartnerAdmin**". General user "**TestPartnerUser**" with strong password "**TestPartnerUser**".

◆ Data source name "**TestPartner_SQL**".

◆ Database schema "**TestPartnerDB**".

Note: Compuware recommends that a database administrator or person with general knowledge of database administration performs the database setup and configuration.

SQL Server/MSDE Database Connection Requirements

Each client computer uses an ODBC data source to connect to the database. As a result, connecting to the TestPartner database has the following requirements:

◆ Each computer running TestPartner must be able to access the computer where the database resides.

◆ TestPartner must be installed on all computers accessing the database.

◆ The database connection must be configured for use with TestPartner. See "Configuring a TestPartner Database Connection" on page 62.

Creating a New SQL Server Database

This section describes how to create a SQL Server 2005 database using SQL Server Management Studio and a SQL Server 2000 database using SQL Server Enterprise Manager. In addition to the following procedures, you must also populate the database with TestPartner tables using the Database Maintenance utility, which is described in "Preparing the SQL Server TestPartner Database" on page 32.

Create a SQL Server database on the server computer by performing the following procedures. Separate instructions are provided for both SQL Server 2005 and SQL Server 2000.

SQL Server 2005

1   In the Object Explorer of SQL Server Management Studio, right-click the Databases folder and choose **New Database**. The New Database window appears.
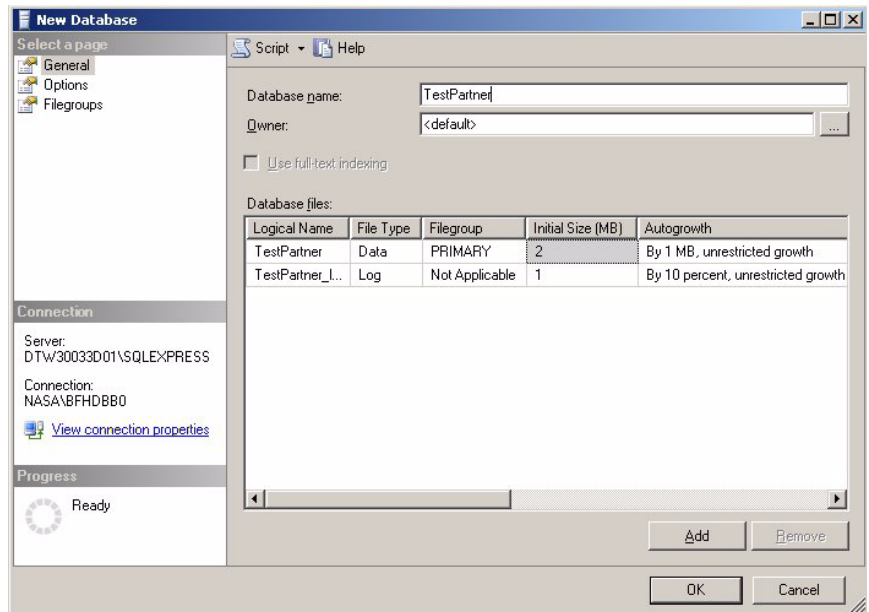
2   Enter a name for the database in the **Database Name** field.

3   Click **OK**.

SQL Server 2000

1 From the SQL Server Enterprise Manager, expand the navigation tree until the Databases folder is visible.

2 Right-click the Databases folder and choose **New Database**. The Database Properties window appears.

3 In the Database Properties window, enter a name for the database in the **Name** field and click **OK**.

Creating a New SQL Server Admin User

You need to create a SQL Server user with system administrator rights to perform subsequent setup steps.

Note: For SQL Server 2005 Express, TestPartner automatically creates a user with admin rights "**TestPartnerAdmin**" and strong password "**TestPartnerAdmin**".
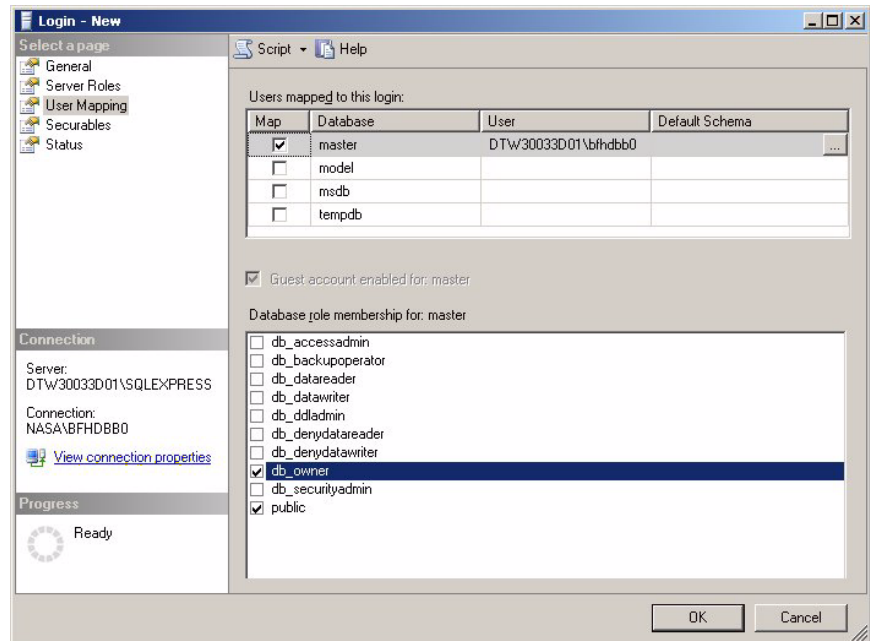
To create a SQL Server admin user:

SQL Server 2005

1 In the Object Explorer of SQL Server Management Studio, navigate to the Security folder and expand it. Right-click the **Logins** icon and choose **New Login**. The New-Login window appears.
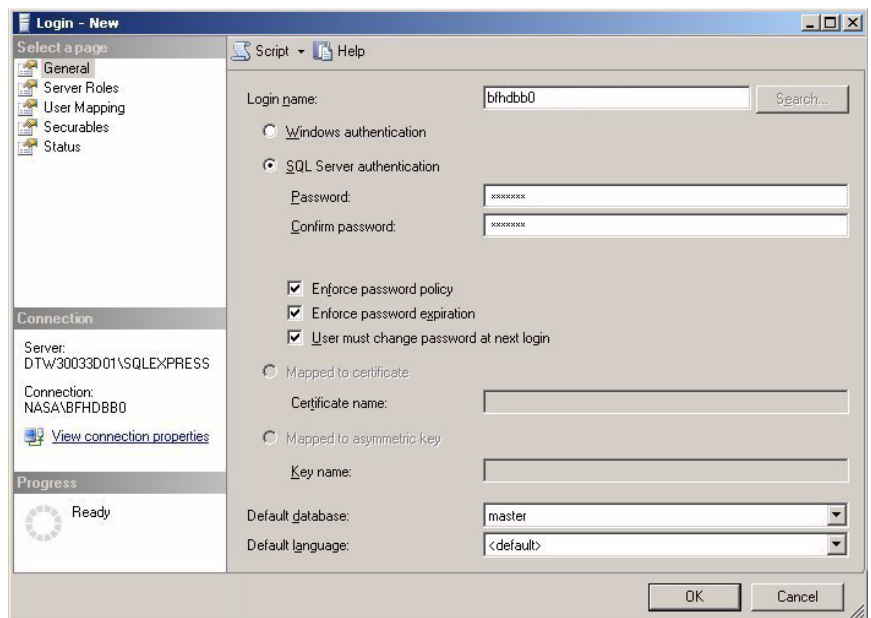
2 In the **General** page, type a user ID in the **Login name** field.

3 Select **SQL Server Authentication** and enter a password. Select the default database from the **Default database** drop-down list.

4 In the **Server Roles** page, select **sysadmin** from the Server roles list.

5 Select the **User Mapping** page.

6 In the **Map** column, select the check box for the database that your login can access. By default, the login name appears in the **User** column. Leave this value.

7 In the **Database role membership for** list, select **db_owner.**

8 Click **Ok**.

9 In the Object Explorer, right-click the Schema folder and choose **New Schema**. Create a new Schema. The new schema name must match the name of the previously created user with system admin rights.

10 Assign the new user with system administrator rights as the owner of the schema.

11 Click **OK**.

12 Select he newly created user and set the default schema to the newly created schema.
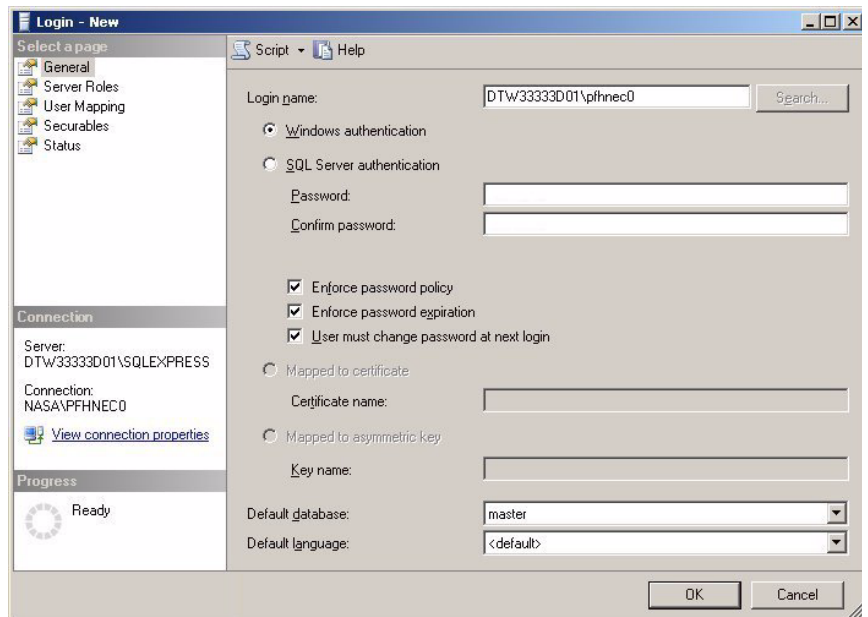
SQL Server 2000

1 In SQL Server Enterprise Manager, navigate to the Security folder and expand it. Right-click the **Logins** icon and choose **New Login**. The SQL Server Login Properties dialog box appears.

2 Select the **General** page. Enter a user ID in the **Name** field and select **SQL Server Authentication**.

3 Click the **Server Roles** tab. Select **System Administrators**.

4 Click the **Database Access** tab. Select your TestPartner database and select db_owner in the database roles list that appears below. Click **OK**.

Setting Up Users in SQL Server

The following procedure should be performed on the database server computer for each user who needs to connect to the SQL Server database.

SQL Server 2005 and SQL Server 2005 Express

1 In the Object Explorer of SQL Server Management Studio, navigate to the Security folder and expand it. Right-click the **Logins** icon and choose **New Login**. The New-Login window appears.

2 Select the **General** page. Enter a user ID in the **Login name** field. Select either **Windows Authentication** or **SQL Server Authentication**.

3 Select the default database from the **Default database** drop-down list.

4 Select the **User Mapping** page.

5 In the **Map** column, select the check box for the database that your login can access. By default, the login name appears in the **User** column. Leave this value.

6 In the **Default Schema** column, enter the default schema. For use with TestPartner, the default schema must match the schema of the previously created user with system admin rights.

7 In the **Database role membership for** list, leave the default option **public** selected. Select the **db_datareader** and **db_datawriter** check boxes.
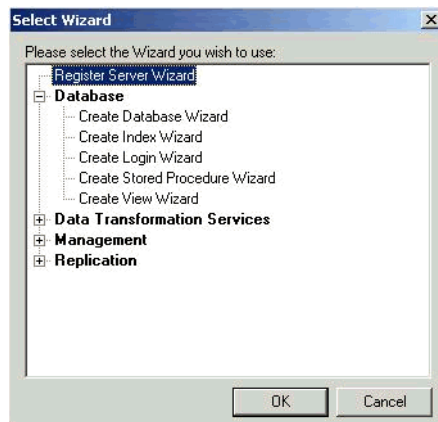
8 Click **OK.**

Required: To use SQL Server 2005 Express with multiple users, each SQL Server 2005 Express installation must be enabled for remote connectivity. To enable SQL Server 2005 Express for remote connectivity, refer to the Microsoft support article "How to configure SQL Server 2005 to allow remote connections".

SQL Server 2000

1 Click **Start>Programs>Microsoft SQL Server>Enterprise Manager**. The SQL Server Enterprise Manager Window appears.
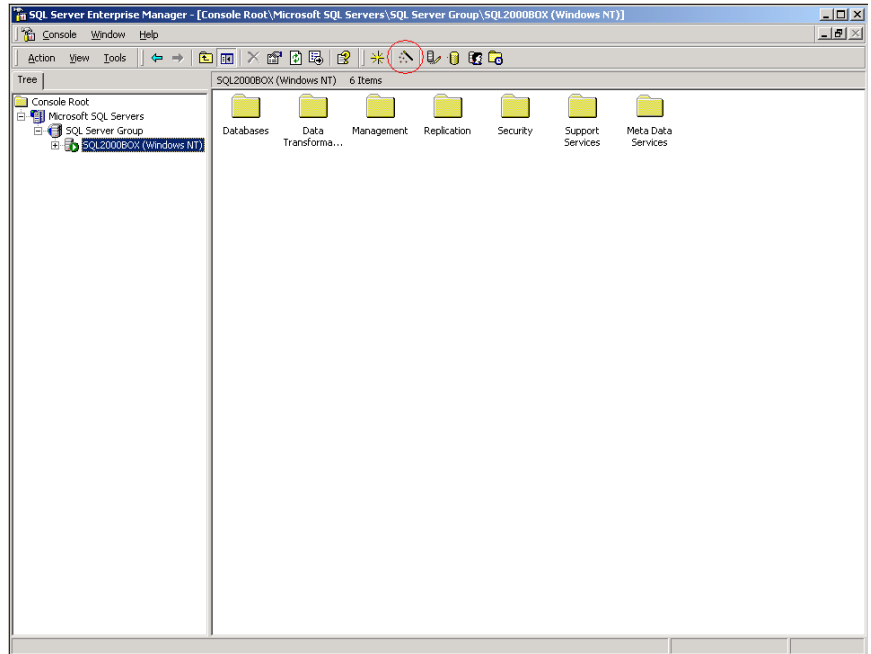
2 In the left pane, navigate to the database to which you would like to add users.

3 Click **Tools>Wizards...** or click the **Run a Wizard** button on the toolbar. This is the button with an image of a wand. The Select Wizard dialog box appears:

4 Click **Database** and select **Create Login Wizard**. Click **OK**. The Create Login Wizard dialog box appears.

5 Click **Next**.

6 Users that are set up in SQL Server can use either Windows NT or SQL Server Authentication.

7 Choose an authentication method:

◆ To use SQL Server Authentication, select the **SQL Server login information that was assigned to me by the system administrator (SQL Server Authentication)** option and click **Next**. The Authentication with SQL Server panel appears.

    a In the **Login ID** field, type the SQL Server login ID for the user that will be used to access the SQL Server. This ID is used to authenticate the user login credentials to the SQL Server database.

    b In the **Password** field, type the password for the user ID entered in the Login ID field. Then retype the user's password in the **Confirm Password** field. Click **Next**.

    c Click **Next**. The Grant Access to Security Roles panel appears.

    d Click **Next**. The Grant Access to Databases panel appears.

    e Click the appropriate check boxes to select the databases to which the user's account is to have access. Click **Next**.

    f Click **Finish**.

◆ To use Windows NT Authentication, select the **Windows account information I use to logon to my computer (Windows authentication)** option and click **Next.** The Authentication With Windows panel appears.

    a Type the domain name and user ID or group name for the user or group you would like to add

    a Select the **Grant access to the server** option. Click **Next**.

    b Click **Next** again.

    c Select the check box for the database(s) to which the users will have access. Click **Next**.

    d Click **Finish.**

8 In the left pane, navigate to the database to which you added users with the Create Login Wizard. Click **Users**.

9 In the right pane, right-click the user ID or group you added with the wizard in the steps above and choose **Properties**. The Database User Properties dialog box appears.

10 Select the **db_datareader** and **db_datawriter** check boxes. Click **OK**.

Creating a New Data Source

You must create a new data source to SQL Server from the workstation that has TestPartner installed. See "Creating a Data Source Name for a SQL Server Database" on page 54 for detailed instructions.

Preparing the SQL Server TestPartner Database

You must prepare your new SQL Server database for use with TestPartner. This section describes how to use the Database Maintenance utility to populate the database with TestPartner tables.

Required: SQL Server Authentication Mode must be set to: SQL Server and Windows (Mixed Mode) to allow connection to the SQL Server database through the Database Maintenance utility. This setting can be changed after any database maintenance tasks are performed.

1 Start TestPartner's Database Maintenance utility.

2 Click **File>New Database>SQL Server**. The SQL Server Data Source Connection dialog box appears.
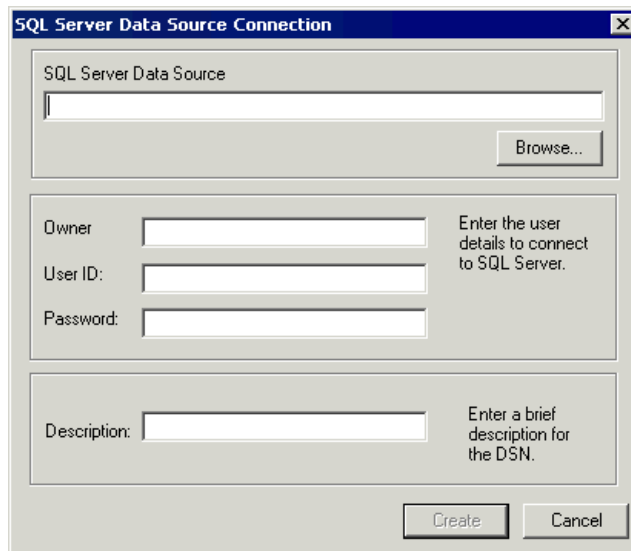
3 Type the name of the new SQL Server data source or click the **Browse** button and select a data source name from the Select ODBC Data Source dialog box. Type the name of the database Owner, the SQL Server User ID, and Password. Click the **Create** button.

Only one schema can be associated with a DSN name (ODBC connection). If the chosen DSN name is already associated with a schema, a Database Maintenance dialog box appears:
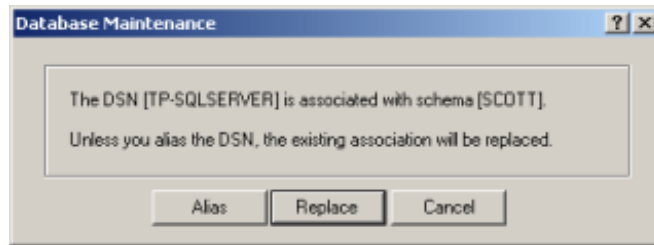
4   Click the **Replace** button to change the association of the DSN name from its current schema to the new schema (users will no longer be able to access TestPartner tables in the old schema), or click the **Alias** button to create an alias for the DSN name, a DSN Alias Creation dialog box appears:

5   Type an alias name for the DSN, this alias will be associated with the current schema. Click **OK**.

The Data Source Creation Status dialog box appears and displays the progress of the database creation.

Log on to TestPartner

To test your setup, start TestPartner and log on. See "Logging On and Starting TestPartner" on page 61 for instructions.

Setting Up an Oracle Database with TestPartner

This section describes how to set up an Oracle database with TestPartner.

Note: The following instructions assume familiarity with the Oracle database management system. Compuware recommends that a database administrator or a person with general knowledge of database administration performs database setup and configuration.

Oracle Database Connection Requirements

Each client computer requires an ODBC data source to connect to the database. As a result, connecting to an Oracle database for TestPartner has the following requirements:

◆ Each computer running TestPartner must be able to access the computer where the database resides.

◆ TestPartner must be installed on all computers that access the database.

◆ The appropriate database client connectivity software must be installed on any computer that runs TestPartner.

◆ The database connection must be configured for use with TestPartner. See "Configuring a TestPartner Database Connection" on page 62.

Selecting an Authentication Method

TestPartner supports the use of either Oracle OS authentication (Windows NT) or Oracle database authentication. There are additional installation procedures required when using Oracle OS authentication. For a complete list of installation procedures required when using either authentication method, refer to the appropriate subsection below.

Oracle OS Authentication

1 "Creating a New Oracle Database" on page 35

2 "Setting Up Oracle OS Authentication" on page 35

3 "Setting Up the Oracle Client" on page 36

4 "Preparing the Oracle Database for Client Connectivity" on page 37

5 "Setting Up Users for TestPartner in Oracle" on page 40

6 "Creating the Password Authenticated Schema" on page 44

7 "Creating a New Data Source" on page 44

Oracle Database Authentication

Creating a New Oracle Database

Create a new Oracle database with character set UTF8 (and National Character Set UTF8 for Oracle 8i). Consult your Oracle documentation if creating an Oracle database is unfamiliar.

Setting Up Oracle OS Authentication

Note: This procedure is only necessary if using Oracle OS authentication. If using Oracle database authentication, see "Setting Up the Oracle Client" on page 36.

On the server where the database is located:

1 Locate the Oracle Initialization file in the directory where Oracle was installed.

2 In the Oracle Initialization file, set values for the following parameters:

Note: If any of these parameters and values do not exist, add them.

```
remote_login_passwordfile = none
remote_os_authent = true
os_authent_prefix = ""
```

3 Locate the SQLNET.ORA file in the directory where Oracle was installed. The file should be located in ORACLE_HOME\Network\Admin directory under the main Oracle installation directory where ORACLE_HOME is the name assigned for the Oracle home during installation.

4 Open SQLNET.ORA and set the value of the following parameter to (NTS):

```
sqlnet.authentication_services = (NTS)
```

Required: Ensure this parameter is not commented out with a # at the beginning of the line.

5   Click **Start>Run**. The Run dialog box appears.

6   In the **Open** field, type regedit. Click **OK**. The Registry Editor dialog box appears.

7   In the path HKEY_LOCAL_MACHINE\SOFTWARE\ORACLE\HOME*n* (where *n* is the number associated with the Oracle installation), right-click HOME*n* and choose **New>String Value**. A new string value appears in the right pane of the registry editor.

8   Replace the default name, New Value #1, with OSAUTH_PREFIX_DOMAIN.

9   Double-click the string value you just created. The Edit String dialog box appears:
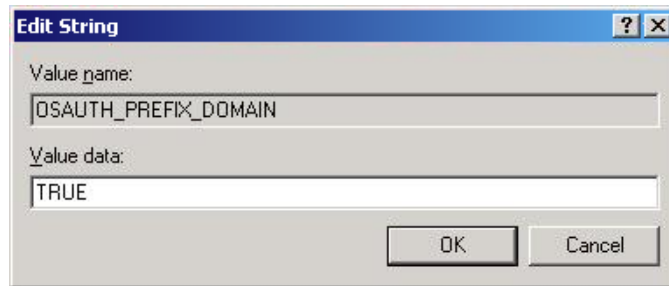
10 In the Value data field, type TRUE. Click **OK**.

Setting Up the Oracle Client

On the client computer from which you will connect:

1   Locate the SQLNET.ORA file in the directory where Oracle was installed. The file should be located in ORACLE_HOME\Network\Admin directory under the main Oracle installation directory where ORACLE_HOME is the name assigned for the Oracle home during installation.

2   Open SQLNET.ORA and set the value of the sqlnet.authentication_services as follows:

Note: If this parameter does not exist, add it.

```
sqlnet.authentication_services = (NTS)
```

> **Required:** Ensure this parameter is not commented out with a # at the beginning of the line.

3   Open the `TNSNAMES.ORA` file in the directory where Oracle was installed. This file should be located in `ORACLE_HOME\Network\Admin` directory.

4   Copy the server's database entry to the `TNSNAMES.ORA` file on the client computer. For example:

```
ORACLE_SID.DOMAIN.COM=
(DESCRIPTION=
(ADDRESS_LIST=
(ADDRESS=(PROTOCOL=TCP)(HOST=SERVERNAME)(PORT=1521))
)
(CONNECT_DATA=
(SERVICE_NAME=ORACLE_SID)
)
)
```

Preparing the Oracle Database for Client Connectivity

Note: This procedure is only necessary if you are using Oracle OS authentication. If you are using Oracle database authentication, see "Setting Up Users for TestPartner in Oracle" on page 40.

Use the following procedure to prepare an Oracle database for client connectivity.

Note: This procedure is only necessary if you are using an Oracle client to set up the TestPartner database.

> **Required:** You must be logged on using an ID with administrator privileges to perform these steps.
>
> You must create users within a Windows NT domain. Refer to your Microsoft Windows documentation for more information about using a Windows domain.
>
> These procedures are for the Windows XP operating system. To set up users in another operating system, consult your Windows documentation.

1   On the computer that has User Manager for Domains, click **Start>Settings>Control Panel**.

2   Select **Administrative Tools**.

3 Select **Computer Management**. The Computer Management utility window appears:
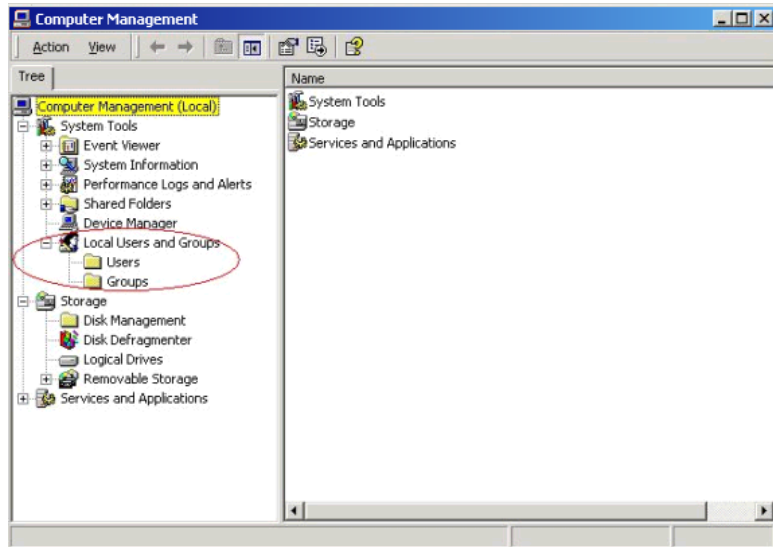
4 In the tree view, click **Local Users and Groups**.

5 Click **Groups**.

If Oracle is installed, you should see a group named **ORA_DBA**. If not, add it using the following procedure:

Creating the
ORA_DBA group:

1 In the tree view of the Computer Management utility, right click **Groups** and choose **New Group**. The New Group dialog box appears.

2 In the **Group Name** field, type ORA_DBA.

3 Click **Create**.

4 Click **Close**.

You are now ready to create server access for users.

Creating Server
Access For Users

To create individual user accounts:

1 In the tree view of the Computer Management utility, click **Local Users and Groups**.

2 Click **Groups**.
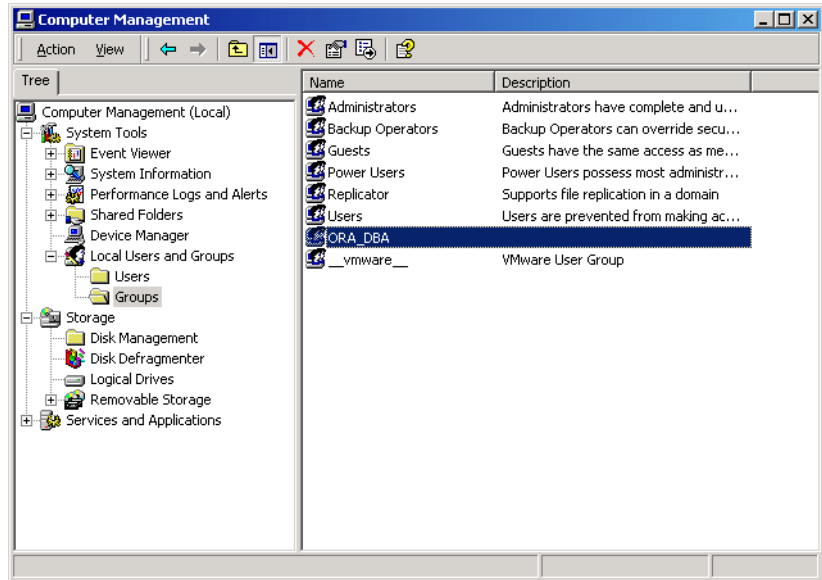
3 In the right pane, double click **ORA_DBA**. The ORA_DBA Properties dialog box appears:
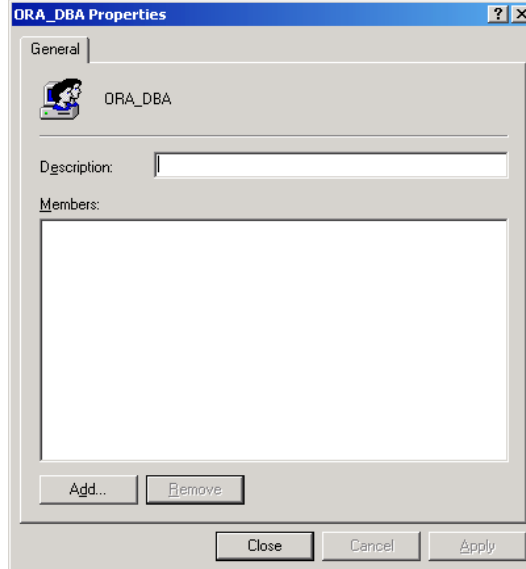
4 Click the **Add** button. The Select Users, Computers, or Groups dialog box appears:
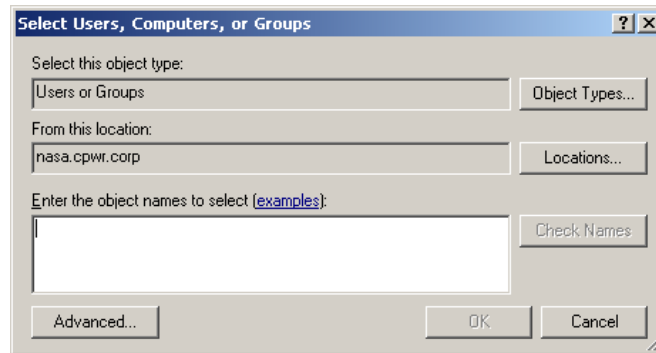
5 Click **Advanced**, then use the Common Queries tab to search for users, click **Find Now** and select users from the list.

Or, click in the **Enter the object names to select** field and type:

`domain name\user ID`

Where:

`domain name:` The name of the domain where the user is located.

`user ID:` The network ID of the user you want to give access to.

6 Click **OK** to save the user information and return to the ORA_DBA Properties dialog box.

7 Repeat step 4–6 to create any additional user accounts.

8 When you are finished, click **OK** in the Users Properties dialog box to return to the Computer Management utility.

Setting Up Users for TestPartner in Oracle

Note: This procedure is necessary when using either Oracle OS authentication or Oracle database authentication. Separate instructions are provided for each type of authentication. For Oracle OS authentication, see the subsection immediately after this note. For Oracle database authentication see the subsection, "Oracle Database Authentication" on page 42.

Oracle OS Authentication

Users must be created in such a way that Oracle knows they are authenticated via a DOMAIN controller.

Required: When setting up users for TestPartner in Oracle, a schema must be also created to house the actual tables in addition to the remotely authenticated users. The schema is not domain authenticated, but is password authenticated. See "Creating the Password Authenticated Schema" on page 44 for instructions.

Users must be created within a Windows NT domain. Refer to your Microsoft Windows documentation for more information about using a Windows domain.

Users must be added to the `ORA_DBA` group.

Use SQL*Plus or SQL*Plus Worksheet to create users. If you are not familiar with SQL*Plus, consult your Oracle documentation.

The user performing these steps must be a member of the `ORA_DBA` group and have `SYSDBA` privileges. To specify users that can access the Oracle database:

1 Start SQL*Plus or SQL*Plus Worksheet.

2 Log on as `SYSTEM` and connect as `SYSDBA`.

3 Type commands to create each user as "`DOMAIN\USERNAME`" `IDEN-TIFIED EXTERNALLY`, and grant connection rights for each user as "`DOMAIN\USERNAME`". Type `DOMAIN\USERNAME` in uppercase and between double quotation marks, where `DOMAIN\USERNAME` is each user's domain and user name. For example:

```
SQL> create user "NT-DOMAIN\JEFF" IDENTIFIED EXTERNALLY;
SQL> grant connect, resource to "NT-DOMAIN\JEFF";
```

Note: SELECT_CATALOG_ROLE must also be granted to the user. For example:

```
SQL> grant select_catalog_role to "NT-DOMAIN\JEFF";
```

Required: Microsoft operating systems return the `DOMAIN\USERNAME` when the user is queried. If this does not match what is defined in the database, NT authentication will fail with ORA-1017.

4 Grant rights to access the V_$SESSION view to individual users or to all users as a public group.

When connecting remotely, use the server name or its alias from the `TNSNAMES.ORA` file with the password.

If typing the command to remotely grant access for individual users, type `DOMAIN\USERNAME` in uppercase and between double quotation marks, where `DOMAIN\USERNAME` is the user name within the domain of each user.

The following shows examples of the commands that are typed for remotely granting access for individual users, and remotely granting access for all users.

Remotely Granting Access for Individual Users

```
SQL>CONNECT SYSTEM/password@ORACLE_SID.DOMAIN.COM AS SYSDBA;
SQL>GRANT SELECT ON "V_$SESSION" TO "NT-DOMAIN\JEFF";
```

Remotely Granting Access for All Users (PUBLIC)

```
SQL>CONNECT SYSTEM/password@ORACLE_SID.DOMAIN.COM AS SYSDBA;
SQL>GRANT SELECT ON "V_$SESSION" TO PUBLIC;
```

Note: If you receive any errors that indicate you cannot grant these rights, or that the V_$SESSION table cannot be found, you are not logged on appropriately.

5 Test that Windows NT authentication is set up correctly by connecting to the database via SQL*Plus. Type a `"/"` for the user name. Leave the **Password** field blank, and enter the host string appropriately. Click **OK**. If you are able to log on, Windows NT authentication is working properly.

Note: In the future, you do not need to create another Oracle TestPartner database to add users. You do not have to perform the procedures "Creating a New Data Source" and "Creating the Oracle TestPartner Database".

Oracle Database Authentication

Use SQL*Plus to create users. If you are not familiar with SQL*Plus, consult your Oracle documentation.

The user performing these steps must be a member of the `ORA_DBA` group and have `SYSDBA` privileges. To specify users that can access the Oracle database:

1 Start SQL*Plus or SQL*Plus Worksheet.

2 Log on as `SYSTEM` and connect as `SYSDBA`.

3 Type commands to create each user as `"USERNAME" IDENTIFIED BY` "`ORACLEPASSWORD`", and grant connection rights for each user as `"USERNAME"`. Type `USERNAME` in uppercase and between double quotation marks, where `DOMAIN\USERNAME` is each user's user name. For example:

```
SQL> create user "JEFF" IDENTIFIED BY "ORACLEPASSWORD";
SQL> grant connect, resource to "JEFF";
```

Note: SELECT_CATALOG_ROLE must also be granted to the user. For example:

```
SQL> grant select_catalog_role to "JEFF";
```

4 Grant rights to access the V_$SESSION view to individual users or to all users as a public group.

Required: All TestPartner users require rights to access the V_$SESSION view. To grant these rights, you must be logged on as a user with administrative rights, e.g., SYSDBA.

When connecting remotely, use the server name or its alias from the `TNSNAMES.ORA` file with the password.

If typing the command to remotely grant access for individual users, type `USERNAME` in uppercase and between double quotation marks, where `USERNAME` is the user name within the domain of each user.

For example, to remotely grant access to individual users:

```
SQL>CONNECT SYSTEM/password@ORACLE_SID.DOMAIN.COM AS SYSDBA;
SQL>GRANT SELECT ON "V_$SESSION" TO "JEFF";
```

To remotely grant access for all users (PUBLIC)

```
SQL>CONNECT SYSTEM/password@ORACLE_SID.DOMAIN.COM AS SYSDBA;
SQL>GRANT SELECT ON "V_$SESSION" TO PUBLIC;
```

Note: If you receive any errors that indicate you cannot grant these rights, or that the V_$SESSION table cannot be found, you are not logged on appropriately.

In the future, you do not need to create another Oracle TestPartner database to add users. You do not have to perform the procedures "Creating a New Data Source" and "Creating the Oracle TestPartner Database".

Creating the Password Authenticated Schema

Perform the following steps to set up the password authenticated schema into which the TestPartner tables are stored.

Note: The password authenticated schema should not be more than five characters in length because of Oracle character limitations in SQL series.

1   Start SQL*Plus or SQL*Plus Worksheet if it is not started.

2   If you are not properly logged on, log on as `SYSTEM` and connect as `SYSDBA`.

3   Type commands to create each user as `"USERNAME" IDENTIFIED AS "ORACLEPASSWORD"`, and grant connection rights for each user as `"USERNAME"`. Type `USERNAME` in uppercase and between double quotation marks, where `USERNAME` is each user's user name. For example:

```
SQL> create user "TOM" IDENTIFIED AS "ORACLEPASSWORD";
SQL> grant connect, resource to "TOM";
```

Creating a New Data Source

You must create a new data source to Oracle. See "Creating a Data Source Name for an Oracle Database" on page 57 for detailed instructions.

Creating the Oracle TestPartner Database

1   Start the Database Maintenance utility.

2   Click **File>New Database>Oracle**. The Oracle Data Source Connection dialog box appears.
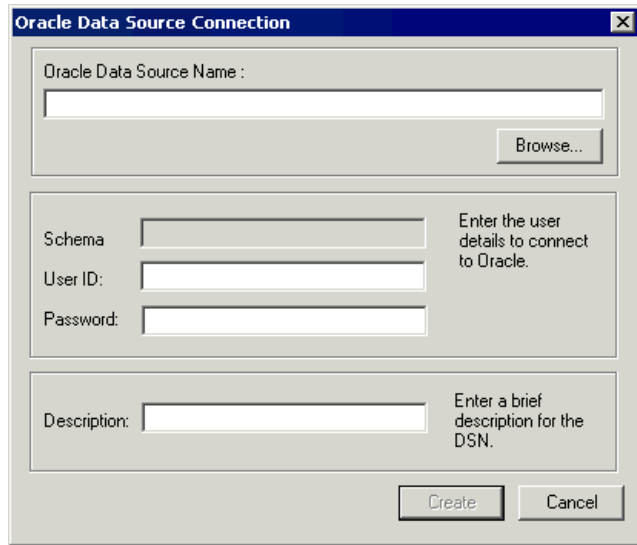
3 Type the name of the new Oracle data source or click the **Browse** button and select a data source name from the Select ODBC Data Source dialog box. Type a User ID, Password, and a brief description of the DSN. The Schema field is filled in automatically with the same information as the User ID. Click the **Create** button.

Note: A table called TP_DSNSCHEMA must exist in the SYSTEM schema. If the table does not already exist in the SYSTEM schema, a System Login dialog box appears, requiring the password for SYSTEM. Type the password, and click **OK**. The table is created.

Only one schema can be associated with a particular DSN name (ODBC connection). If the chosen DSN name is already associated with a schema, a Database Maintenance dialog box appears:
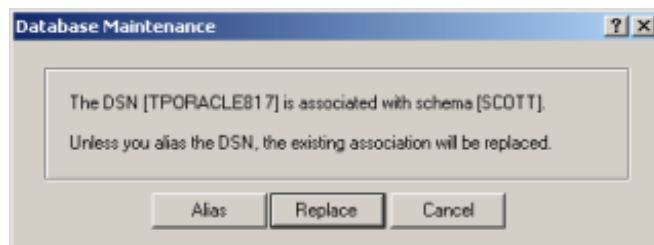
Click the **Replace** button to change the association of the DSN name from its current schema to the new schema (users will no longer be able to access TestPartner tables in the old schema), or click the **Alias** button to create an alias for the DSN name. A DSN Alias Creation dialog box appears:
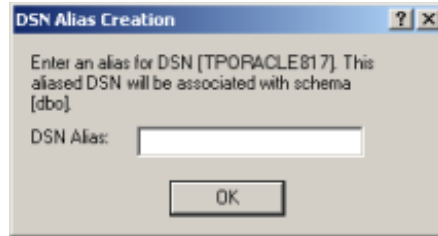
Type an alias name for the DSN, this alias will be associated with the current schema. Click **OK**.

The Data Source Creation Status dialog box appears and displays the progress of the database creation.

Log on to TestPartner

To test your setup, start TestPartner and log on. See "Logging On and Starting TestPartner" on page 61 for instructions.

Setting Up SQL Server or Oracle for TestPartner Without a Domain

Note: This procedure only applies when using Windows NT authentication.

Compuware strongly recommends that you use authentication within a domain when setting up an Oracle or SQL Server database with TestPartner. However, if you are not on a domain, it is still possible to set up these databases.

Required: To begin, you **must** create a user on **both** the client and the server computers.
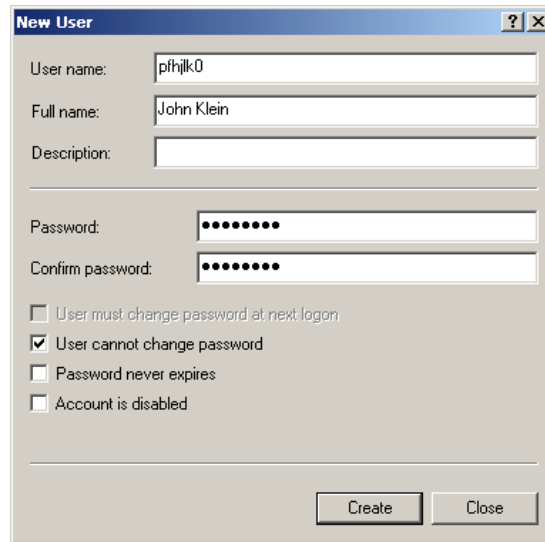
To create a user, follow these procedures:

1 Right-click on **My Computer** and select **Manage**. The Computer Management utility appears.
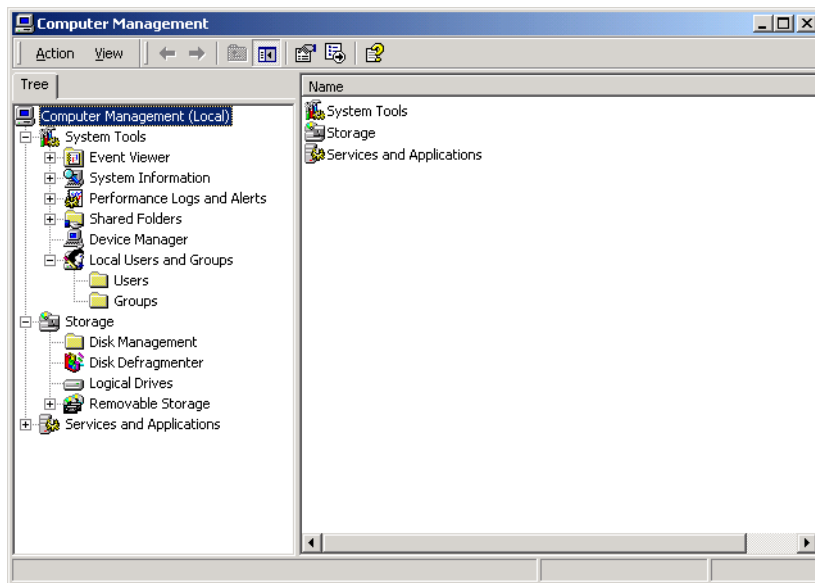
2 In the left pane, click **Local Users and Groups**.

3 Under **Local Users and Groups**, right-click the **Users** folder and select **New User**. The New User dialog box appears:

4 Type a valid user name in the **User name** field, and the corresponding user's full name in the Full Name field.

5 Type a valid password in both the **Password** and **Confirm** password fields. Click the **Create** button.

6 Repeat these steps on each client computer using the username and password.

Setting Up SQL Server for TestPartner without a Domain

To set up SQL Server for TestPartner without a domain:

1 On the server computer, right-click on **My Computer** and select **Manage**. The Computer Management utility appears.
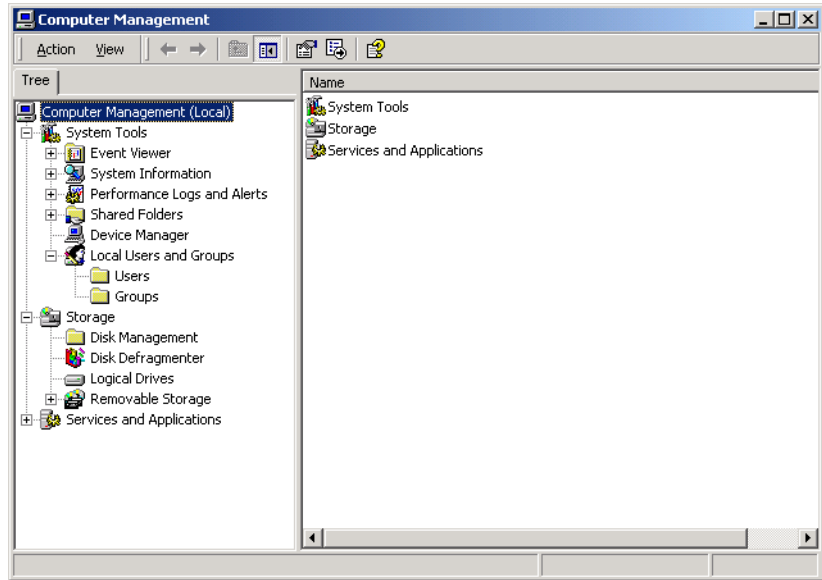
2 In the tree view, click **Local Users and Groups**.

3 Click **Groups**.
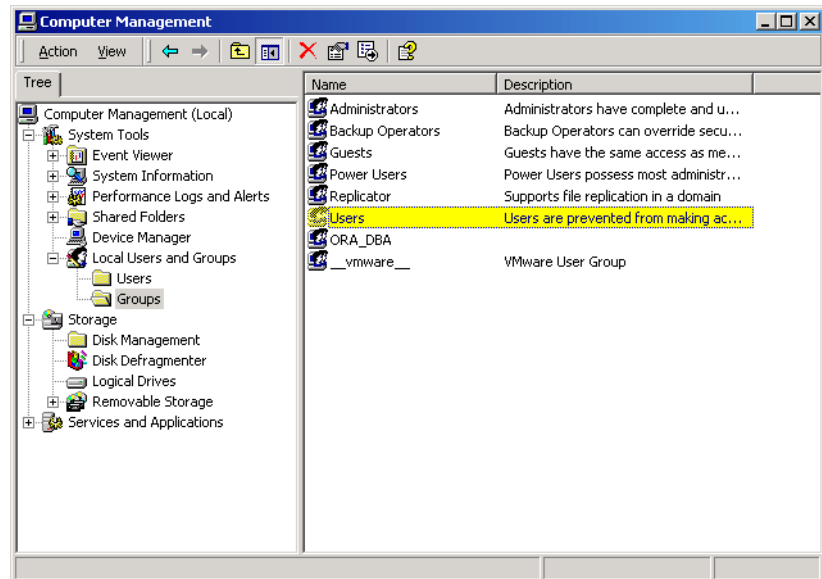
4 In the right pane, double click **Users**. The Users Properties dialog box appears:
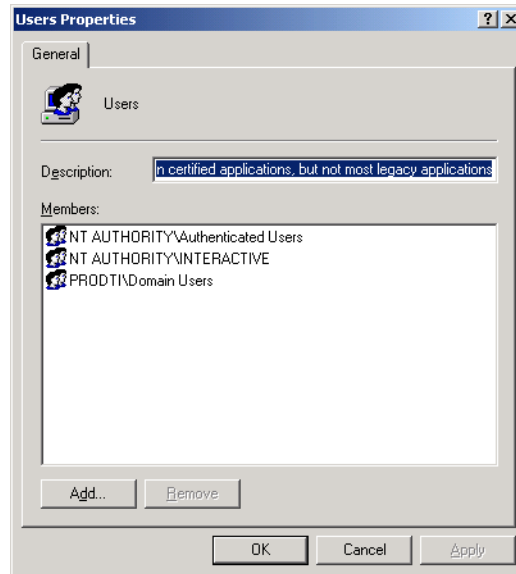
5 Click the **Add** button. The Select Users, Computers, or Groups dialog box appears.
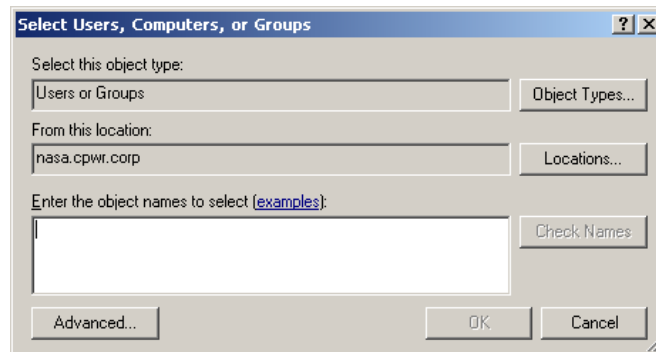
6 Click **Advanced**, then use the Common Queries tab to search for users, click **Find Now** and select users from the list.

Or, click in the **Enter the object names to select** field and type:

[user ID],

where [user ID] is the user you want to give access to.

7 Click **OK** to save the user information and return to the Users Properties dialog box.

8 Repeat step 5–7 to create any additional user accounts.

9　When you are finished, click **OK** in the Users Properties dialog box to return to the Computer Management utility.

10　Close the Computer Management utility.

Setting Up Oracle for TestPartner without a Domain

To set up Oracle for TestPartner without a domain, follow the procedures for "Creating Server Access For Users" on page 38 with the following exceptions:

Substitute the user name you created under, "Setting Up SQL Server or Oracle for TestPartner Without a Domain" on page 47 as shown in step 1 below:

Figure 2-1. Select Users, Computers, or Groups Dialog Box
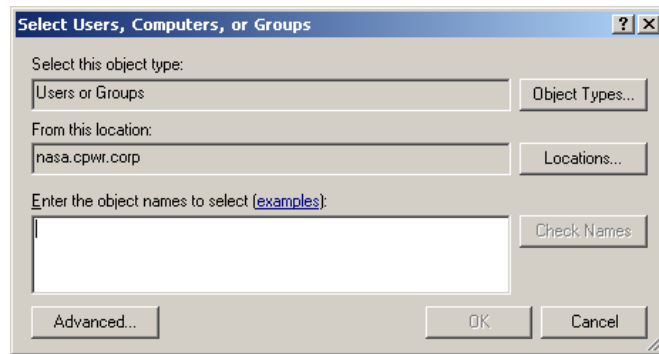
1　Click in the **Enter the object names to select** field (Figure 2-1) and type `[user name]` instead of [domain name]\[user ID] or [domain name]\[group name].

In addition, when using SQL*Plus to create users see step 3 on page 41, substitute *COMPUTERNAME\USERNAME* for *DOMAIN\USERNAME* as shown below:

2　Create the user as `"[COMPUTERNAME]\USERNAME" IDENTIFIED EXTER-NALLY`, entering the *COMPUTERNAME\USERNAME* in uppercase and between "" like the following example:

```
SQL> create user "FH0002RED\USER1" IDENTIFIED EXTERNALLY;
SQL> grant connect, resource to "FH0002RED\USER1";
```

3　Click **Start>Programs>Compuware>TestPartner>Utilities>Database Maintenance**.

4　Grant rights to access the V_$SESSION view to individual users or to all users as a public group.

Open Oracle's SQL*Plus Worksheet. Login as SYSTEM and connect as SYSDBA. You can grant the access rights by entering the commands shown below.

Required: All TestPartner users require rights to access the V_$SESSION view. To grant these rights, you must be logged on as a user with administrative rights, e.g., SYSDBA.

Granting Access for Individual Users
```
SQL>CONNECT SYSTEM/password AS SYSDBA;
SQL>GRANT SELECT ON "V_$SESSION" TO "COMPUTER NAME\JEFF";
```

Granting Access for All Users (PUBLIC)
```
SQL>CONNECT SYSTEM/password AS SYSDBA;
SQL>GRANT SELECT ON "V_$SESSION" TO PUBLIC;
```

Note: If you receive any errors that indicate you cannot grant these rights, or that the V_$SESSION table cannot be found, you are not logged on appropriately.

Creating a Data Source Name

On each computer that is connecting to the TestPartner SQL Server, MSDE, Access or Oracle database, you must create a data source name (DSN) using the ODBC utility if the TestPartner.

Note: This does apply to SQL Server 2005 Express and Access databases installed by the TestPartner installer. For these databases, a data source name is automatically created.

The ODBC utility can be accessed from the Windows Control Panel.

Required: These procedures are for the Windows 2000 operating system. To set up users in another operating system, consult your Windows documentation.

Creating a Data Source Name for an Access Database

On each client computer connecting to an Access database, perform the following steps to set up a DSN:

1 Click **Start>Settings>Control Panel>Administrative Tools>Data Sources (ODBC)**. The ODBC Data Source Administrator dialog box appears.

2 Click the **System DSN** tab, then click the **Add** button. The Create New Data Source dialog box appears:
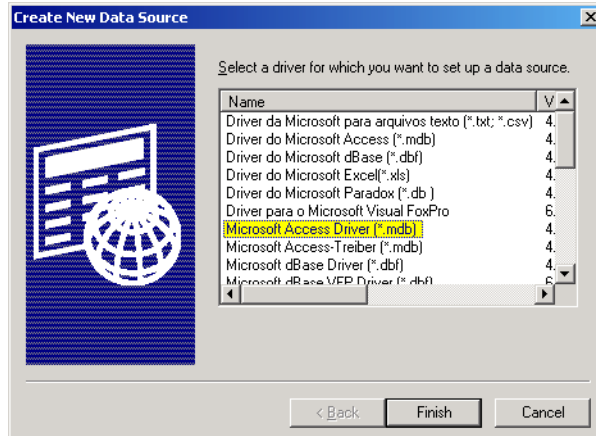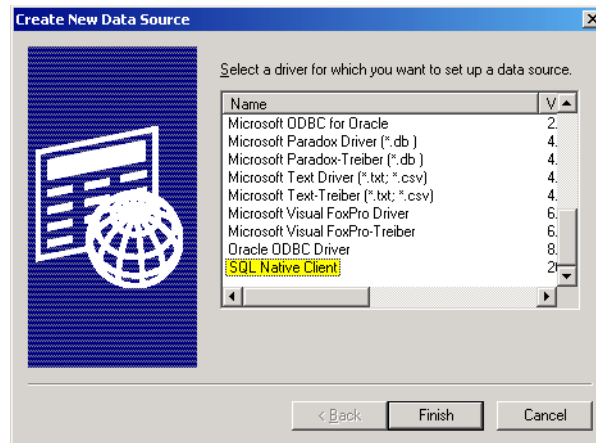

This dialog box lists the available ODBC drivers.

3 From the list of drivers, select the Microsoft Access Driver and click the **Finish** button. The ODBC Microsoft Access Setup dialog box appears.

4 In the **Data Source Name** field, type the data source name. Since this name appears as the database name in TestPartner's logon screen, it is recommended you enter a logical name in this field.

5 In the **Description** field, type a description for the data source. For example, `Connection to TestPartner Access database`.

6 Click the **Select** button and browse for your Access database.

7 On the ODBC Microsoft Access Setup dialog box, click **OK**.

8 Click **OK** on the ODBC Administrator dialog box.

Creating a Data Source Name for a SQL Server Database

On each client computer, perform the following steps to set up a DSN:

1 Click **Start>Settings>Control Panel>Administrative Tools>Data Sources (ODBC)**. The ODBC Data Source Administrator dialog box appears.

2 Click the **System DSN** tab, then click the **Add** button. The Create New Data Source dialog box appears:

This dialog box lists the available ODBC drivers.

3 From the list of drivers, select **SQL Native Client** and click the **Finish** button. The Create a New Data Source to SQL Server dialog box appears.

4 In the **Name** field, enter the data source name. Since this name appears as the database name in TestPartner's logon screen, it is recommended you enter a logical name in this field.

5 In the **Description** field, enter a description for the data source. For example, `Connection to TestPartner SQL database`.

6 In the **Server** field, enter the server name or select it from the dropdown list. If you do not know the server name, consult your database administrator.

7 Click the **Next** button. The Create a New Data Source to SQL Server dialog box appears.

8 Do one of the following:

◇ If user(s) using the DSN to access the SQL Server database are connecting with native authentication, select the **With SQL Server authentication using a login ID and password entered by the user** option.

Make sure the Connect to SQL Server to obtain the default settings for the additional configuration options check box is selected.

Type the users native SQL Server logon credentials in the Login ID and Password fields.

or

◇ If user(s) using the DSN to access the SQL Server database are connecting with non-native credentials, select the **With Windows NT authentication using the network login ID** option.

9 Click the **Client Configuration** button. The Add Network Library Configuration dialog box appears:
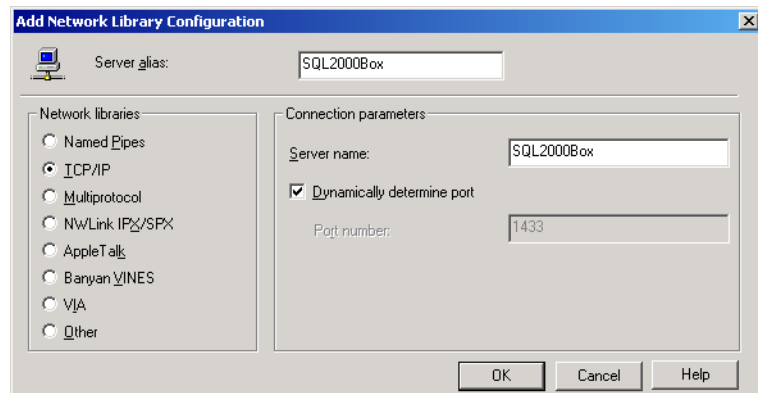
Ensure that the appropriate network library protocol is selected. If necessary, consult your network administrator to verify the correct network protocol.

10 Click **OK** to exit. You are returned to the Create a New Data Source to SQL Server dialog box.

11 Click **Next**.

12 Select the **Change the default database to** check box, then select your TestPartner database name from the drop-down list.

13 Accept all the other entries and click the **Next** button until the last panel in the wizard appears.

14 Accept the defaults and click the **Finish** button. The ODBC Microsoft SQL Server Setup window appears.

Testing the Connection

Once the connection to the database is established, use the following procedure to test the connection:

1 In the ODBC Microsoft SQL Server Setup window, click the **Test Data Source** button. You should see the following:
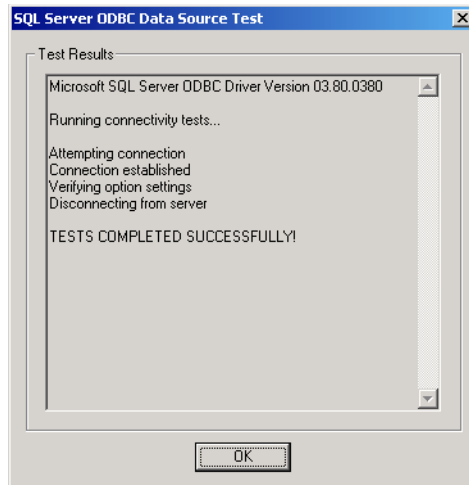

2 Click **OK**. The ODBC Microsoft SQL Server Setup window displays.

Note: If your test results fail, you need to check your setup steps again.

3 Click **OK**. The ODBC Data Source Administrator window displays. The newly created data source appears in the System Data Sources list.

4 Click **OK** to close the ODBC utility.

Creating a Data Source Name for an MSDE Database

Follow the same steps under "Creating a Data Source Name for a SQL Server Database" on page 54, **with the following exceptions**:

◆ In step 3, select **(local)** for the server name.

Figure 2-2. Create a New Data Source to SQL Server
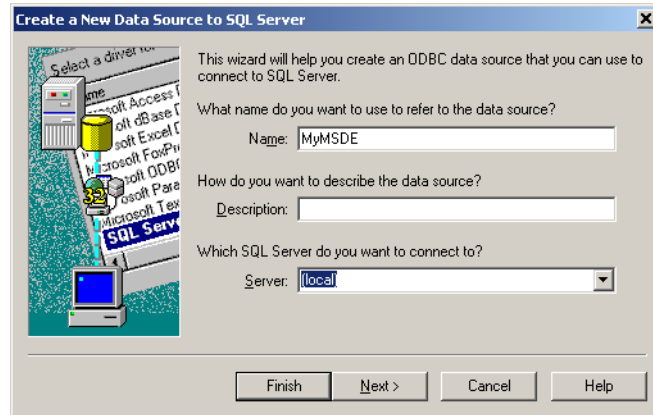
◆ In step 6, a list of databases will be available for selection. However, only the default databases from the MSDE installation will appear in the drop-down list. If you wish to create your own database for MSDE, you must use a front-end interface such as Enterprise Manager.

Creating a Data Source Name for an Oracle Database

On each client computer connecting to an Oracle database, perform the following steps to set up a DSN:

1 Click **Start>Settings>Control Panel>Administrative Tools>Data Sources (ODBC)**. The ODBC Data Source Administrator dialog box appears.

2 Click the **System DSN** tab, then click the **Add** button. The Create New Data Source dialog box appears:
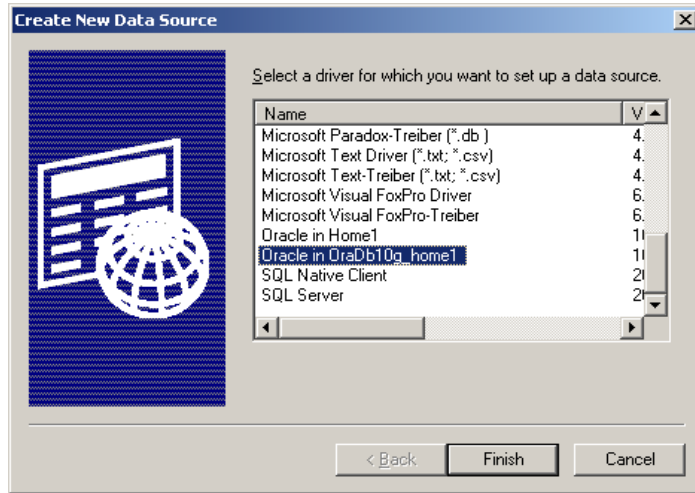
3 From the list of drivers, select the appropriate Oracle ODBC driver for the version of Oracle database being used (not the Microsoft ODBC for Oracle driver) and click the **Finish** button.

The Oracle ODBC Driver Configuration dialog box appears. The following shows this dialog box for Oracle 10.2.0.
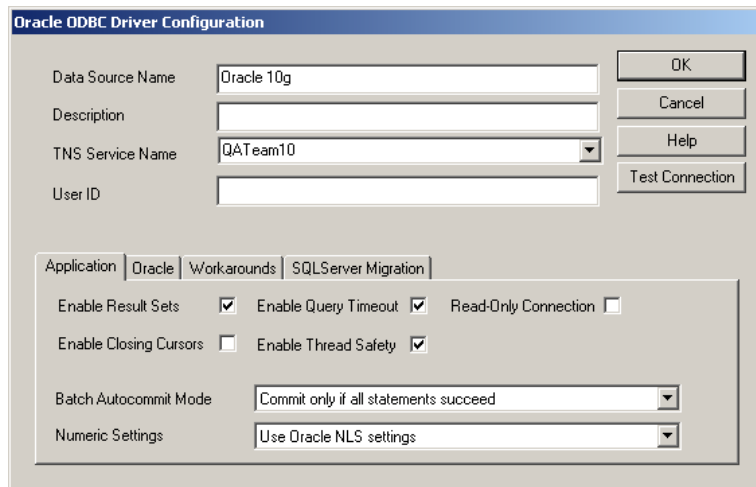
4 In the **Data Source Name** field, type the data source name. Since this name appears as the database name in TestPartner's logon screen, it is recommended you enter a logical name in this field.

5 In the **Description** field, type a description for the data source. For example, `Connection to TestPartner Oracle database`.

6 In the **TNS Service Name** field, select the service name for the database you would like to connect to in the format `ORACLE_SID.DOMAIN`, where `ORACLE_SID` is the Oracle SID you assigned to the database upon creation and `domain` is the domain that you are connecting to.

7 If using Oracle authentication, type a valid user ID for the database being connected to in the **User ID** field. Otherwise, leave the **User ID** field blank.

8 Test the connection. See "Testing the Connection" below. Otherwise, click **OK**.

Testing the Connection

1 On the Oracle ODBC Driver Configuration dialog box, click the **Test Connection** button.

Note: When using Oracle database authentication, type a username, and then a password. For Oracle OS authentication, do not specify a username.

A message box appears stating the connection was successful.

2 Click **OK** to close the message box. The Data Source name creation is complete.

Migrating TestPartner Objects from a Standard Character Set to UTF8 (for Unicode)

Compuware recommends that an Oracle DBA or someone familiar with Oracle export and import utilities perform the following task. For databases larger than 2GB, the DBA should select appropriate parameters based on the size of the database.

Oracle databases for TestPartner releases 05.03 and later require a UTF8 character set. In order to support a TestPartner database previously created in an Oracle instance with a standard character set, the database must be exported from the standard database and imported into an Oracle instance created with a UTF8 character set.

Caution: If the schema from which the TestPartner objects are being exported contains more than just TestPartner objects, it is recommended (required if the schema is SYSTEM) that the TestPartner objects be transferred to a new schema using the TestPartner Database Maintenance Utility 05.02.00 (or older) Oracle-to-Oracle Copy Utility. The objects can be then exported from the new schema.

To perform the migration:

1 Start a command prompt and change the directory to `$ORACLE_HOME/bin`. This directory should contain both exp.exe and imp.exe. Exp.exe will be used to perform the export, imp.exe will be used to perform the import.

Caution: Before exporting, be sure there is sufficient disk space. If there is not enough space, export will end in a write failure.

2 Type `SET ORACLE_SID=MYSID` into the command prompt, where MYSID is the SID of the Oracle instance, and press **Enter**.

3 Type `EXP USERNAME/PASSWORD FILE=EXPORT.DMP LOG=EXPORT.LOG CONSISTENT=Y` into the command prompt, where *USERNAME* is the name of the schema to export and *PASSWORD* is the password for the schema. Press **Enter** to start the export.

Note: To perform the export without knowing the user's password, instead execute it as the system user. Type `EXP SYSTEM/PASSWORD FILE=EXPORT.DMP LOG=EXPORT.LOG CONSISTENT=Y OWNER=USER1` into the command prompt, where *PASSWORD* in the system user password and *USER1* is the owner of the schema to export.

4   Create a new Oracle database with character set UTF8 (and National Character Set UTF8 for Oracle 8i). Consult your Oracle documentation if creating an Oracle database is unfamiliar.

5   Create a new user in the new Oracle instance and grant them CONNECT, RESOURCE, and SELECT_CATALOG_ROLES privileges.

6   Click **Start>Programs>Compuware>TestPartner>Utilities>Database Maintenance** from the Windows Start menu to start the TestPartner Database Maintenance Utility.

7   Click **Tools>Create UTF8 Migration Database**, the Oracle Data source Connection dialog displays.

8   Browse to the new Oracle instance with the UTF8 character set for the **Oracle Data Source Name** field and fill in the **User ID** and **Password** fields with the new schema (the **Description** field is optional). Click **OK** (steps identical to the steps in Creating the Oracle TestPartner Database may have to be followed in order to complete this step).

9   Return to the command prompt and type `SET ORACLE_SID=MYSID`, where *MYSID* is the SID of the UTF8 Oracle instance, and press **Enter**.

10   Type `IMP USERNAME/PASSWORD FILE=EXPORT.DMP LOG=IMPORT.LOG IGNORE=Y` into the command prompt, where USERNAME is the name of the schema to import into and PASSWORD is the password for the schema. Press **Enter** to start the import.

Note: To perform the import without knowing the user's password, instead execute it as the system user. Type `IMP SYSTEM/PASSWORD FILE=EXPORT.DMP LOG=IMPORT.LOG FROMUSER=USER1 TOUSER=USER1 IGNORE=Y` into the command prompt, where *PASSWORD* in the system user password and *USER1* is the owner of the schema that was exported and *FROMUSER* and *TOUSER* are identical.

Logging On and Starting TestPartner

Use the following procedure to launch TestPartner and log on to TestPartner.

1   Click **Start>Programs>Compuware>TestPartner>TestPartner**. The TestPartner splash screen appears, followed by the **TestPartner Logon** dialog box.

2   Type a user name in the **User Name** field and type a password in the **Password** field.

If using TestPartner for the first time, an administrative user name and password may be required. The default user name is Admin and the default password is admin. Change this password after logon to prevent unauthorized access.

3   Select the TestPartner database to work with from the **Database** list.

If a database does not appear in the **Database** list, you must configure its database connection for use with TestPartner. To configure a database connection, click the **Configure** buttonTestPartner. See "Configuring a TestPartner Database Connection" on page 62.

4   Click **OK**. The TestPartner Start Screen appears.

Configuring a TestPartner Database Connection

Before you can use a database with TestPartner, its database connection must be configured. The configuration process consists of using the **Configure Data Source** dialog box to perform the following tasks:

◆   Specify the database connection data

◆   Verify the connection to the database

◆   Save the database connection data

All configured database connections appear in the **Database** list on the **TestPartner Logon** dialog box.

You can also use the **Configure Data Source** dialog box to view, edit, and remove any existing configured database connections.

Use the following procedure to configure a TestPartner database connection.

1   Click the **Configure** button on the **TestPartner Logon** dialog box. The **Configure Data Source** dialog box appears.

Figure 2-3. TestPartner's Configure Data Source Dialog Box
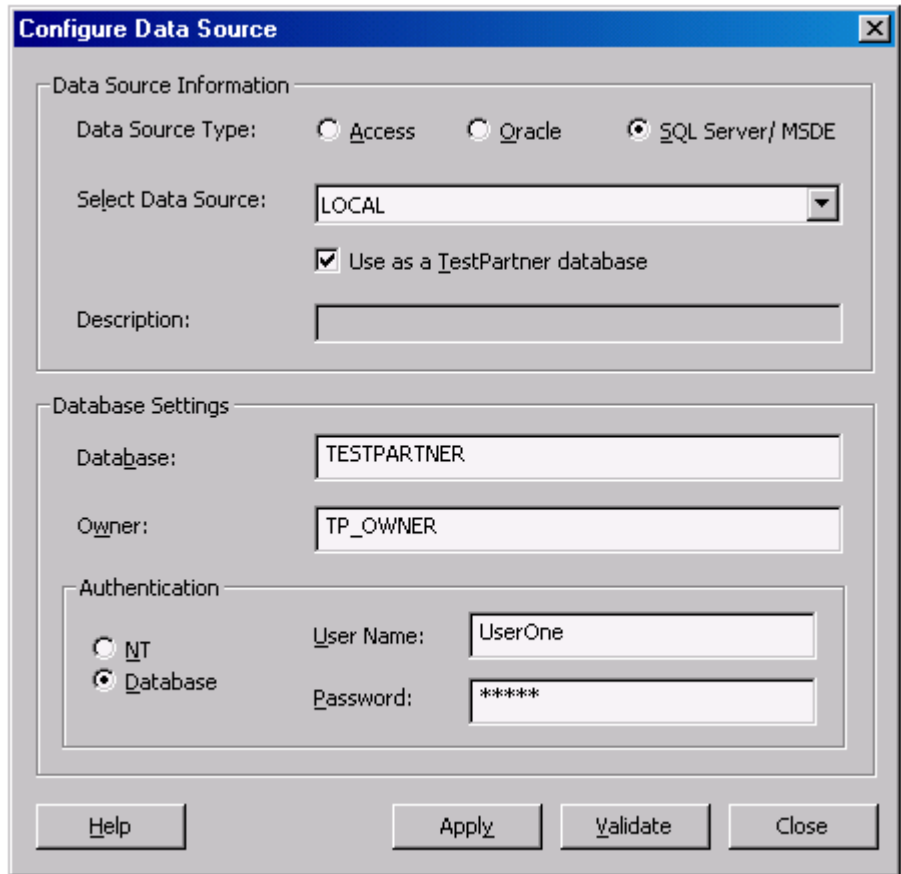
2   In the **Data Source Type** field, select the type of data source.

3   From the **Select Data Source** list, select from the list of available DSNs.

4   Select the **Use as a TestPartner database** check box to add the selected DSN to the list of configured database connections that appear in the **Database** list on **TestPartner Logon** dialog box. You must select this check box when configuring a database connection for the first time.

Note: For existing configured database connections, clearing the **Use as a TestPartner database** check box and clicking the **Apply** button removes the selected DSN from the **Database** list on the **TestPartner Logon** dialog box. TestPartner does not retain the associated database connection data.

5 Under **Database Settings**, specify the appropriate information for the selected DSN. The **Database/Server** and **Owner/Schema** fields function differently depending on the selected data source type.

    a For Access, the **Database** field is read-only and displays the location of the database file. This value is read directly from the ODBC DSN. The other **Database Settings** fields are not applicable for Access and are disabled.

    b For Oracle, the **Server** field is read-only and displays only the database name. This value is read directly from the ODBC DSN. In the **Schema** field, type the appropriate value.

    c For SQL Server, the **Database** field is modifiable and allows you to type the appropriate database name. In the **Owner** field, type the appropriate value.

6 The **Authentication** field determines the method of authentication being used and only applies to Oracle or SQL Server/MSDE databases. You can choose to either use Windows NT authentication or authenticate using the database's native authentication capabilities. When selecting database authentication, you must provide the user name and password in the appropriate fields.

7 Click **Validate** to verify that you can connect to the database using the specified database connection data.

8 Click **Apply** to save the database connection data.

9 Click **Close.**

Chapter 3
Maintaining the Installation

◆ Accessing Maintenance Mode

◆ Modifying an Installation

◆ Repairing an Installation

◆ Removing a Product

Accessing Maintenance Mode

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.

To access Maintenance Mode from the Windows Control Panel:

1   Click the Windows **Start** button and choose **Settings>Control Panel**. The Control Panel window appears.

2   Click the **Add/Remove Programs** icon. The Add/Remove Programs dialog box appears. Select **Compuware TestPartner** and click the **Change** button. The **TestPartner** installation wizard appears and displays the **Welcome** page.

3   Click **Next**. The **Program Maintenance** page appears.

From this page of the wizard, you can access the three maintenance mode options: **Modify**, **Repair**, and **Remove**. For more information about these options, see the appropriate section in this chapter.

Modifying an Installation

Rather than uninstall and re-install the product, you can modify a TestPartner installation by adding or removing an optional component.

Modifying Products With Optional Components

1   Access maintenance mode using the method described at the beginning of this chapter.

2   Select the **Modify** option. Click **Next**. The Select Components dialog box appears allowing you to add or remove components.

3   Click **Next**. Setup adds or removes the appropriate components.

4   After modifying, you may be prompted to restart your computer. If you are prompted to restart your computer, you can choose to restart it now (recommended) or to restart it later.

5   Click **Finish** to complete the maintenance.

Repairing an Installation

There may be times when you need to repair a damaged TestPartner installation. This could be due to an inadvertent deletion or corruption of the program. To repair a TestPartner installation:

1   Access maintenance mode using the method described in "Accessing Maintenance Mode" at the beginning of this chapter.

2   Select the **Repair** option. Click **Next**. Setup repairs the TestPartner installation.

3   After repairing, you may be prompted to restart your computer. If you are prompted to restart the computer, you can choose to restart it now (recommended) or to restart it later.

4   Click **Finish** to complete the maintenance.

Removing a Product

If you want to remove TestPartner installation from your computer, follow these steps:

1   Access maintenance mode using the method described at the beginning of this chapter.

2   Select the **Remove** option. Click **Next**. The **Remove the Program** page appears.

3   Click **Remove**. Setup removes the TestPartner installation, but does not delete the TestPartner database.

4   After uninstalling, you may be prompted to restart your computer. If you are prompted to restart your computer, you may choose to restart it now (recommended) or to restart it later.

5   Click **Finish** to complete the maintenance.

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