



# **SERENA<sup>®</sup>** **DIMENSIONS<sup>®</sup> RM 12.4.1**

**Installation Guide**

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# Preface

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## Objective

The purpose of this manual is to describe how to install Serena® Dimensions® RM, a comprehensive requirements management application that lets development teams capture, engineer, and manage requirements through the entire product life cycle.

## Edition Status

The information in this guide applies to *Release 12.4.1* of Serena® Dimensions® RM. This edition supersedes earlier editions of this manual.

## Audience

This manual is primarily intended for system administrators who are responsible for installing Dimensions RM. It presumes that you have knowledge of the operating systems to which you are installing.

## E-Learning Tutorials

E-Learning tutorials for Dimensions RM can be accessed at the following public Web site:

<http://courseware.serena.com/>

## Typographical Conventions

The following typographical conventions are used in the online manuals and online help. These typographical conventions are used to assist you when using the documentation; they are not meant to contradict or change any standard use of typographical conventions in the various product components or the host operating system.

italics	Introduces new terms that you may not be familiar with and occasionally indicates emphasis.
<b>bold</b>	Emphasizes important information and field names.
UPPERCASE	Indicates keys or key combinations that you can use. For example, press the ENTER key.

monospace	Indicates syntax examples, values that you specify, or results that you receive.
<i>monospaced italics</i>	Indicates names that are placeholders for values you specify; for example, <i>filename</i> .
monospace bold	Indicates the results of an executed command.
vertical rule	Separates menus and their associated commands. For example, select File   Copy means to select Copy from the File menu. Also, indicates mutually exclusive choices in a command syntax line.
brackets []	Indicates optional items. For example, in the following statement: SELECT [DISTINCT] , DISTINCT is an optional keyword.
...	Indicates command arguments that can have more than one value.

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## Contacting Technical Support

Serena provides technical support for all registered users of this product, including limited installation support for the first 30 days. If you need support after that time, contact Serena Support at the following URL and follow the instructions:

<http://support.serena.com>

Language-specific technical support is available during local business hours. For all other hours, technical support is provided in English.

The Serena Support web page can also be used to:

- Report problems and ask questions.
- Obtain up-to-date technical support information, including that shared by our customers via the Web, automatic e-mail notification, newsgroups, and regional user groups.
- Access a knowledge base, which contains how-to information and allows you to search on keywords for technical bulletins.
- Download fix releases for your Serena products.



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# Chapter 1

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## Before Installing

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# Introduction

Serena® Dimensions® RM is a comprehensive requirements management application that lets development teams capture, engineer, and manage requirements through the entire product life cycle.

This guide provides instructions for licensing Dimensions RM, installing and configuring your RDBMS and Administrator Oracle client (where necessary), installing Dimensions RM, and upgrading from previous versions of Dimensions RM, your RDBMS, and Serena License Manager (SLM).

**The instructions in this guide are *principally*** for single-server installations of the Serena Dimensions RM product comprising:

- One of the following Oracle configurations:
  - A 32-bit (Oracle 11gR2) or 64-bit (Oracle 11gR2) Serena-Supplied Runtime RDBMS.



**NOTE** The related *Installing the Serena-Supplied Runtime* guide also describes how to install a Microsoft loopback connector if you are using Dynamic Host Configuration Protocol (DHCP) network addressing.

- Your own 11gR1 RDBMS. (*Note, Oracle 11gR1 is not supported on Windows Server 2008 R2*).
- Your own Oracle 11gR2 RDBMS.
- A pre-installed Serena License Manager (SLM). The installation instructions for this product are provided in the related *Installing the Serena License Manager* guide.
- Pre-installed Microsoft Office (32-bit). For details, see chapter "[Microsoft Office Requirements](#)" on page 22.
- A Dimensions RM server, providing the following components:
  - Web Server.
  - SyncEngine.
  - ALF Emitter.
  - RM Mail Service.
  - RM Web Service.
  - RM Admin clients.



**NOTE** Other installation procedures are also discussed or mapped out in this guide, for example:

- Configurations in which the Serena-Supplied Runtime RDBMS or your own Oracle RDBMS is located on a remote network node.
- Configurations in which an Administrator Oracle client is required.
- Upgrading an existing Dimensions RM server and associated RDBMS (where appropriate).

However, you may want to contact Serena Support for additional help with these more complex installations.

# System Requirements



**IMPORTANT!** For the list of currently supported RDBMS platforms, chip architectures, operating-systems, Web servers, Web browsers, and Serena and third-party integrations, see the Serena Dimensions RM Supported Platforms Web site:

[http://support.serena.com/Roadmap/Product.aspx?sel=RTM\\_12.3](http://support.serena.com/Roadmap/Product.aspx?sel=RTM_12.3)

The following list includes various requirements and notes not otherwise included on the supported platform Web site:

- **UNIX RDBMS** must be installed on a remote UNIX network node.
- **Oracle Administration Client:** You need to pre-install a supported 32-bit Administrator Oracle Client in a different Oracle Home in order to use the following Dimensions RM components:
  - A Dimensions RM server communicating with a *remote* RDBMS.
  - A Dimensions RM server communicating with a local 64-bit Windows RDBMS.
  - A Dimensions RM Admin Client communicating with a Dimensions RM database, no matter where located.
  - Web Server (because this uses the Oracle Call Interface).
  - "Fat" (non-browser) Dimensions RM Windows clients (because these use the Oracle Call Interface).

**NOTE**

- If you have a 32-bit or 64-bit Serena-Supplied Runtime RDBMS installed on the same machine as Dimensions RM, then the required 32-bit Oracle client components will automatically be installed (as can be confirmed by connecting to the database using sqlplus).
- If you have a 64-bit Serena-Supplied Runtime RDBMS installed on the same machine as Dimensions RM, you will normally need to install an additional 32-bit Oracle Administrator Client.
- If you have your own 32-bit Oracle installed on the same machine as Dimensions RM, you should check to see whether the 32-bit Oracle client components are installed by attempting to connect to the database using sqlplus. Install a 32-bit Oracle Administrator client if the connection test shows that it is currently absent.
- If you have your own 64-bit Oracle installed on the same machine as Dimensions RM, you will need to install an additional 32-bit Oracle "Fat" Dimensions RM Windows client (because these use the Oracle Call Interface).
- The release level of the Oracle Administrator client must match that of the RDBMS.
- The 32-bit client path must be first in the Windows PATH variables.
- RM Import Client does not require the Oracle Administrator client (it communicates to Dimensions RM via Web services).
- The type of Oracle client required is Administrator (required for the Dimensions RM import/export functionality).
- The Oracle 11gR1 Administrator Client is not supported on Windows Server 2008 R2 or Windows 7.

See ["Installing and Configuring Your RDBMS and Oracle Client" on page 35](#).

- **Serena License Server:** You must pre-install the Serena License Manager (SLM) if you wish, by default, to fully license your installation of Dimensions RM, rather than exercise the 30-day evaluation option. See the *Installing Serena License Manager* guide and ["Licensing Dimensions RM" on page 25](#).
- **Web Server:**
  - The Web server must be installed on a Windows machine.
  - The Web server uses a 32-bit Oracle Call Interface (OCI) to communicate with Dimensions RM; therefore, a 32-bit Oracle Administrator client must be installed on the same machine as the Web server. If a 32-bit Serena-Supplied Runtime or 32-bit Oracle RDBMS has been installed on the same machine as the Web server, the client components will normally be present as well (as can be confirmed by connecting through sqlplus). For the 64-bit Serena-Supplied Runtime RDBMS or your own 64-bit Oracle, you will, however, normally have to also install a 32-bit client on the Web server machine.
- **RAM/CPU/Disk-Space Recommendations:** See the Readme.
- **Microsoft Office (32-bit):** Including .NET Programmability Support, must be installed on the Dimensions RM server to support browser-based Word import, Document Publishing, RM Import, and RM Import Designer tools. Note the following:
  - A message warns you if you do not have Office installed on your computer.

- For consistent and reproducible use of the Document Publishing, RM Import and RM Import Designer tools, it is advisable to ensure that all users use the same version of Microsoft Office.
- If you import requirements using the Word import feature in the RM Browser client, a 32-bit edition of Word 2007 SP1 or newer, Word 2010 SP1 or newer or Word 2013 must be installed on the server to correctly import graphics from Word documents.
- To be able to view Microsoft Word OLE-linked or embedded attachments when using Dimensions RM Document Publishing, the Windows user concerned must have been assigned administrator rights. This is a general Microsoft Word prerequisite for utilizing OLE-linked or embedded attachments.

For further information, see chapter ["Microsoft Office Requirements"](#) on page 22.

## Planning for the Installation

Serena® Dimensions® RM is a comprehensive requirements management application that lets development teams capture, engineer, and manage requirements through the entire product life cycle.

This guide provides instructions for installing and configuring the RDBMS and Administrator Oracle client (where necessary), installing Dimensions RM, and upgrading from previous versions of Dimensions RM.

The following are a series of checklists to be used for planning and preparing your upgrade or installation.



## Pre-Installation / Planning Checklist

✓	Checklist Item
	<p><b>Supported architectures, Web browsers, Databases, etc.</b></p> <p>For a list of all of the supported server architectures, Web browsers, Databases, etc., please see the Platform Matrix at <a href="http://support.serena.com/Roadmap/Product.aspx?sel=RTM_12.3">http://support.serena.com/Roadmap/Product.aspx?sel=RTM_12.3</a></p>
	<p><b>RAM / CPU / Disk-Space Recommendations</b></p> <p>For recommendations on RAM, CPU power, or Disk space, see the Dimensions RM Readme file.</p>
	<p><b>Serena License Manager and RM Licenses: First Time Install</b></p> <p>If installing a fully licensed release of Dimensions RM, install Serena License Manager (SLM) version 2.2.0 - before installing RM.</p> <p>For evaluations there is a 30-day license option that may be selected during RM installation.</p> <p>See the <i>Installing Serena License Manager Guide</i> and "Licensing Dimensions RM" in the <i>Dimensions RM Installation Guide</i>.</p>
	<p><b>Named Web Service License</b></p> <p>If Dedicated Service accounts are used for Web Services, vs SSO or changing user accounts, a Named License is recommended to ensure a lack of a license does not cause a failure.</p>
	<p><b>Downloading the 12.4.1 release of Dimensions RM</b></p> <p>When downloading the installation zip file, please include the release notes, the readme file, and the associated documentation from the Serena support website. From the release notes and the ReadMe files you will find the most up-to-date list of enhancements and defects corrected in the release. You can't benefit from features you don't know about!</p> <p>Serena support website: <a href="http://support.serena.com">http://support.serena.com</a></p>
	<p><b>32-bit Oracle Administrator Client on Application Server</b></p> <p>An Oracle 32-bit Admin Client must be installed on the Dimensions RM application server. Additional information can be found in chapter "The Administrator Oracle Client" on page 36.</p> <p>When executing the RM installation: <b>the Oracle client path must be first in the Windows PATH variable.</b></p> <p><b>Do not install the 32-bit Oracle client into the default 32-bit Windows programs directory: C:\Program Files(x86)</b></p>
	<p><b>32-bit Oracle Administrator Client on Web Server</b></p> <p>The Web server uses a 32-bit Oracle Call Interface (OCI) to communicate with Dimensions RM; therefore, a 32-bit Oracle Administrator client must be installed on the same machine as the Web server. If a 32-bit Serena-Supplied Runtime or 32-bit Oracle RDBMS has been installed on the same machine as the Web server, the client components should be present as well (as can be confirmed by connecting through sqlplus).</p>

	<p><b>Web Server must be Windows</b></p> <p>The Web server must be installed on a Windows machine.</p>
	<p><b>IPv6 Support</b></p> <p>When operating in an IPv6-only environment, IPv4 must be installed on the server running Dimensions RM. It is not required to enable IPv4 after installing it.</p>
	<p><b>Server Host Names</b></p> <p>The host names of the server computers hosting the Serena-Supplied Runtime or Oracle RDBMS and the Serena License Manager (SLM) have been identified. If a single computer is to be used for all software components, it can host both the Dimensions RM server and client.</p>
	<p><b>LDAP Server</b></p> <p>Although this information can easily be added later, if the organization is intending to use the LDAP login source, identify the LDAP server and port.</p>
	<p><b>32-bit Microsoft Office</b></p> <p>Microsoft Office must be installed on the Dimensions RM server to support browser-based Word import, Document Publishing, RM Import, and RM Import Designer tools. For further information, see chapter "<a href="#">Microsoft Office Requirements</a>" on page 22.</p>
	<p><b>UAC Settings</b></p> <p>The installations of Dimensions RM and Oracle require that the User Account Control settings (UAC) be turned off. This will ensure that the installer has sufficient access to successfully perform all aspects of the installation.</p> <p>More information can be found in chapter "<a href="#">Temporarily Disabling UAC</a>" on page 38.</p>
	<p><b>Tomcat</b></p> <p>RM releases 12.1 and later install with Tomcat. Please check the following:</p> <ol style="list-style-type: none"> <li><b>1</b> Ensure that the RM Tomcat port selected does not conflict with any existing Tomcat installations.</li> <li><b>2</b> The default port is 8080, but an alternate can be specified during installation.</li> </ol> <p>If Dimensions RM is installed on the same server as SBM or Dimensions CM, you must ensure that the Tomcat installed with RM does not conflict with the ports used by SBM and Dimensions CM.</p>
	<p><b>Planning your Dimensions RM user names and Passwords.</b></p> <p>If this is the first time Dimensions RM will be installed, you should plan for your Dimensions RM user names and define a strategy for managing their passwords, especially those for the ICDBA, ICADMIN, and ICPROJECTS accounts.</p> <p>If this is an update, please make sure that you are aware of these passwords.</p>
	<p><b>E-mail Notification</b></p> <p>If installing the e-mail notification service, you must know the name of the computer running the service and the name of the SMTP mail server to be used. This feature may be implemented at any time following the full installation.</p>

	<p><b>Installation folders:</b></p> <p>All examples in this document assume that Dimensions RM will be installed in:</p> <p style="text-align: center;">C:\Program Files (x86)\Serena\Dimensions 12.4.1\RM</p> <p>Early in the installation process an option is provided to change the default location.</p>
	<p><b>Setting RM Project passwords to not expire.</b></p> <p>Once Dimensions RM has been installed and configured, it is important to make sure that the Oracle passwords which were created for the ICDBA, ICADMIN, and ICPROJECTS accounts will not expire. In Oracle 11g, the passwords will expire after 6 months by default. The section "Password Expiration for Oracle 11g Passwords" in Chapter 5 of the <i>Dimensions RM Installation Guide</i> talks about this and provides an example SQL script to set the passwords so they don't expire.</p>

## Additional Plans for Upgrade

✓	<b>Checklist Items for Users Upgrading from a Previous Release</b>
	<p><b>Upgrading the Serena License Manager</b></p> <p>If upgrading from a previous release of RM, please be aware that <b>you must</b> upgrade the Serena License Manager to (SLM) to 2.2.0. RM Release 12.4.1 will not function with an older license manager.</p> <p>See the <i>Installing Serena License Manager Guide</i> and "Licensing Dimensions RM" in the <i>Dimensions RM Installation Guide</i>.</p>
	<p><b>Installing the New Release</b></p> <p>Strictly speaking, there is no "upgrade" mechanism for Dimensions RM; that is to say the projects – the requirement data – will be upgraded to the new release, but the application itself.</p> <p>If this is not the initial installation of RM, <b>the older version must be uninstalled</b> before 12.4.1 can be installed. Before initiating the un-install procedure, copy the following from the current installation tree</p> <ul style="list-style-type: none"> <li>■ The RM folder</li> <li>■ The rtmBrowser folder, if running a release earlier than 12.x this folder will be included with the RM folder backup.</li> </ul>
	<p><b>Must start with 11.2.4.2a or later</b></p> <p>If the current installation of RM is earlier than 11.2.4.2a the release must first be upgraded to 11.2.4.2a (the earliest supported release) before continuing with the with the upgrade to 12.4.1.</p>
	<p><b>32-bit Oracle Administrator Client on Application Server</b></p> <p>An Oracle 32-bit Admin Client must be installed on the Dimensions RM application server. Additional information can be found in <a href="#">"The Administrator Oracle Client" on page 36</a>.</p> <p>When installing RM - including with the upgrade: <b>the Oracle client path must be first in the Windows PATH variable.</b></p> <p><b>Do not install the</b> 32-bit Oracle client into the default 32-bit Windows programs directory: C:\Program Files(x86)</p>
	<p><b>Dimensions RM User Names and Passwords.</b></p> <p>Before initiating the re-installation, make sure that you know the passwords for the ICDBA, ICADMIN, and ICPROJECTS accounts.</p> <p>If these three passwords are not known to you or to a member of the RM team, then re-set them before moving forward with the install.</p>
	<p>If the current release is configured to use RM Mail, see chapter <a href="#">"Record the Dimensions RM Mail Configuration" on page 93</a>.</p>
	<p><b>Schedule RM Work Stoppage</b></p> <p>Each RM Project must be backed-up before the installation is begun. In order to ensure that no changes are applied to RM projects once the backup has started we strongly recommend that the administrator schedule RM downtime and then revoke user access by stopping the RM Pool Manager Service.</p>

**Completing Your Installation**

Once the installation process has finished, the database and projects must be converted/upgraded to the new release. Please pay careful attention to the conversion steps.

## Pre-Installation Requirements

To help ensure that your installation is a success, review the following installation requirements and tips.

### General Requirements

Before you install, make sure that:

- You have worked through the chapter "[Pre-Installation / Planning Checklist](#)" on page 17.
- The host names of the server computers that will host the Serena-Supplied Runtime or Oracle RDBMS and the Serena License Manager (SLM) have been identified. If a single computer is to be used for all software components, it can host both the Dimensions RM server and client.
- When operating in an IPv6-only environment, IPv4 must be installed on the server running Dimensions RM. It is not required to enable IPv4 after installing it.
- For a Dimensions RM client-only installation (and for various other installation configurations), that the requisite Oracle Administrator client has been installed.



**NOTE** The Oracle client path must be first in the Windows PATH variable.

- If you will be installing the e-mail notification service, that you know the name of the computer running the service and the name of the SMTP mail server to be used.
- 32-bit edition of Microsoft Office 2013, 2010 SP1 or newer or 2007 SP1 or newer including .NET Programmability Support is installed on the Dimensions RM server to support Document Publishing, RM Import and RM Import Designer tools. For further information, see chapter "[Microsoft Office Requirements](#)" on page 22.
- No other applications are running.

### Correctly Configuring the Serena-Supplied Runtime or Oracle RDBMS

The Serena-Supplied Runtime or Oracle RDBMS instance must be configured correctly before you install Dimensions RM. Please see "[Installing and Configuring Your RDBMS and Oracle Client](#)" on page 35.

## Oracle 12 Requirements

- Before installation, make sure that the system drive on your computer has default share configured on it. Use the net use command to verify, for example:  
C:\>net use \\hostname\c\$  
Sending this command should return: The command completed successfully.
- Ensure that the current user, the user in the Administrators group, has all the privileges on the default share.
- The database instance **must not** be configured with the *Container database* or *Pluggable Database* (i.e. Multitenant) format. If any of these options is selected, the Dimensions RM installation will fail. The database format can be configured during the Oracle installation process or when creating the database instance.

Please follow the following link to check information about software requirements for Oracle installation [http://docs.oracle.com/database/121/NTCLI/pre\\_install.htm#NTCLI1255](http://docs.oracle.com/database/121/NTCLI/pre_install.htm#NTCLI1255)

## Microsoft Office Requirements

It is **highly recommended** that Microsoft Office is installed on the Dimensions RM server. If Microsoft Office is not installed, Dimensions RM is running with the following limitations:

- DOCX format is not available for publishing. Documents publish to DOC instead.
- PDF format is not available for publishing. Documents publish to DOC instead.
- When publishing to Microsoft Word, the Table of Contents shows page 1 for all chapters.
- Attachments cannot be published.
- Import of Word or Excel files through RM Browser is not available.

**If you want to use Microsoft Office on the Dimensions RM server, the following criteria have to be met:**

- The 32-bit edition of Microsoft Office, including .NET Programmability Support, must be installed.
- Microsoft Office must be any of these versions:
  - Microsoft Office 2013
  - Microsoft Office 2010 SP 1 or newer
  - Microsoft Office 2007 SP 1 or newer  
PDF support requires Microsoft Office 2007 SP 2 or newer.
- You must install Microsoft Word and Microsoft Excel.

## SSO Considerations

Support for Single Sign On requires either an SSO-enabled Serena Business Manager (SBM) or Dimensions CM server installation.

The SBM or Dimensions CM software and documentation can be downloaded from the Serena web site. For information on installing and enabling an SBM or Dimensions CM SSO server, see the *Installation Guide* and *Administrator's Guide* for the relevant product.

**CAUTION!**

- When installing Dimensions RM with SSO, **specify a host name** rather than an IP address. Otherwise SSO may not work correctly with Web applications. The host name **must be exactly the same** you configured for the gatekeeper in SBM or Dimensions CM.
- The Dimensions RM SSO installation changes many configuration files to ensure that SSO performs correctly. It is difficult to perform these configuration changes manually. We recommend that if non-SSO configuration is to be modified to support SSO, you might consider re-installing the product, or check with Serena RM Support for assistance.

**IMPORTANT!**

- The Serena SSO Server component of Dimensions CM or SBM must be installed to a system that is accessible to the RM server.
- The Serena SSO Server must be fully configured and ready to support CAC, LDAP, or any other authentication method you will be using. See the SBM or Dimensions CM documentation for information on installing and configuring a Serena SSO Server.
- If you install Dimensions RM and CM to the same server and enable SSO in RM, then SSO will also be in enabled in Dimensions CM.

**General Prerequisites**

- The Serena SSO Server component of Dimensions CM or SBM must be installed to a system that is accessible to the RM server.
- The Serena SSO Server must be fully configured and ready to support CAC, LDAP, or whatever authentication method you will be using. See the SBM or Dimensions CM documentation for information on installing and configuring a Serena SSO Server.

**Prerequisites for SSO Authentication****Client Prerequisites**

The Dimensions RM SSO software is all server side, so there are no client prerequisites.

### ■ Server Prerequisites

The following information is requested by the Dimensions RM installer. This information can be determined by examining the configuration of your SBM or Dimensions CM SSO server.

Name of field in RM installer	Description
Host Name	The host name or IP address of the computer that hosts your Serena Single Sign On server.
SSO	The HTTP (default = 8085) or HTTPS (default = 8243) port used by the Serena SSO server. <b>NOTE</b> If the specified port is not an HTTPS port, then the <b>Secure (HTTPS) Connection</b> checkbox (see below) <i>must</i> remain unchecked.
Secure (HTTPS) Connection	Enable this checkbox if the Serena SSO Server uses Secure Socket Layer (SSL) communication. <b>NOTE</b> Changing this checkbox will reset the <b>SSO</b> port to the default HTTP or HTTPS port.

### **Prerequisites for SSO with CAC Reader Authentication**

#### ■ Client Prerequisites

The following client side prerequisites are required:

- Installation of Common Access Card (CAC) ActivClient 6.1 or later software. All configuring of the ActivClient client, if necessary, should be performed as described in the vendor documentation. How to log in using CAC and your PIN in the various Dimensions RM clients is described in the Dimensions RM client documentation.
- Each user has a personal CAC.
- A CAC Reader is attached to the client machine.

#### ■ Server Prerequisites

The following information is requested by the Dimensions RM installer. This information can be determined by examining the configuration of your SBM or Dimensions CM SSO server.

Name of field in RM installer	Description
Host Name	The host name or IP address of the computer that hosts your Serena Single Sign On server.
SSO	The HTTP (default = 8085) or HTTPS (default = 8243) port used by the Serena SSO server. <b>NOTE</b> If the specified port is not an HTTPS port, then the <b>Secure (HTTPS) Connection</b> checkbox (see below) <i>must</i> remain unchecked.
Secure (HTTPS) Connection	Enable this checkbox if the Serena SSO Server uses Secure Socket Layer (SSL) communication. <b>NOTE</b> Changing this checkbox will reset the <b>SSO</b> port to the default HTTP or HTTPS port.



## Chapter 2

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# Licensing Dimensions RM

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## About Serena License Manager

The Serena® License Manager (SLM) is the tool you use to obtain and apply the keys that unlock Serena® Dimensions® RM. SLM enables you to centralize your license management across multiple Serena® Dimensions® RM environments. SLM can help you keep track of active licenses and versions of the software in use, for example, you can use it to see whether or not all the licenses are in use or to manually track down who is using what version and license.

If you intend to permanently install Dimensions RM rather than install it for just the default 30-day evaluation period, you will need to pre-install SLM and provide its server name or IP address during Dimensions RM installation (however, if you wish to convert an evaluation copy of Dimensions RM into a fully licensed copy, you can install SLM at a later date). The SLM installer also installs the associated Serena License server.

You can install SLM on the same system as Dimensions RM or install it separately on a dedicated license server. If you have other Serena software products installed on a license server that use a compatible version of SLM, for example Version Manager, you can use that with your Dimensions RM license. For installation instructions see the *Installing Serena License Manager* guide.

There is minimal CPU usage required on the server to run SLM.

## License Manager Considerations

Install the Serena License Manager (SLM) on a central server that all Serena products will be able to access. See the related *Installing the Serena License Manager* guide for local or remote installation instructions. Serena Dimensions RM release 12.4.1 requires the SLM release 2.2.0.

If you are licensing users in different locations and you have relatively slow networks, you may want to install a SLM server and set up the users in each location on the local server computer. When you do so, you need to install SLM to a server in each location. If you have faster networks, you can install SLM on one central network computer and have all Dimensions RM users point to it.



**IMPORTANT!** There should **NOT** be a firewall or router between the SLM server and the RM server.

If that configuration is not possible and/or your network is slow, install SLM and RM to the same server.

## About Dimensions RM Licenses

To use Dimensions RM, you must generate and apply license keys. The following table explains the type of license keys that you can obtain and apply for each component:

License Type	Description
Concurrent	Concurrent licenses, also known as floating licenses, can be used by any user. This is advantageous if you are in an organization spread across multiple time zones or have users who infrequently use Dimensions RM, because multiple people can share the same license.
Named	Named licenses can only be used by specific users. This allows you to limit access to the system to only those users whose login IDs are associated with licenses.

Each RM license purchase comprises the following:

- icEWB license: A license for the client tools, such as RM Import.
- icPWB license: A license for RM Manage and Class Definition.
- icBrowser license: A license for the RM Browser client.

This allows each RM license to be used simultaneously across multiple clients. For example, if there is just one available license, a user will be able to log into both RM Browser and RM Manage, without using multiple licenses.

The nature of the requirements process is best served with concurrent licenses, as there are peaks and valleys along the application lifecycle time line during which different teams will require access to the solution; however it is typical for organizations to maintain at least two named licenses. The general use case for these licenses is to assign them to administrator accounts, thereby ensuring administrator access if all concurrent licenses are in use.

In the general case, named licenses should only be purchased for full time analysts - individuals spending 25-30 hours a week in RM or for the Web Service service account to ensure that the Web Service connections are always served with a license.

## The Licensing Process: Checklist

After downloading and installing Serena License Manager (SLM) version 2.2.0, you may proceed with "Web Fulfillment"; the process of accessing the license keys that will unlock the Dimensions RM product.

<input type="checkbox"/>	Determine the number of Dimensions RM licenses you want to use in your organization.
<input type="checkbox"/>	Contact your sales representative to purchase the licenses for your users or ensure that you have an existing Serena Support contract.
<input type="checkbox"/>	Ensure that you have a valid serial number for Dimensions RM.
<input type="checkbox"/>	Ensure that you registered at the Serena Support Web Site, in order to log in and get your license keys.

<input type="checkbox"/>	Get the license key string from Serena Web fulfillment.
<input type="checkbox"/>	Enter the key string in Serena License Manager. Repeat this step if you have more than one serial number to license.
<input type="checkbox"/>	<i>Named licenses only:</i> Manually set up user IDs if you do <i>not</i> want to use the auto-add feature to enter user IDs into SLM.
<input type="checkbox"/>	Set up notification for licensing issues. If notification is enabled and there is a licensing issue, you will receive an e-mail detailing the problem.
<input type="checkbox"/>	If you need to reboot the SLM server machine or set it to run as a service, restart the Windows SLM server (Start   Programs   Serena   License Manager   Start License Manager Service) or remote UNIX SLM server (run the <code>./start_license_server</code> script in the directory where you installed the license server).

## Licensing Dimensions RM

### Getting and Applying Licenses

#### To get a license from Serena using SLM:

- 1 On Windows, open SLM by selecting Start | Programs | Serena | License Manager 2.2.0 | License Manager.

On remote UNIX, as user root, launch it by navigating to where you installed it and run the script:

```
./serenalm
```



**NOTE** You must ensure that your UNIX search path environment includes the path to the license server process executable `lmgrd`. This executable is located in the directory where the Serena License Server is installed.

Then:

- If you already have a license key from Serena, you can select the **I have received a license key from Serena** option and paste the key string in the field, then proceed to ["Starting the License Server" on page 30](#).
  - If you don't already have a license key, select the **Connect to the web to get a license key** option on the Licensing tab and click the **Get Key(s)** button. The Serena Support Licensing Web site login page appears.
- 2 To obtain the key from the Web fulfillment:
    - a Make sure, first, that you copy your license server host identity, which will be displayed in a "scissors" graphics.
    - b Click **Click here to continue >>**.
    - c Enter your Serena Support account user name and password and log in. If you do not have a Serena Support, you will need to register for one using a valid serial number (if you do not have a valid serial number, contact Serena).

- d The Serena Support Web page appears.
- e Click the Licensing tab or navigate to the following menu item:  
Support | Licensing
- f Select appropriately from the (Licensing) **Site:**, **Product:**, **Serial Number:**, and **Version:** drop down menus.
- g Click **Create Licenses** and follow the instructions presented there to obtain you license key or keys.



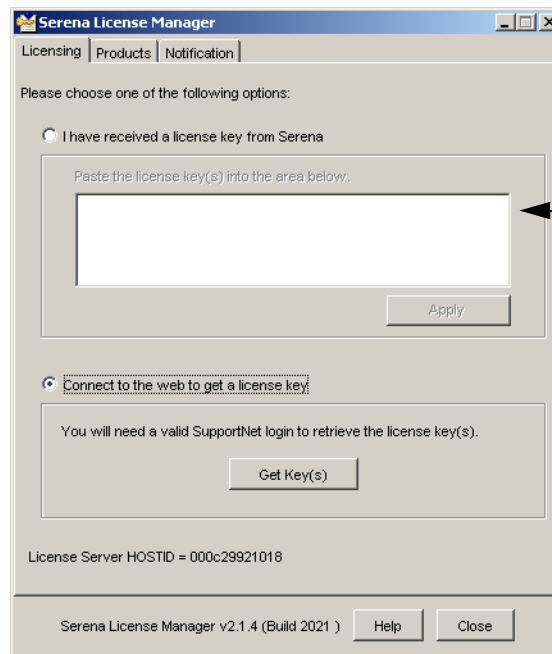
**NOTE** If you require additional help, you can run an Adobe Flash video demo. Click the View Demo sub-tab.

- h Once you have generated a license, electronically copy the entire license string and return to SLM. An e-mail will be sent to you with details of the license keys for your records.



**IMPORTANT!** Make sure that you do not copy any extra spaces or SLM will consider the key invalid.

- 3 On return to the Serena License Manager, select the **I have received a license key from Serena** option and paste the keys (just the FEATURE lines) in the field available. The **Apply** button will then become active.



key string  
copied and  
pasted here

- 4 Click **Apply**. Your license will be activated. You can now:
  - For any Named licenses that you added, add valid user IDs into the license server or set the license server to add in user names automatically before logging into Dimensions RM. See "[Managing User Names for Named Licenses](#)" on page 31.
  - Set up notification for issues with the licenses and license server. See "[Setting Up Notification for Licensing Issues](#)" on page 31.

The license server on Windows will start automatically; if it does not, you can start it manually using Windows Services. On remote UNIX, you will need to start it manually in all cases. See ["Starting the License Server" on page 30](#) for more information.

**To get a license from Serena if your server doesn't have Web access:**

- 1 From a different computer with Web access, connect to the Serena Support Web site. Make sure you know the product serial number and the Host ID of the license server machine so you can enter it in the Web fulfillment system.

You can find your license server machine's Host ID at the bottom of the **Licensing** tab of the Serena License Manager dialog box.

- 2 When you access the Web page with your key string, copy that key string into a text editor. Save and copy that file to a portable disk or a location on the network accessible from the license server machine.
- 3 Insert the portable disk in the license server machine or navigate to where the file is stored on the network. Open the file and copy the key string, select the **I have received a license key from Serena** option, and paste it in the field.

**To get a license from Serena if you don't have Web access at all:**

Contact Serena Support for assistance if you cannot use the Web to obtain a license. See ["Contacting Technical Support" on page 8](#).

## Adding Licenses

If all the licenses you purchased are not already in use, you can add license keys for seats you have already purchased through SLM.

If you run out of purchased license seats to use, contact your sales representative at Serena to purchase additional licenses to add to your serial number.

**To add license keys from your initial purchase:**

- 1 Follow steps listed above in ["To get a license from Serena using SLM:" on page 28](#).
- 2 Click **Apply** to restart the license server.

**To buy more licenses and add them to your pool of licenses:**

Contact your Serena sales representative to purchase additional licenses. Once you have your serial number updated for additional seats, follow the instructions above to obtain additional licenses.

## Starting the License Server

If the license server did not start automatically after you have obtained the licenses, start it before installing other Serena products.

On Windows **To start and stop the license server:**

Start | Programs | Serena | License Manager 2.1.5 | Start License Manager Service

**To stop the license server:**

Start | Programs | Serena | License Manager 2.1.5 | Stop License

## Manager Service

On UNIX **To start the license server on UNIX:**

At a command prompt, as the Dimensions RM System Administrator user not root run:

```
<serena_license_server_dir>/<os>/start_license_server
```

where <serena\_license\_server\_dir>/<os> is the directory in which you installed the Serena License Server, <os> being the platform identifier, for example, aix.

Check the contents of the `SerenaLicenseServer.log` to make sure the service has started correctly.

**To stop the license server:**

At a command prompt, run:

```
<serena_license_server_dir>/<os>/stop_license_server
```

## Managing User Names for Named Licenses

If you have purchased named user licenses, you need to specify the Dimensions RM user IDs and the features they are licensed to use in the SLM before that user can log into Dimensions RM. You can add the users' IDs manually by typing their user IDs or manually by accepting the default in the SLM.

**To manually assign, reassign, or delete from features:**

- 1 On the **Product** tab, select the feature from the **Product Licenses** list and click the **Manage User IDs** button.
- 2 The **User Management** dialog box opens.
  - To add users manually, click **Add User** to add a user to the feature by typing in the user ID. You can add as many users as you like by separating the IDs with a space. The user names you enter here must match the users' Dimensions RM login names.
  - To remove users from the list, select the user from the list and click **Remove User**.

**To automatically assign named licenses to users who request them:**

- On the **Products** tab, select the feature from the **Product Licenses** list and select **Auto-add user IDs for named licenses** to automatically add user IDs to a named license list when users log into Dimensions RM. This option is set by default.

When users log in to a product, the server will check to see if there are licenses available for the feature they are attempting to use. If there is a license available, that user ID will be logged in the license server and that will be the named license assigned to the user.

## Setting Up Notification for Licensing Issues

The **Notification** tab gives you the ability to set up notification from the license server. You need to supply the license server your SMTP server address and e-mail address to be notified of licensing issues by e-mail.

You can also suspend your notifications if the notices come in too frequently. It is also recommended that you set up rules in your e-mail application to funnel the incoming messages to an area where you can monitor them and where they won't interrupt your regular e-mail activity.

You can be notified of conditions such as when:

- You are out of licenses
- Users are requesting licenses that are not on the server
- Users are denied a license because they are not on the named list

**To receive notification of license activity:**

- 1 Enter your SMTP server address in the **SMTP Server IP / Hostname** field.
- 2 Enter your e-mail From address in the **From address** field.
- 3 Enter your e-mail To address in the **To address** field.
- 4 Click **Send e-mail notification of licensing issues** to enable notification.
- 5 Click **Apply Changes**.

**To suspend notification of license activity:**

To put notifications on hold, you can de-select **Send e-mail notification of licensing issues**. Select it again when you are ready to receive notifications.

## Managing Your Licenses and the License Server

After you have installed SLM to obtain a license key for your users, you can later modify your SLM implementation, for example to run the SLM server as a service, or to move the SLM server.

### **Running the License Server as a Service**

When the SLM installation is complete, the option to set the run the license server as a service is set by default. When the license server runs as a service the license server will restart automatically when you reboot the machine.

Should you need to stop and restart the service you do so in the `lmttools` utility.

**To run the license server as a service:**

- On Windows
- 1 Go to the directory where you installed SLM and double click `lmttools.exe`.
  - 2 Click the Config Services tab and select the **Use Services** check box. If you want the service to be automatic, select the **Start Server at Power Up** check box.
- On UNIX
- If you are using the license server on remote UNIX, refer to the *FLEXlm User's Guide (enduser.pdf)* located in the `./doc/FLEXlm User's Guide` sub-directory of the directory where you installed SLM. This third-party document will guide you through the commands necessary for checking the server status and running it as a service.



## Moving the License Server

If you need to move the license server to a new machine, you must contact Serena Support for assistance. See "[Contacting Technical Support](#)" on page 8.

## Upgrading from an Evaluation License

If you installed Dimensions RM and used an evaluation license, it is good for 30 days. After that period, you need to upgrade the evaluation license to a permanent license.



**NOTE** You must perform this procedure *only* if you evaluated Dimensions RM without an SLM server. If you were already using SLM (for example, with an extended evaluation that included a temporary license key), all that you need to do is add the permanent license keys.

### To upgrade to a permanent license:

- 1 Set up SLM and get a permanent license key.
- 2 In RM Manage, select **Options** from the **Workspace** menu.
- 3 Click the **License** tab.
- 4 Type the name of the license server in the **License Server** field.
- 5 Click **OK**.

## Upgrading Your Serena License Manager

Dimensions RM 12.4.1 requires SLM Version 2.2.0. To upgrade from any previous version of SLM to this requirement version, please proceed as follows:

- 1 Shut down your existing version of SLM.
- 2 Back up the following files in the existing SLM installation directory:
  - Windows
    - merant.opt (if you created such a file)
    - serena.lic
  - UNIX
    - licmgr.ini
    - merant.opt (if you created such a file)
    - serena.lic
    - users.lst
- 3 Uninstall the existing SLM using **Add or Remove Programs** in the Control Panel.
- 4 Install the new version of SLM, see *Installing the Serena License Manager*.
- 5 Restore the files in [Step 2](#) to the new SLM installation directory and start SLM.

## Setting Up Redundant License Manager Servers

To help ensure that licenses are always available in case the SLM server fails, you can set up redundant SLM servers. In this scenario, if one of the servers fails or loses network connectivity, the remaining servers will still supply the licenses to users to ensure that they can log in.

To set up redundant servers, you must:

### **Request redundant server license keys from Serena Support Sales.**

Redundant server license keys enable special licenses that redundant servers can share. With these keys, each of the three servers shares common license information, enabling the servers to back each other up should one go down.

When you receive redundant server license keys, you also receive detailed instructions on how to set up the redundant servers and on how to install and use the keys.

### **Install the License Manager server to three separate systems.**

These systems must have continuous, reliable, high quality network connectivity to each other. If one of the servers becomes unavailable, the remaining two will supply the licenses. If two of the three servers become unavailable, no licenses will be supplied.

## After Setting Up the Licenses

After getting and setting up licenses, you are ready to start using Dimensions RM with SLM. If you have not already done so, proceed with installing Dimensions RM (see chapter "[Installation Types](#)" on page 48). Make sure that the users responsible for installing Dimensions RM know the name or IP address of the SLM server so they can successfully complete their Dimensions RM installation.

## Chapter 3

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# Installing and Configuring Your RDBMS and Oracle Client

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# Oracle System Requirements

## Supported Oracle Versions

The Dimensions RM server requires database connectivity to one of the following supported RDBMS (in which it locates its databases):



**IMPORTANT!** For the list of currently supported RDBMS platforms, chip architectures, operating-systems, Web servers, Web browsers, and Serena and third-party integrations, see the Serena Dimensions RM Platform Matrix on the Support Download page:

<http://support.serena.com/Download/Default.aspx>



**NOTE** The Dimensions RM server (and all other Dimensions RM components) are 32-bit applications that can be run on either a 32-bit or 64-bit Windows platform.

- A 32-bit Windows Serena-Supplied Runtime RDBMS (based on Oracle 11gR2 Standard Edition). This can be located on either the same network node as the Dimensions RM server or a remote network node.
- A 32-bit UNIX Serena-Supplied Runtime RDBMS (based on Oracle 11gR2 Standard Edition). This can only be located on a network node remote from the Dimensions RM server.
- A 32-bit or 64-bit Windows Serena-Supplied Runtime RDBMS (based on Oracle 11g2 Standard Edition). This can be located on either the same network node as the Dimensions RM server or a remote network node.
- A 64-bit UNIX Serena-Supplied Runtime RDBMS (based on Oracle 11gR2 Standard Edition). This can only be located on a network node remote from the Dimensions RM server.
- Your own 32-bit or 64-bit Windows Oracle Standard or Enterprise 11g2 or 12 (Note *11gR1 is not supported on 32-bit Window Server 2008 or on Windows Server 2008 R2*). This can be located on either the same network node as the Dimensions RM server or a remote network node.
- Your own 32-bit or 64-bit UNIX Oracle Standard or Enterprise 11gR2 or 12. This can only be located on a network node remote from the Dimensions RM server.

## The Administrator Oracle Client

A 32-bit Oracle Administrator Client, consistent with the release level of the RDBMS must be installed in a different Oracle Home in order to use the following Dimensions RM components:

- A Dimensions RM server communicating with a remote 32-bit or 64-bit Windows or 32-bit UNIX RDBMS.
- A Dimensions RM server communicating with a local 64-bit Windows RDBMS.
- A Dimensions RM Admin Client communicating with a Dimensions RM database.
- Web Server (because this uses Oracle Call Interface).

**NOTE**

- If you have a 32-bit Serena-Supplied Runtime RDBMS installed on the same machine as Dimensions RM, then the required 32-bit Administrator Oracle client components will automatically be installed (as can be confirmed by connecting to the database using sqlplus).
- If you have a 64-bit Serena-Supplied Runtime RDBMS installed on the same machine as Dimensions RM, you will need to install an additional 32-bit Administrator Oracle client.
- If you have your own 32-bit Oracle installed on the same machine as Dimensions RM, you should check to see whether the 32-bit Oracle client components are installed by attempting to connect to the database using sqlplus. Install a 32-bit Administrator Oracle client if the connection test shows that it is currently absent.
- If you have your own 64-bit Oracle installed on the same machine as Dimensions RM, you will need to install an additional 32-bit Administrator Oracle client.
- The release levels of the Oracle client must match that of the RDBMS.
- The 32-bit client path must be first in the Windows PATH variable.
- RM Import Client does not require the Oracle client (it communicates to Dimensions RM via Web services).
- The Oracle 11gR1 Administrator Client is not supported on Windows Server 2008 R2 or Windows 7.



**TIP** Oracle provides a client only install. You do not need to do another server installation to obtain the 32-bit Oracle Administrator Client.

## Configuring Oracle

If upgrading to a newer release of RM on a server previously hosting RM, you may proceed directly to [Chapter 6, "Upgrading an Earlier Release of Dimensions RM" on page 91](#).

**NOTE This applies to Oracle ASM users:**

Do not use an ASM controlled folder (ASM folders begin with a '+' ) for backup or for restore. A standard operating system path must be used from RM Manage to backup and restore operations.

### Microsoft Loopback Adapter For a Windows RDBMS

Many Windows networked systems implement Dynamic Host Configuration Protocol (DHCP) to assign dynamic IP addresses on a computer network. Dynamic addressing allows a computer to have a different IP address each time it connects to the network. This simplifies network administration by letting you add a new computer to the network without having to manually assign that computer a unique IP address.

The Windows versions of the Serena-Supplied Runtime RDBMS and the Oracle RDBMS, however, require a static IP address. On a DHCP network, the assignment of a static IP address can be achieved by installing a Microsoft Loopback Adapter as the primary adapter. If this is not installed, whenever the DHCP-assigned IP address subsequently changes (for example, at a system reboot), the Oracle Net Listener will no longer work and will have to be recreated using the Oracle Net Configuration Assistant tool.

For instructions on how to install the Microsoft Loopback Adapter, please refer to the related *Installing the Serena-Supplied Runtime RDBMS* guide, or to the Oracle documentation.

## Temporarily Disabling UAC

During testing of Dimensions RM, particularly on Windows Server 2008 during installation of Oracle Enterprise 11gR2, Serena encountered installation problems when installing Oracle when the User Account Control (UAC) security settings *were not the default* for Windows Server 2008. These problems were overcome by temporarily disabling UAC during installation of Oracle Enterprise 11gR2.

If you do not already have a working Oracle 11gR2 RDBMS on Windows Server 2008 and plan to install it for Dimensions RM, you should temporarily disable UAC to ensure that Oracle installs successfully

To turn off UAC, proceed as follows:

- 1 Navigate as follows:

Start | Control Panel | User Accounts

The **User Accounts** page appears.

- 2 Click **Turn User Account Control on or off**.

The **Turn User Account Control On or Off** page appears.

- 3 Uncheck the **Use User Account Control (UAC) to help protect your computer** check box.

- 4 Click **OK**.

A system restart will be needed to implement the change.

Once Oracle 11gR2 RDBMS has been successfully installed, turn UAC back on, by repeating the above procedure but selecting the **Use User Account Control (UAC) to help protect your computer** check box.

## Installing a Serena-Supplied Runtime RDBMS

Instructions for installing the Serena-Supplied runtime are provided in the related *Installing the Serena-Supplied Runtime RDBMS* guide.

For the 32-bit 10g version of the Serena-Supplied Runtime RDBMS, this related guide also includes instructions on how to obtain (from Serena) and apply the Oracle patches

required to bring the RDBMS up to release level 10.2.0.3 (the minimum required for Dimensions RM) or 10.2.0.4 (the preferred release level).



**NOTE** The UNIX Serena-Supplied RDBMS, if used, must be installed on a remote UNIX network node.

### **Serena Supplied Runtime Installation Settings**

The Serena-Supplied Runtime or Oracle RDBMS instance must be configured correctly - as in differently from CM - before Dimensions RM is installed. Please **review** the instructions supplied with the runtime, with the following caveats.

- 1 Please remember to right-click on the executable and select 'Run as administrator' from the drop down.
- 2 On the 'Installation Type' dialog, **uncheck** (as in **do not leave checked**) the box next to 'Create Oracle Instance'. The requirements for creating the RM oracle instance are listed in [Creating the Oracle Database Instance for RM](#), below.
- 3 The SID may be left as is, although you may also change the database SID to a name more obviously related to RM, for example: RMPROD or RMTEST - depending on the reason for creation.
- 4 The Character set (AL32UTF8) should be left as is.

## **Creating the Oracle Database Instance for RM**

The following section applies to both Serena Supplied and corporately owned Oracle Databases. If there are any questions as you proceed through this setup, please contact Serena Support – they will be happy to assist.

The following is the short answer to the question: "How do I create a database instance for RM?" For additional detail, please refer to [The Database Instance Creation Details](#), below.

- 1 Begin by using Oracle Database Configuration Assistant option to 'Create a Database'.
- 2 Select the template for a General Purpose or Transaction Processing Template.
- 3 Use Default settings with the following exceptions:
  - a Memory tab: Enable Automatic Memory Management with at least **2GB** of memory.
  - b Sizing Tab: Increase Processes from 150 to a minimum of 310.
  - c Character sets:
    - NLS\_Characterset AL32UTF8
    - NLS\_NCHAR\_Characterset AL16UTF16
  - d Connection must be DEDICATED.
  - e **Oracle 12:** The database instance **must not** use the *Container database* format.

## The Database Instance Creation Details

### ***NLS\_CHARACTERSET***

<b>NLS_CHARACTERSET</b>	<b>Supported/Unsupported</b>
US ASCII	Unsupported
WE8ISO8859P1	Supported
AL32UTF8	Supported
UTF8	Unsupported
Double-byte	Unsupported

### ***NLS\_NCHAR\_CHARACTERSET***

<b>NLS_NCHAR_CHARACTERSET</b>	<b>Supported/Unsupported</b>
US7 ASCII	Unsupported
AL16UTF16	Supported
UTF8	Supported
Double-byte	Unsupported

### ***NLS\_LANGUAGE***

<b>NLS_LANGUAGE</b>	<b>Supported/Unsupported</b>
American	Supported
All Others	Unsupported

### ***Oracle Client - NLS\_LANG (Windows Registry Setting)***

<b>NLS_LANG</b>	<b>Supported/Unsupported</b>
AMERICAN_AMERICA. WE8MSWIN1252	Supported
All Others	Unsupported

### ***Local Windows Clients Character Set Encoding***

	<b>Supported/Unsupported</b>
Western European (English on English Windows Operating System)	Supported
Western European (English on French Windows Operating System)	Supported
Western European (English on German Windows Operating System)	Supported
All Others	Unsupported



## Browser Character Set Encoding

	Supported/Unsupported
UTF8	Supported
Windows	<b>Supported</b>
All Others	Unsupported

## Memory Management–32 Bit



**NOTE** The following values are not minimum values for Oracle operations but recommended starting points. If you have an Oracle DBA, they should tune these values until they achieve optimum performance for the actual data stored in the Dimensions RM database.

The users referred to in the computations are users simultaneously accessing the server for information.

Attribute	Value to be Set
Shared Memory Management	AUTOMATIC
SGA size	768MB plus 48MB for each simultaneous user over four users
PGA size	256MB plus 16MB for each simultaneous user over four users
1-4 simultaneous users SGA/PGA	SGA 768MB; PGA 256MB
5 simultaneous users SGA/PGA	SGA 1056MB; PGA 272MB
10 simultaneous users SGA/PGA	SGA 1536MB; PGA 352MB
20 simultaneous users SGA/PGA	SGA 1536MB; PGA 512MB

## Memory Management–64 Bit



**NOTE** The following values are not minimum values for Oracle operations but recommended starting points. If you have an Oracle DBA, they should tune these values until they achieve optimum performance for the actual data stored in the Dimensions RM database.

The users referred to in the computations are users simultaneously accessing the server for information.

Attribute	Value to be Set
Shared Memory Management	AUTOMATIC
SGA size	1152MB plus 64MB for each simultaneous user over eight users
PGA size	384MB plus 32MB for each simultaneous user over eight users
1-8 simultaneous users SGA/PGA	SGA 1152MB; PGA 384MB

Attribute	Value to be Set
10 simultaneous users SGA/PGA	SGA 1280MB; PGA 448MB
20 simultaneous users SGA/PGA	SGA 1920MB; PGA 768MB

### Processes



**NOTE** For most systems, 310 processes are adequate; but for large systems a greater number of processes are required. For large systems, if you have an Oracle DBA, they should tune these values until they achieve optimum performance for the actual data stored in the Dimensions RM database.

Category	Number of Processes
Each simultaneous user	At least eight
Each sync engine	At least 20
Each ALF or Mashups service	At least 18
Each RM Mail Service	At least four
All categories	A minimum of 768 (must be a multiple of 32)

### Database Format

The database instance **must not** use the *Container database* format.

## Oracle 32-Bit client Installation

If the Oracle Server is 64-bit or if the Oracle server is running remotely, the Oracle 32-bit client must be installed on the RM application server. Please note that the Oracle client version and patch level should be consistent with that of the server.



**CAUTION!** Do not install the Oracle 32 bit client into the default 32-bit programs directory (C:\Program Files (x86)). If the Oracle client is installed in that directory, Dimensions RM will *not* work.

- 1 Run the Oracle client install (setup.exe) as Administrator, **choosing installation type Administrator.**
- 2 Configure TNSnames
  - a Copy TNSnames file from server to client install path  
For example, from  
... \Oracle\_install\NETWORK\ADMIN\tnsnames.ora  
To  
... \32bitClient\product\11.2.0\client\_1\network\admin\tnsnames.ora
  - b To ensure correctness, modify the 64-bit specific alias:
 

In the dbhome\_1\NETWORK\ADMIN\tnsnames.ora file (as a windows administrator), edit the alias to make it specific to 64-bit Oracle.

In the following example, the alias for rmqp02 in the runtime install directory is changed to rmqp02.64. This allows the RM administrator to recognize immediately that the 64bit tnsnames file has been accessed.

- c For details concerning the editing of the tnsnames file see:

[http://docs.oracle.com/cd/E11882\\_01/network.112/e10835/tnsnames.htm#NETRF007](http://docs.oracle.com/cd/E11882_01/network.112/e10835/tnsnames.htm#NETRF007)

```
RMQP02.64 =
  (DESCRIPTION =
    (ADDRESS = (PROTOCOL = TCP)(HOST = kumquat2)(PORT = 1521))
    (CONNECT_DATA =
      (SERVER = DEDICATED)
      (SERVICE_NAME = RMqp02)
    )
  )
```

- 3 Restart the Oracle TNSListener service.
- 4 **Set the PATH environment variable such that the x32 bit client path appears first (before x64) in the system PATH variable.** This path-setting is necessary for a successful RM Installation

## Completing the Oracle Configuration

### *Deferred Segment Creation*

Oracle 11gR2 added a feature called *deferred segment creation*, which is on by default. This feature results in empty tables not being listed in `dba_segments`. Consequently the Oracle Export utility (`exp`) skips empty table segments by default so that they are not exported at all, even the DLL definitions.

For Oracle 11g, the use of the Oracle Export utility (`exp`) was deprecated by Oracle, instead the Oracle Data Pump export utility (`expdp`) is used for all Oracle backups and the associated `impdp` utility for all associated database imports if you wish to use native Oracle utilities. These Data Pump utilities do not suffer from the above limitation.

Prior to Dimensions RM 11.2.2, the associated RM Manage utilities **Backup/Restore Project Account** and **Create New Project** were also based on the legacy Oracle `exp/imp` utilities. If you plan to backup a project account using pre-Dimensions RM 11.2.2 on Oracle Enterprise 11gR2, therefore, the RM Manage utility **Backup/Restore Project Account** skips empty table segments. This causes an ORA-1950 error and a failure to retrieve a security dump from a Dimensions RM project table when restoring a saved Dimensions RM project (during table import from the saved dump).

The deferred segment creation database feature is controlled by the database parameter `deferred_segment_creation`. It has a default value of `TRUE`. If you set it to `FALSE`, any newly created tables after that change will be exported including empty tables segments.

Consequently, in the above circumstances, before using legacy RM Manage **Backup Project Account** you should set the `deferred_segment_creation` parameter to `FALSE` as described below:

Run the following SQL Plus commands (executed as Oracle SYS account):

```
show system set deferred_segment_creation;  
alter system set deferred_segment_creation=false;
```



**IMPORTANT!** The above change of behavior will be applicable only for new accounts and new tables created in existing accounts.

If a legacy RM Manage Project Backup needs to be taken of an existing Dimensions RM project account, the following SQL Plus command must be executed to fix existing empty tables (again to be executed as Oracle SYS account):

```
declare  
  
begin  
FOR tables in (select table_name from user_tables where num_rows=0)  
LOOP  
EXECUTE IMMEDIATE 'ALTER TABLE ' || tables.table_name || ' ALLOCATE  
EXTENT';  
END LOOP;  
end;  
/
```

### **Turning Off the Anonymous User**

The way in which Oracle authenticates your anonymous user may prevent you from connecting to the database. If the anonymous user does not exist in the domain, turn the authentication service off in Oracle. To do this, modify the `sqlnet.ora` file in the `network\admin` directory as described:

Change:

```
SQLNET.AUTHENTICATION_SERVICES=(NTS)
```

to:

```
SQLNET.AUTHENTICATION_SERVICES=(NONE)
```



**NOTE** This problem can occur when you attempt to populate the Projects list on the RM Browser login page.

## **Setting Up a Local Oracle Net Service Name on the Dimensions RM Server Node**

For a Dimensions RM server installation with respect to a supported remotely located Windows or UNIX Serena-Supplied Runtime or Oracle RDBMS, you will need to provide the Oracle Net Service Name. This is the name that the local Windows Oracle client

networking software uses to identify particular remote Oracle databases for network operations.

On your local Windows node you need to define the Net Service Name of the remote Oracle database that you want the Dimensions RM server to communicate with. To do this you use the Oracle Net Configuration Assistant as explained below:

- 1 Start the Oracle Net Configuration Assistant.
  - For the Serena-Supplied Runtime RDBMS:  
Start | All Programs | Oracle-<oracle\_home> | Configuration and Migration Tools | Net Configuration Assistant  
  
For a default Serena-Supplied Runtime RDBMS installation, <oracle\_home> will be Dimensions or DimOra11.
  - For your own Oracle Enterprise consult your vendor documentation.
- 2 Select **Local Net Service Name configuration** and click **Next**.
- 3 Select **Add** and click **Next**.
- 4 Each Oracle database or service has a service name. Normally this will be its SID. Enter the SID of the *remote* database you want the *local* Oracle client to communicate with and click **Next**.
- 5 Select **TCP** and click **Next**.
- 6 To be able to communicate with the remote database, the local Oracle client needs to know the remote database's hostname. Enter the remote database's hostname. (In most cases you should also accept the standard port number of 1521.) Click **Next**.
- 7 Select **Yes, perform a test** to verify that the remote database can be reached using the information already provided. Click **Next**.
- 8 If the test was successful, you will get the message:  
  
Connecting... Test successful.  
  
If the test fails, you need to repeatedly click **Back** to check that the information you provide and correct it as necessary until this test is successful.  
  
Click **Next**.
- 9 Having tested that your local Oracle client can simply communicate through TCP/IP with the remote database whose service name (SID) you provided in [Step 4 on page 45](#), you now need to assign an Oracle Net Service Name. This net service name is the name that your *local Oracle client* will use to identify the *remote* database when performing locally initiated Oracle services with respect to the *remote* database.  
  
By default the net service name will be the same as the service name you provided in [Step 4 on page 45](#) and the **Net Service Name** field will be pre-populated with that name. However, if that name is not unique, for example, say both the local Oracle client and remote databases have an Oracle SID of DIM10, then you would enter a unique net service name for the local Oracle client to use when communicating with the remote database, for example, DIM10R.  
  
Click **Next**.

- 10** Unless you want to configure another net service name, accept the default **No** and click **Next**.
- 11** Click **Next**.
- 12** Click **Finish**.

## Chapter 4

---

# Installing Dimensions RM

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---

# Installation Types

## Installation Types

The following table describes the three installation options available with the Dimensions RM installer; the server installation installs the admin client and import tools. The installation described in this section is focused primarily on the Server Installation.

Option	Description
Server Installation	This installation type will install the Admin Client, Sync Engine, ALF Emitter Service, RM Pool Service and E-mail Notification Service by default, and will make the RM Browser available to the organization.  It has been stated before, but must be stated again: This option requires Microsoft Office (32-bit).
Admin Client	Choose to install the Admin Client, RM Manage, only. This installation type is selected when making the client available on the administrator's desktop.
RM Import Client	Installs the RM Import client, which is used to import files from Microsoft Office. The Dimensions RM components installed are:  This option requires Microsoft Office (32-bit), otherwise RM Import will not be available for installation.

## Final Checks



**IMPORTANT!** Before continuing with the section, please be sure that you have read and completed tasks described in chapter. This includes a review of the checklist, as well as considerations for SSO and Oracle.

### The Following are Assumptions: no action needed:

- 1 Stable OS and Oracle Server
- 2 Serena License Manager (SLM) installed with RM Licenses, unless planning to use the 30-day evaluation.
- 3 32-bit Microsoft Office (Word, Excel, Office tools) has been installed – on the server
- 4 System Administrator access

The installation must be **Run As Administrator**

- If the individual performing the installation does not have privileges – find someone who does.
- The installation updates the registry, full administrator privileges are absolutely necessary for a successful installation.



- 5 The following examples assume that the product will be installed in:

C:\Program Files\Serena\Dimensions 12.4.1\RM

Browse to a different installation folder if desired and note the path difference as you follow the instructions.

## One More Tomcat Reminder



**IMPORTANT!** All Dimensions RM releases following 12.1.x install with Tomcat – please check the following before proceeding.

- 1 Ensure that the RM Tomcat port selected does not conflict with any existing Tomcat installations.
- 2 The default port is 8080, but an alternate can be specified during installation.

## Installing on Windows Server 2012 R2

This chapter describes the steps to take before installing Dimensions RM on Windows Server 2012 R2.

- 1 Open a command prompt.
- 2 Type `secpol.msc` and hit Enter. This opens the local *Security Policy Management Console*.
- 3 Open the **Local Policies** folder.
- 4 Select the **Security Options** folder.
- 5 Locate the item **User Account Control: Admin Approval Mode for the Built-in Administrator account** and double-click it.
- 6 Set the value to **Disabled**.
- 7 Click the **OK** button.
- 8 Locate the item **User Account Control: Run all administrators in Admin Approval Mode**.
- 9 Set the value to **Disabled**.
- 10 If you plan to install Dimensions RM with RM Import, execute the following steps:
  - a Open *Server Manager*.
  - b Click on **Next** until **Features** is selected.
  - c In the **Features** list, open **.NET Framework 3.5 Features**.
  - d Select **.NET Framework 3.5 (includes .NET 2.0 and 3.0)**.
  - e Click on **Next**.

- f Click on **Install**.

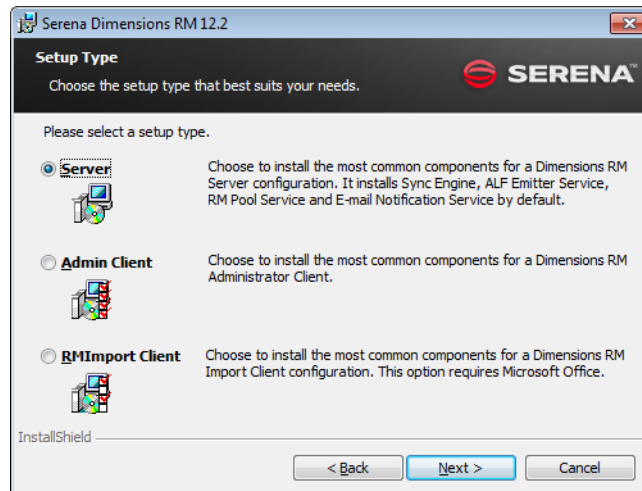


**NOTE** RM Import requires Microsoft Office 2007 (32-bit) or higher to be installed. If you are installing Microsoft Office, also see chapter "[Support for Publishing / Word Import](#)" on page 60.

- 11 Restart the computer.

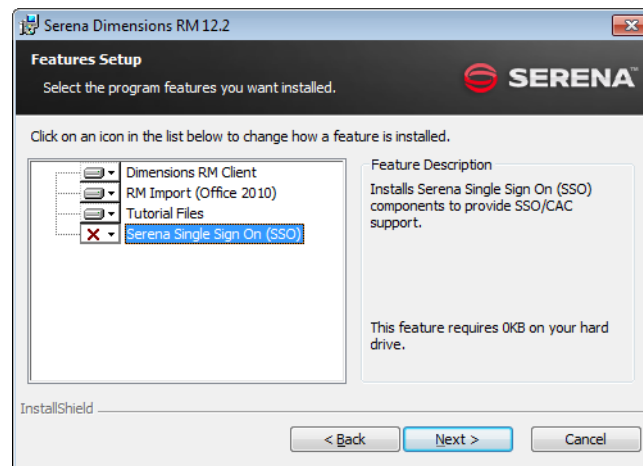
## Running Setup.exe

- 1 From the downloaded release package, right-click on the file: setup.exe and choose **Run as administrator** from the context menu.
- 2 Accept the license agreement.
- 3 Select the **Server** installation.

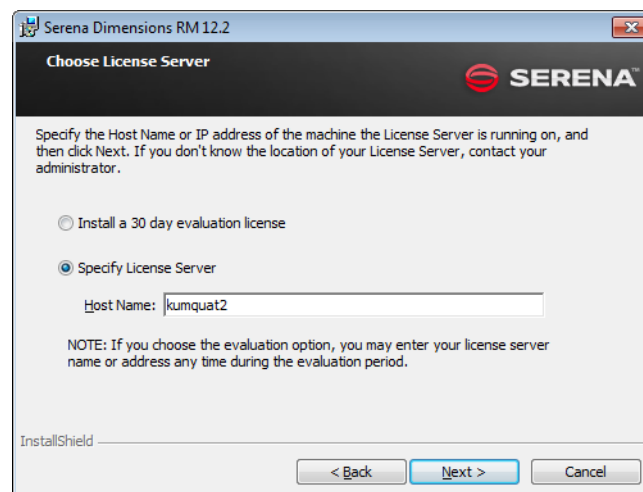


- 4 In the features setup dialog, choose the items that should **not** be installed. When running a server install – the only option is whether or not to include Single Sign On; in the example below Single Sign On (SSO) will not be installed.

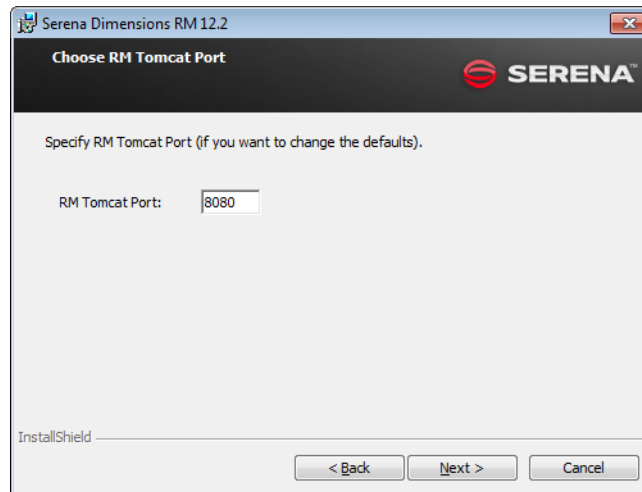
Please note that SSO requires either an SBM or CM installation.



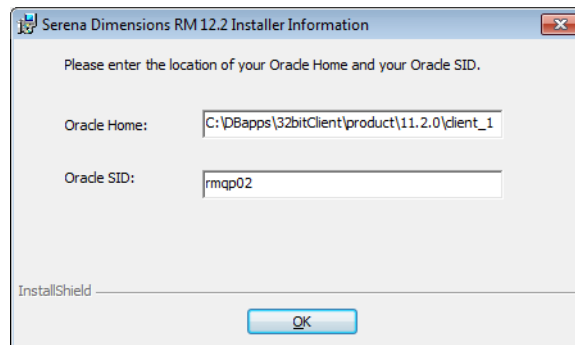
- 5 Select the License Server: enter the IP address or host name for the Serena License Manager (SLM) location. If the license manager has not yet been installed, choose **30 day evaluation**.



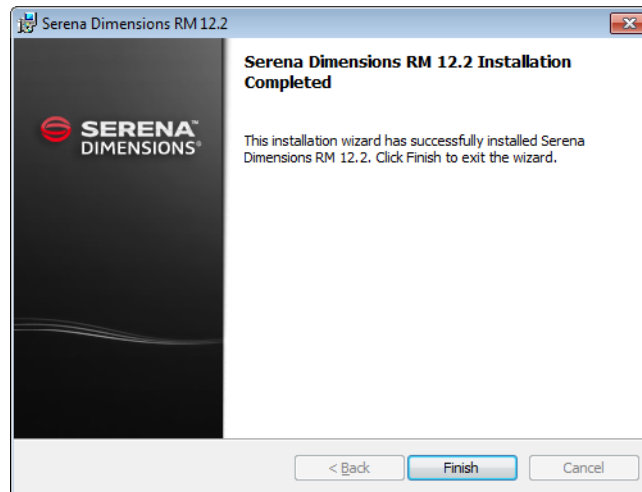
- 6 On the Tomcat Dialog – allow the default, **8080**, assuming ports have been checked to ensure that there is no conflict.



- 7 Click on **Manual Entry** on the *Select Oracle Installation* dialog.
  - a Select the correct version of the Oracle Client.
  - b Enter the Oracle Home (for RM must be the 32bit client home) and enter the Oracle SID.

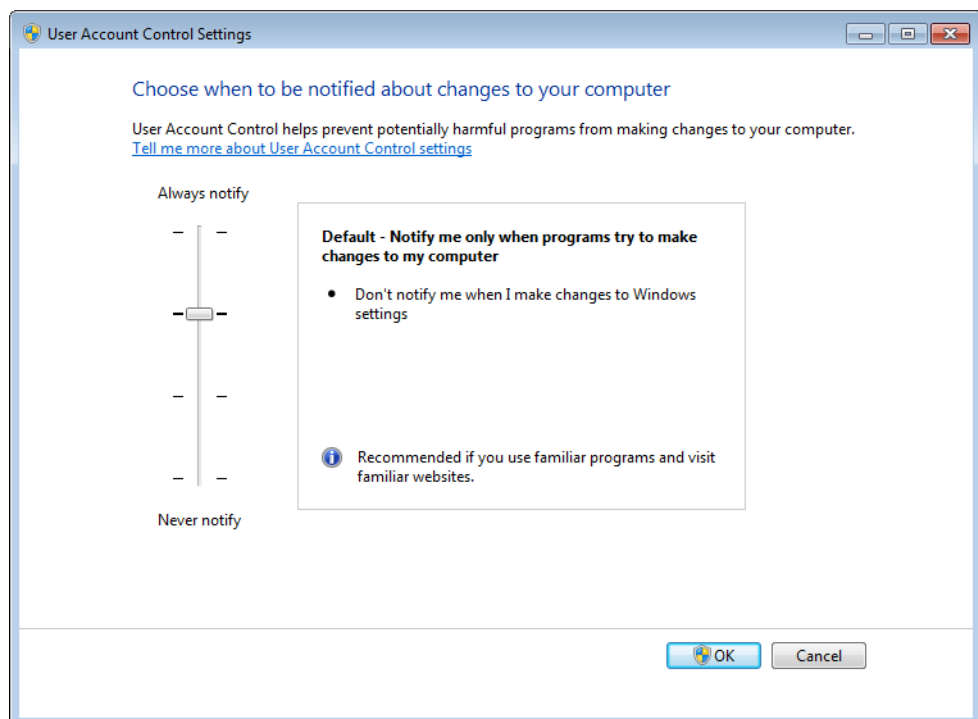


- 8 Enter the path to the `security.dat` file. This file must be stored under RM in the installation directory tree, for example:  
C:\Program Files (x86)\Serena\Dimensions 12.4.1\RM\security.dat
- 9 Check the **Add Shortcuts** box – if shortcuts are wanted – and click on **Install**.
- 10 Once the *Successfully Completed* install dialog is raised, click on **Finish**.



**If the UAC settings were lowered for the installation (as suggested) say NO to the request for restart until after the UAC has been returned to its normal position.**

**Return UAC to its former setting and then restart the server:**





## Chapter 5

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# Post-Installation Activities for a Fresh Dimensions RM Installation

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## Chapter Overview

This chapter discusses the post-installation procedures and checks that are required following the fresh installation of a Serena® Dimensions® RM Server. For a Dimensions RM Admin Client or RMImport Client installation certain of these procedures will not be applicable, principally those with reference to the RM Browser and Web Servers.

For post-installation procedures and checks specifically for Dimensions RM upgrade installations, see ["Post-Installation Activities for an Upgraded Dimensions RM Installation" on page 129](#).



**IMPORTANT!** When using RM Manage or RM Class Definition from a client machine, the changes will not take effect until the Serena Dimensions RM Pool Manager is restarted on the RM server.

## Checklist

✓	Checklist Items
	Check that the installation has completed successfully (see <a href="#">"Checking That the Installation Has Completed Successfully" on page 57</a> ).
	Check that the Windows services are setup correctly and running (see <a href="#">"Checking Windows Services" on page 57</a> ).
	Check that the License server is running and licenses are available (see <a href="#">"Licensing Dimensions RM Products" on page 58</a> ).
	Set the optional security message if you have installed to a secure system (see <a href="#">"Setting the Optional Security Message" on page 58</a> ).
	Install or configure MS Office to allow document publishing (see <a href="#">"Support for Publishing / Word Import" on page 60</a> ).
	Check for updates (see <a href="#">"Checking for Latest Updates" on page 65</a> ).
	Set up the database schema and ICDBA Account (see <a href="#">"Creating the ICDBA Account" on page 65</a> ).
	Import an example Dimensions RM project (see <a href="#">"Importing an Example Dimensions RM Project" on page 72</a> ).
	If you installed the Single Sign On (SSO) components, configure SSO (see <a href="#">"SSO and CAC Configuration" on page 76</a> ).
	Configure the Web Server for RM Browser (see <a href="#">"Configuring the Web Server for RM Browser" on page 83</a> ).
	Configure the Web Server for RM Import and RM Import Designer (see <a href="#">"Configuring the Web Server for RM Import and RM Import Designer" on page 83</a> ).
	If applicable, enable Dimensions CM-Dimensions RM ALM Integration (see <a href="#">"Prerequisites for the Dimensions CM to Dimensions RM Integration" on page 84</a> ).



	If applicable, enable a project for ALF Events (see <a href="#">"ALF Enabling a Dimensions RM Project" on page 85</a> ).
	Check if RM Browser is accessible (see <a href="#">"Test Browser Access" on page 83</a> ).
	Quickly check out the Dimensions RM installation (see <a href="#">"Quickly Checking the Installed and Configured Dimensions RM Server" on page 85</a> ).
	Turn UAC back on for Windows Server 2008, if applicable (see <a href="#">"Turning UAC Back on After Installing Dimensions RM on Windows Server 2008" on page 90</a> ).

## Immediate Dimensions RM Post-Installation Activities

### Checking That the Installation Has Completed Successfully

There is a small possibility that the installation may not have completed successfully even though it may have appeared to have done so. It is recommended that you check that the expected software is listed in the Control Panel | Add or Remove Programs window following the installation. Select the appropriate entry (for example, **Serena Dimensions RM 12.4.1**) and click the **Click here for support information link** to check the version number.

### Checking Windows Services

- 1 Log in as a user with local Windows administrative rights. Access Services by:

Start | Control Panel | Services

or

Start | Control Panel | Administrative Tools | Services

This will display the status of the services for your particular Windows PC.

- 2 Check that the following database and Dimensions RM services have Status Started and Startup Automatic.

- Dimensions RM services:

Serena Dimensions RM Pool Manager  
Serena License Server(\*)

(\*) This service may be absent if you are using Serena License Manager (SLM) on another server. If the service should be present and is not running, refer to ["Starting the License Server" on page 30](#) for instructions on setting it up.

- Serena-Supplied Runtime RDBMS or Oracle services

OracleDBConsoleRM  
Oracle<oracle\_service\_name>TNSListener(\*)

OracleService<oracle\_service>(\*\*)

- (\*) By default this will be OracleDimensionsTNSListener.
- (\*\*) For the 32-bit 10g Serena-Supplied RDBMS, this will normally be OracleServiceRM; whereas, for the 32-bit or 64-bit 11gR2 Serena-Supplied RDBMS, this will normally be OracleServiceDIM12 (or OracleServiceDIM10 on some earlier versions). See chapter "[The Database Instance Creation Details](#)" on page 40.

- 3 Open the Windows task manager and check for the following database and Dimensions RM processes:
  - Dimensions RM processes (note that there will be several rmAppServer.exe processes for a default installation):  
  
rmAppServer.exe  
RMServerPool.exe
  - Serena-Supplied Runtime RDBMS or Oracle Enterprise only processes:  
  
oracle.exe  
TNSLSNR.EXE

## Licensing Dimensions RM Products

See "[Licensing Dimensions RM](#)" on page 25 details about licensing Dimensions RM components.

## Setting the Optional Security Message

If you are installing to a secure system, you must enable the optional security warning as soon as installation is complete. Please see the topic "Creating Custom Login Alert Pages for RM Browser" in the *RM Administrator's Guide*.

## Virus Checkers

Real-time virus checking of certain Dimensions RM and Oracle database files can cause a noticeable slowdown in Dimensions RM server operations. The following list identifies the principal files that can be excluded from real-time virus to improve performance:



**IMPORTANT!** The files listed below should, of course, still be included in other forms of virus scans—it is only their exclusion from real-time checking for all reads and writes during operation that is being recommended.

File Name	Execution Mode	Risks Introduced by Excluded from Real-Time Virus Checking
Datacacheserver.exe (continued on next page)	<ul style="list-style-type: none"> <li>■ Run as system user continuously once the product is installed.</li> <li>■ Memory usage of this particular process increases/decreases depending upon the load.</li> </ul>	This executable is continuously using the active system memory and is accessed by each and every request over the Internet or intranet.
Datacacheserver.exe (continued)	<ul style="list-style-type: none"> <li>■ Multiple process are launched and run in the memory.</li> </ul>	
Oracle.exe	<ul style="list-style-type: none"> <li>■ Run as system user continuously once the Oracle is installed and the instance is started.</li> <li>■ Memory usage of this particular process increases/decreases depending upon the load.</li> </ul>	As above.
rmAppserver.exe	<ul style="list-style-type: none"> <li>■ Run as system user continuously once the product is installed.</li> <li>■ Memory usage of this particular process increases/decreases depending upon the load.</li> <li>■ Multiple process are launched and run in the memory.</li> </ul>	As above.
RMServerPool.exe	<ul style="list-style-type: none"> <li>■ Run as system user continuously once the product is installed.</li> <li>■ Memory usage of this particular process increases/decreases depending upon the load.</li> <li>■ Multiple process are launched and run in the memory.</li> </ul>	As above.

File Name	Execution Mode	Risks Introduced by Excluded from Real-Time Virus Checking
rtmBrowser.exe	<ul style="list-style-type: none"> <li>■ Launched and then killed once the request is served—that is, this process will not run continuously in memory.</li> <li>■ Run as IUSR anonymous user account.</li> </ul>	rtmBrowser.exe is launched and killed for each and every request. It does not continuously occupy active memory; consequently, it can be safely be included in an on-demand scheduled virus scan.

## Support for Publishing / Word Import

In order to allow publishing and importing documents, Dimensions RM needs to access Microsoft Office (32-bit). As the standard configuration of Windows Server does not allow this, the Windows Server installation needs to be modified as described in the following chapters.

To allow the SYSTEM user account to access Microsoft Office, create these folders:

- C:\Windows\System32\config\systemprofile\Desktop
- C:\Windows\SysWOW64\config\systemprofile\Desktop

### Publishing on Windows Server 2012 R2

To allow the SYSTEM user account to access Microsoft Office, create these folders:

- C:\Windows\System32\config\systemprofile\AppData\Local\Microsoft\Windows\INetCache
- C:\Windows\SysWOW64\config\systemprofile\AppData\Local\Microsoft\Windows\INetCache

### Creating a Local Administrator Account

To allow Dimensions RM using Microsoft Word, Microsoft Word needs to run under a local administrator account. It is suggested to use a separate account with a user name which identifies its function.

**To create a local Administrator account, follow these steps:**

- 1 Open Windows Control Panel.
- 2 In Category view, click **Change account type**. In Icon view click **User Accounts**. Then click **Manage User Accounts**.
- 3 Select the **Advanced** tab.
- 4 In the **Advanced user management group**, click **Advanced**. This opens the **Local Users and Groups** dialog.

- 5** In the **Local Users and Groups** dialog, right-click the folder **Users** and select **New User...** from the shortcut menu. This opens the **New User** dialog.
- 6** In the **User name** box, enter the account name you want to create, e.g. *RmPublish*.
- 7** In the **password box**, enter a complex password.
- 8** Repeat the password in the **Confirm password** box.
- 9** Take a note of that password.
- 10** Ensure that the **User must change password at next logon** box is clear.
- 11** Select the **User cannot change password** box.
- 12** Select the **Password never expires** box.
- 13** Click **Create**.
- 14** Click **Close**.
- 15** Select the **Administrator** option.
- 16** Click **Finish**.
- 17** In the tree, select **Users**. This shows a list of users.
- 18** Right-click user *RmPublish* and select **Properties** from the shortcut menu. This opens the *RmPublish* **Properties** dialog.
- 19** Select the **Member Of** tab.
- 20** Click **Add...**
- 21** Type *Administrators* into the **Enter the object names to select (examples)** box and click **Check Names**. This should show *SERVER\_NAME\Administrators*.
- 22** Click **OK**.
- 23** Click **OK**.
- 24** Change to the log on page and log on with user *RmPublish*.
- 25** Start all installed Microsoft Office applications and confirm any dialogs.
- 26** Log off user *RmPublish*.
- 27** Log in with your Administrator account to continue with the next steps.



**PRIVILEGES To prevent local or remote login, follow these steps:**

- 1 From the Start menu, select **Administrative Tools | Local Security Policy** or open the **Control Panel** in Icon view and click **Administrative Tools**. This opens the **Local Security Policy** dialog.
- 2 In the **Local Security Policy** dialog, expand **Local Policies**.
- 3 Select **User Rights Assignment**.
- 4 Double-click **Deny log on locally**.
- 5 Click **Add User or Group...**
- 6 Type *RmPublish* into the **Enter the object names to select (examples)** box and click **Check Names**. This should show `SERVER_NAME\RmPublish`.
- 7 Click **OK**.
- 8 Click **OK**.
- 9 Double-click **Deny log on through Remote Desktop Services**.
- 10 Click **Add User or Group...**
- 11 Type *RmPublish* into the **Enter the object names to select (examples)** box and click **Check Names**. This should show `SERVER_NAME\RmPublish`.
- 12 Click **OK**.
- 13 Click **OK**.

## Using Microsoft Office on Windows Server

To allow Dimensions RM to use Microsoft Office (32-bit), the following steps have to be executed:

- 1 Open the Command Prompt.
- 2 Type `comexp.msc /32` and press Enter.
- 3 Navigate to **Component Services | Computers | My Computer | DCOM Config**
- 4 Right-click **Microsoft Word 97 - 2003 Document, Microsoft Word Document** or **Microsoft Office Word Document** and select **Properties**.
- 5 Select the **Identity** tab.
- 6 Select **This user**.
- 7 Click **Browse...** to open the **Select User** dialog.
- 8 Type the user name of the local administrator into the **Enter the object names to select (examples)** box and click **Check Names**. This should show `SERVER_NAME\RmPublish`.

(The administrator account name would be RmPublish if you followed the example in chapter "Creating a Local Administrator Account" on page 60).

- 9 Replace the placeholder text in the **Password** and **Confirm password** boxes with the password for the entered local administrator account.
- 10 Click **OK**.
- 11 Ensure that you prepared the server as described earlier.



**NOTE** For publishing documents in PDF format, Microsoft Office 2007 SP 2 (32-bit) or higher is required. For further information, see chapter "Microsoft Office Requirements" on page 22.

## Using Adobe Reader on Windows Server

If Adobe Reader is installed on the server, publishing documents can cause RM Browser to hang. This occurs if the document you publish contains a PDF document (e.g. through a file attachment of a requirement). Execute the following steps to allow the SYSTEM user account to access Adobe Reader:

- 1 Open the Command Prompt.
- 2 Type `comexp.msc /32` and press Enter.
- 3 Navigate to Component Services | Computers | My Computer | DCOM Config
- 4 Right-click **Adobe Acrobat Document** and select **Properties**.
- 5 Select the **Identity** tab.
- 6 Select **The interactive user**.
- 7 Click **OK**.

## Configuration and the First Project

The newly created RM database requires configuration before it can be accessed; configuration is performed using the newly installed administration tool: RM Manage.

During configuration the administrator account ICDBA is created. This account is not a log in account, but access to it is required for administrative tasks such as new project creation. The creation of the ICDBA account requires an Oracle sysdba account.

RM Manage *can be* accessed from a desktop icon, or from:

Start | All programs | Serena | Dimensions RM 12.4.1 | RM Manage

- RM Manage
- 1 Right-click on RM Manage, and select **Run as administrator** from the context menu.
  - 2 Create the ICDBA account:
    - a Right-click on the database instance configured for RM, RMQP02 in the examples, and select **Create ICDBA Account**.

- b** Enter the ICDBA password. The existing SYSDBA account and password must be entered for authentication.
- c** Click on **Advanced**: For this initial RM Demo project 2048 MB is sufficient. When creating production databases, increase the tablespace size to 2 GB for general usage and 4-6 GB for installations with more than 20 users.
- d** Click on **Create**

*If the DBA has chosen to create a tablespace for each RM project in advance of project definition (Create in an existing tablespace) use the sizes mentioned above.*

- 3** From RM Manage, create a "New Project" – as the first project in the database the process for its creation is unique. The RMDemo test project should be used to "prime" the database. It provides an excellent example of a "typical" project definition - however it should not be used to initiate a project.
  - a** Right-click on the database and select **New Project**.
  - b** The user is prompted to enter the ICDBA account password.
  - c** The user will be prompted to set the ICADMIN password – please check the box and set the ICPROJECTS account with the same process, as shown below. These are NOT login accounts.



**NOTE** The passwords for ICADMIN and ICPROJECTS must be UPPER CASE. It is our best practice recommendation to make the ICADMIN and ICPROJECTS passwords the same.

- d** The next step is to name the project, RMDemo, and to set the RMDemo project administrator account password - as shown below. This administrator account allows for a separation of administrator duties between accounts. Using RMDemo, Enter project name and establish project admin password; click OK.



**NOTE** Make a note of the project administrator password – you will need this soon.

- e** From the sample projects tab, select **RMDemo**.
  - f** Unless you would like to allow users to "play with this project" using fake user names, do not check **Include Security Data**.
  - g** Set **Buffer Size** to 100.
  - h** Click **Install**.
  - i** If the message *The version of project "RMDemo" is not current. Would you like to update it now?* is displayed – click **Yes**.
- 4** Once the RMDemo project has been created and populated, a minor version inconsistency will be displayed. Please convert the database before continuing.
    - a** To convert, right-click on the database name and select **Convert Database**.
    - b** Highlight the database, for example RMQP02, and select upgrade.
    - c** Click **Yes** when prompted to re-create procedures.
  - 5** After the conversion has completed, the projects within it must be upgraded.
    - a** Click on the **+ sign** to expand the project list – for an initial installation. There will only be RMDemo.



- b** Highlight the RMDemo project and click on **Upgrade**.
  - c** When the *Conversion Progress* dialog is raised, click on **Continue**.
  - d** Click on **Done**, when the selection is no longer grayed out.
- 6** For a new installation, the user will be prompted to *Change User*; change the user to the admin account created with the RMDemo project. The user name is *RMDemoAdmin* and the password is that which was set when the project was created.

## Checking for Latest Updates

After installing Dimensions RM, periodically ensure that you visit the Serena support Web site at

<http://www.serena.com/support/>

to determine the latest patch updates for Dimensions RM, if any. This site requires first time users to register for a user name and password.

Once logged into the support site, under Support | My Downloads you will find an option to download patches (select **Dimensions RM** from the **Please Select Product** dropdown list and then click the **Click here for Patches** link next to the dropdown list). Search the list of patches to see if there are any maintenance patches appropriate to your version of Dimensions RM. If there are any such patches, it is normally recommended that you download them together with the associated patch readme and apply them. Each patch download normally includes the patch binary, an integral patch installer, and the associated patch readme that includes instructions for running the patch installer.

## Creating the ICDBA Account

Before you can log in to Dimensions RM, you have to create an ICDBA Oracle account and password in the schema within the Serena-Supplied RDBMS or Oracle RDBMS that is to be used for Dimensions RM.

There are two methods of doing this:

- Using RM Manage "Create IC DB Account" (Recommended)
 

Starting with Dimensions RM 11.2.1, you now have the option of creating the ICDBA Oracle account (and associated password) from within RM Manage.

See ["Creating the ICDBA Account From Within RM Manage"](#) on page 66.
- Using the "setupRM.sql" Script (or Your Own Edited Version)
 

You or your database administrator (DBA), as an Oracle SYSDBA user (for example, SYS), can manually run the pre-prepared setupRM.sql SQL script located at:

```
<install directory>\Serena\Dimensions <version>\RM\sql
```

for example:

```
C:\Program Files\Serena\Dimensions 12.4.1\RM\sql\
```

setupRM.sql




**IMPORTANT!** If you run an edited version of the script, it should be noted that Dimensions RM requires both the user account ICDBA and its associated password to be in upper case.

For the Serena-Supplied Runtime RDBMS, the default password for SYS is CHANGE\_ON\_INSTALL

The procedure for running this script is described in "[Running the setupRM.sql SQL Script](#)" on page 67. See also, "[Changing the ICDBA Password in the setupRM.sql SQL Script](#)" on page 67 and "[Sample SQL Scripts](#)" on page 70.

## Creating the ICDBA Account From Within RM Manage

### To create the ICDBA account:

- 1 Select the database in which you want to create the ICDBA account (for example, RM).
- 2 Select **File | Create ICDBA Account**, click the **Create ICDBA Account** button , or right-click the database and select **Create ICDBA Account**.
- 3 The **Create ICDBA account** dialog box opens.
- 4 In the **Password** field of the **Create ICDBA account area**, type the password that you want to assign to the Dimensions RM ICDBA account.



**IMPORTANT!** The password must be in upper case only.

- 5 In the associated **Confirm Password** field, re-type the password.
- 6 In the **Account Name** field of the **Enter SYSDBA account password** area, enter the appropriate SYSDBA Oracle account that you want to use, for example, SYS.
- 7 In the associated **Password** field, type the associated password for the account name.



**NOTE** For the Serena-Supplied Runtime RDBMS, the default password for the SYS account is CHANGE\_ON\_INSTALL.

- 8 By default, the ICDBA account is created in a new SERENA\_RM\_ADMIN tablespace for the ICDBA account and its size is set to 1024 MB. To set a different size or create the ICDBA account in an existing tablespace, click the **Advanced** button. The dialog expands to display the advanced features.
  - To set a different size for the SERENA\_RM\_ADMIN tablespace, set the **Tablespace** and **Units** values as desired.
  - To create the ICDBA account in an existing tablespace, select the **Create in existing tablespace** option, and select the desired tablespace from the list.
  - If you wish to resize one of the tablespaces or create a new one with a specific name, click the **Administer Tablespaces** button and complete the fields as necessary.

**9** Click **Create**.

**IMPORTANT!** For the Oracle 11g RDBMS and the 11g versions of the Serena-Supplied Runtime RDBMS, Oracle account passwords expire by default after 180 days. Unless your DBA has re-configured such RDBMS to override this default and allow permanent passwords, you must change the ICDBA password before 180 days elapse using the RM Manage **Change Administrator Password** menu item, see ["Changing Database Administrator Account Passwords Using RM Manage"](#) on page 70.

## Running the setupRM.sql SQL Script

Follow these steps to configure the schema and create the ICDBA account:

- 1 Open a Windows Command Prompt window:

All Programs | Accessories | Command Prompt

- 2 Navigate to the location of the setupRM.sql file, for example:

```
C:\Program Files\Serena\Dimensions 12.4.1\RM\sql\
  setupRM.sql
```

- 3 In the Command Prompt window, enter the following commands:

```
sqlplus sys/<password>@<databasename> as sysdba
SQL> @setupRM.sql
SQL> exit
```

for example:

```
sqlplus sys/change_on_install@rm as sysdba
SQL> @setupRM.sql
SQL> exit
```



**NOTE** The error message:

```
ORA-01543: tablespace 'USERS' already exists
```

can be safely ignored.

## Changing the ICDBA Password in the setupRM.sql SQL Script

You may wish to change the ICDBA password to something other than the default ICDBA in the setupRM.sql file (it must be in upper case) before running it.

**To change the ICDBA password:**

- 1 Open the setupRM.sql file in a text editor.
- 2 Locate the following line:

```
create user ICDBA identified by ICDBA default tablespace users;
```

- 3 Change the second occurrence of ICDBA to an upper case password of your own choice. The first character must be an alphabetic character, and underscores ( \_ ) are reserved for special characters. This password is not case-sensitive. The following example line includes the password SERENA\_123:

```
create user ICDBA identified by SERENA_123 default tablespace users;
```

- 4 Save the file.

## Password Expiration for Oracle 11g Passwords

The standard security default on Oracle 11g is for passwords to expire after 180 days. If your passwords expire you will receive an ORA-28001 error message. Your DBA should ensure that Oracle accounts are created so that they do not expire. You should also update the `security.dat` file in `<install directory>\Serena\Dimensions <version>\RM\` on a regular basis.

Starting with Dimensions RM 11.2.1, you can change the passwords for the Dimensions RM database administrator Oracle accounts ICDBA, ICADMIN, and ICPROJECTS from within RM Manage —see ["Changing Database Administrator Account Passwords Using RM Manage"](#) on page 70.

For other Oracle accounts, the following SQL script can be run when creating them such as to disable password expiration, but this will only work if run prior to a password actually expiring.



**CAUTION!** Serena makes no warranty of any kind in regard to the contents of this script, including but not limited to implied warranties of merchantable quality or fitness for any particular purpose. Serena shall not be liable for errors contained in it or for incidental or consequential damages in connection with the furnishing, performance, or use of this script. The information in this script is subject to change without notice.

```
Script start  /*
              With Oracle 11 the new security defaults set Oracle Account to expire
              the passwords after 180 days. This forces the user to change all DB
              passwords for Oracle accounts
              sys
              system
              ICDBA
              ICADMIN
              ICPROJECTS
              <RM Projects>
              This is good default security but requires good Oracle knowledge to
              maintain these accounts. As a work around this script creates a
              profile where passwords will NOT expire. Then assigns account RM
              needs to this profile. This must be run before the account have
              their password expire. Once the passwords expire they must be
              changed.

              Please be aware that by running this script you are reducing the
              security of the Oracle database. Be sure you understand the risks
              and accept them before running this script.
              */
```

```

CREATE PROFILE "SERENANOLOCKOUT" LIMIT CPU_PER_SESSION DEFAULT
CPU_PER_CALL DEFAULT
CONNECT_TIME DEFAULT
IDLE_TIME DEFAULT
SESSIONS_PER_USER DEFAULT
LOGICAL_READS_PER_SESSION DEFAULT
LOGICAL_READS_PER_CALL DEFAULT
PRIVATE_SGA DEFAULT
COMPOSITE_LIMIT DEFAULT
PASSWORD_LIFE_TIME UNLIMITED
PASSWORD_GRACE_TIME UNLIMITED
PASSWORD_REUSE_MAX 1
PASSWORD_REUSE_TIME UNLIMITED
PASSWORD_LOCK_TIME 5
FAILED_LOGIN_ATTEMPTS UNLIMITED
PASSWORD_VERIFY_FUNCTION NULL
;

/*
As a minimum the ICADMIN and ICPROJECTS accounts should be set to not
expire as these accounts do not receive pending expiration warnings.
They are more involved to change than the others requiring
generation of a new Security.DAT file.
*/
ALTER USER ICADMIN PROFILE SERENANOLOCKOUT;
ALTER USER ICPROJECTS PROFILE SERENANOLOCKOUT;

/*
Next set the primary RM accounts: ICDBA and the PROJECTS to not expire.

Below please copy and edit the line
ALTER USER RMDEMO PROFILE SERENANOLOCKOUT;
Change RMDEMO to your first project name - uppercase
Then copy this line so each project has its own line.
*/
ALTER USER ICDBA PROFILE SERENANOLOCKOUT;
ALTER USER RMDEMO PROFILE SERENANOLOCKOUT;

/*
And lastly the Main Oracle accounts. This is where the security starts
to get weak if you do not change the passwords on a regular basis.
If you do not have a DBA to maintain these for you it may be good to
make sure they do not expire and lockout. Especially as the RM admin
you will rarely use these accounts.
*/
ALTER USER SYS PROFILE SERENANOLOCKOUT;
ALTER USER SYSTEM PROFILE SERENANOLOCKOUT;
ALTER USER SYSMAN PROFILE SERENANOLOCKOUT;
ALTER USER DBSNMP PROFILE SERENANOLOCKOUT;


```

Script end

## Changing Database Administrator Account Passwords Using RM Manage

Starting with Dimensions RM 11.2.1, for the Dimensions RM database administrator Oracle accounts ICDBA, ICADMIN, and ICPROJECTS you now have the option of changing their passwords from within RM Manage.

### To change the ICDBA, ICADMIN, or ICPROJECTS account password:

- 1 Select the database whose administrator accounts (one or more of ICDBA, ICADMIN, or ICPROJECTS) you want to change associated passwords.
- 2 Select **File | Change Administrator Password**, click the **Change Administrator Password** button , or right-click the database and select **Change Administrator Password**.
- 3 The **Change administrator password** dialog box opens.
- 4 In the **Select account to modify area**, select the ICDBA, ICADMIN, or ICPROJECTS account as appropriate from the **Account** drop-down list.
- 5 In the **Change account password** area, type the new password that you want to assign to the chosen account.



**IMPORTANT!** The password must be in upper case only.

- 6 In the associated **Confirm Password** field, re-type the password.
- 7 In the **Enter ICDBA account password** area (note for ICDBA, this will be entitled **Enter current ICDBA account password**), type the current ICDBA password.
- 8 Click **Change**.



**IMPORTANT!** For the Oracle 11g RDBMS and the 11g versions of the Serena-Supplied Runtime RDBMS, Oracle account passwords expire by default after 180 days. Unless your DBA has re-configured such RDBMS to override this default and allow permanent passwords, you must change the ICDBA password before 180 days elapse.

## Sample SQL Scripts

Dimensions RM installs various sample scripts in the directory:

```
<install directory>\Serena\Dimensions <version>\RM\sql
```

for example:

```
C:\Program Files\Serena\Dimensions 12.4.1\RM\sql\
  setupRM.sql
```

These are primarily intended for knowledgeable DBAs and comprise the following:

### **setupRM.sql**

See ["Creating the ICDBA Account" on page 65](#).

**SetupDatabase.bat**

A Windows batch file that runs the setupRM.sql SQL file. If used, this should be edited for your own particular set up.

**icadmin-upgrade-RM2009R1.sql**

A SQL file that can be used for database upgrade operations with respect to upgrading Dimensions RM 2009 R1 databases to 2010 R1. Please consult Serena support for details.

**icadmin-upgrade-RM2009R1.bat**

A Windows batch file that runs the icadmin-upgrade-RM2009R1.sql SQL file. If used, this should be edited for your own particular set up.

**icadmin-upgrade-RM2009R1SP1.sql**

A SQL file that can be used for database upgrade operations with respect to upgrading Dimensions RM 2009 R1SP1 databases to 2010 R1. Please consult Serena support for details.

**icadmin-upgrade-RM2009R1SP1.bat**

A Windows batch file that runs the icadmin-upgrade-RM2009R1SP1.sql SQL file. If used, this should be edited for your own particular set up.

## Creating the First Administrator

There are three views in RM Manage, the view is changed by clicking on one of three icons, which are, from left to right: the project icon, the group icon, and the user icon.

RM Administrator  
Information



The Project and User icons must be accessed in order to create the initial RM administrator. The administrator will, typically, be the person who creates new user accounts, creates and/or manages new project schema and oversees the general care and feeding of RM. Complete documentation concerning user and group management can be found in the RM Administrator's Guide; as part of the installation we are including only the steps necessary to add a user account in the Administrators group.

**The first account must be assigned to the already existing Administrators group.** Please note that, even if the organization is using LDAP accounts – this RM login account should be created and used by the person(s) administering RM.

To create the Administrator Account:

- a Click on the User icon (single head).
- b Right click on **Users** and select **New User**.

- c Enter the name of the Administrator into the box presented.



**NOTE** If the **Include Security Data** box was checked when the project was created, demo users will have been created – users with names like "Joe" and "Ephoto". These names can be used for testing - or simply deleted.

- d Once the user name has been entered, the details may be entered into the *New User* dialog on the right.
- e From the **Group Membership** tab, highlight the **Administrators** group and click on the **Add** button to move the group to the left which will make jfogerty a member of the Administrators group.
- f From the Password tab, assign a password.
- g The next step is to add the user to a project. Click on the **Project Icon**, and from the **Group Assignment** tab, click on **Administrators** which will add the Administrators group to the RMDemo project. Since jfogerty is a member of the Administrators group, his name will be moved to the **Assigned** box on the left.
- h From **Default Access** tab – right-click Administrators and select **Grant All** from the context menu. This setting will not actually grant all access to the administrator (this is explained in the Administrator's Guide), however it will grant all useful access.
- i Open a new RM Manage (**without closing the old one**) to test login with the password settings for the administrator account.

## Importing an Example Dimensions RM Project

After you install Dimensions RM, you must create a project from a provided example project or an existing project backup (but see "[Special Considerations When Restoring Existing Projects With E-mail Rules](#)" on page 75). The following steps explain how to create a project from a provided sample project. This is just an example; you can use these steps with other projects.



**NOTE** There are other options available for importing and creating projects, such as importing a saved project or creating a blank project. For information about these options, see the *Serena Dimensions RM Administrator's Guide*.

Do NOT use the QLARIUS or RMDemo sample projects as a starting point for an actual production project. Always start with the BLANK project or a project of your own that was created from the BLANK project and then saved (see the Saved Projects tab).

### To import an example project:

- 1 Start RM Manage.
- 2 Right click the Dimensions RM database (for example, RM) in the tree structure and select **New Project**. The **Please enter password** dialog box opens.



- 3 In the **Password** field, type the password for the Dimensions RM ICDBA account.



**NOTE** Step 4 only occurs when creating the first project in a chosen database. For subsequent projects created in that database, you go directly to Step 5.

- 4 Starting in Dimensions RM 11.2.1, the passwords for Oracle user accounts ICDBA, ICADMIN, and ICPROJECTS are no longer hard coded. The password for the ICDBA account has to be assigned first when creating that account (as explained in "[Creating the ICDBA Account](#)" on page 65); whereas, the passwords for the ICADMIN and ICPROJECTS accounts have to be assigned on first-project creation within a database as explained here.



**IMPORTANT!** You must ensure that you create the ICDBA account and associated password before assigning passwords to ICADMIN and ICPROJECTS. There is no software check to ensure that this has been done in the correct order.

- a The **Enter ICADMIN/ICPROJECTS password** dialog box opens.
- b In the **ICADMIN Password** field, type the password to be assigned that account.



**IMPORTANT!** The password must be in upper case only.

- c Serena recommends that you use the same password for the ICADMIN and ICPROJECTS accounts. This is done by default.

However, if you want to assign a different password to ICPROJECTS, select the **Change ICPROJECTS password** checkbox and enter an appropriate upper case password in the **ICPROJECTS Password** field.

- d By default, the account is created in a SERENA\_RM\_ADMIN tablespace. To create the account in an existing tablespace, click the **Advanced** button. The dialog expands to display the advanced features:
- To create the account in an existing tablespace, select the **Create in existing tablespace** option, and select the desired tablespace from the list.
  - If you wish to resize one of the tablespaces or create a new one with a specific name, click the **Administer Tablespaces** button and complete the fields as necessary.
- e Click **OK**.



**IMPORTANT!**

- When creating the accounts for ICADMIN and ICPROJECTS, Dimensions RM automatically generates a new `security.dat` file. The old version of this file is renamed and retained as a backup.
- For the Oracle 11g RDBMS and the 11g versions of the Serena-Supplied Runtime RDBMS, Oracle account passwords expire by default after 180 days. Unless your DBA has re-configured such RDBMS to override this default and allow permanent passwords, you must change the ICADMIN and ICPROJECTS passwords before 180 days elapse using the RM Manage **Change Administrator Password** menu item, see "[Changing Database Administrator Account Passwords Using RM Manage](#)" on page 70.

- 5 The **Please Enter Project Information** dialog box opens.

- 6 Type a project name in the **Project Name** field (for example, MYPROJECT).
- 7 Type a project password in the **Project Password** field (for example, MYPROJECT) and retype it in the **Confirm Project Password** field.
- 8 Type a system administrator password in the **Administrator Password** field (for example, MYPROJECT). (An Oracle privileged account is required to create new projects.)
- 9 Retype the system administrator's password in the **Confirm Administrator Password** field, and click **OK**. The new project will now be created.



**NOTE** The project password is one that Dimensions RM uses as an Oracle user password. It is not needed to use Dimensions RM. The administrator account (which is automatically created and named by appending ADMIN to the project name, for example, MYPROJECTADMIN) and password (for example, MYPROJECT) are the ones you need to remember when you first open the project you are in the process of creating (for example, MYPROJECT).

Starting with Dimensions RM 11.2.1, the project administrator Oracle account only has access rights with respect to the RM Manage tool itself. No other Dimensions RM tools can be accessed with this account.

Depending on the sizes of various tables in your database, for particular tables, **Tablespace Error** dialog boxes may open during project creation to indicate that a particular table is not at high enough value. If this occurs, for each **Tablespace Error** dialog box:

- a Read and take note of the error message in the dialog box.
  - b Click **Yes**. A **Resize Tablespace** dialog box will open.
  - c In the **Resize Tablespace** dialog box, enter in **New Datafile Size** the new tablespace size increased (at least) as recommended in [Step a](#).
  - d Click **Resize**. A **Resize** dialog box will open.
  - e In the **Resize** dialog box, click **Yes**.
  - f In the **Resize Tablespace** dialog box, click **Close**.
- 10 Click **OK** in the **Success** dialog that informs you that the project has been created. The **Import** dialog opens.
  - 11 Click the Sample Projects tab and select a sample project (for example, RMDemo).



**IMPORTANT!** Do NOT use the QLARIUS or RMDemo sample projects as a starting point for an actual production project. Always start with the BLANK project or a project of your own that was created from the BLANK project and then saved (see the Saved Projects tab).

- 12 Select the **Include Security Data** check box. This will enable you to include user accounts, user groups, and access right definitions in the sample project.
- 13 For sample projects such as RMDemo, a buffer of 1 MB is sufficient, so you can accept the default value in the **Buffer Size (Mb)** list.

- 14 Click **Install**. After the installation is complete, you are prompted whether you want to view the log file. Click **Yes** or **No** as appropriate.




**NOTE** See the Dimensions RM readme for information on possible Oracle errors that can be safely ignored.

- 15 Exit RM Manage.

Your new project (for example, MYPROJECT) based on a sample project (for example, RMDemo) will now be available for use. You can test its availability as follows:

- 1 Start RM Manage.
- 2 Click the Dimensions RM database (for example, RM) in the tree structure. The **Logon Information** dialog box opens.
- 3 In the **User Name** field, type the name of the system administrator for the project that you just created (for example, MYPROJECTADMIN).
- 4 In the **Password** field, type the password of the system administrator for the project that you just created (for example, MYPROJECT).
- 5 Click **OK**.
- 6 In the **RM Manage** dialog box, click the '+' sign next to the Dimensions RM database (for example, RM) in the tree structure. Your new project (for example, MYPROJECT) will appear in the tree structure and will be labeled (current).

If the project is not shown as (current) it will need to be converted as follows:

- a Select the database that contains the project you want to convert.
- b Select **File | Convert Database**, click the **Convert Database** button , or right-click the database and select **Convert Database**. This starts the conversion tool.
- c To expand the database that contains the project you want to convert, click + next to the database name.
- d Enter the ICDBA password.
- e Select the project and click **Upgrade**.
- f To start the upgrade, click **Continue**. The upgrade may take several minutes to complete.



**NOTE** For more information about working with projects, including creating Dimensions RM users, see the *Serena Dimensions RM Administrator's Guide*.

## Special Considerations When Restoring Existing Projects With E-mail Rules

If you create a new project from the back up of an existing project, there are special considerations that need to be taken into account if the existing project uses e-mail rules.

If you back up a project that uses e-mail rules and then restore it to a different Dimensions RM database, the restored project will:

- Miss out some of the rules.

- Assign some of the rules to the wrong user.

If you wish to back up and restore a project that uses e-mail rules, please contact Serena Support who will work with you to overcome these issues and successfully back up and restore the project.

## SSO and CAC Configuration

The Serena Single Sign On (SSO) option in the Dimensions RM installer installs components needed for the RM server to communicate with a Serena SSO server. The Serena SSO server is an optional part of a Dimensions CM or SBM installation.

For information about installing and configuring the Serena SSO server, see the Dimensions CM or SBM documentation.

### Configuring SSL Certificates

You must create and configure SSL certificates to ensure security. See the Dimensions CM or SBM documentation for general information on the creation and configuration of SSL certificates for Serena SSO.



**NOTE** For initial setup and testing, demonstration certificates are included in the installation. These are not intended for production use and should be replaced with your own certificates. See the Dimensions CM or SBM documentation.

- Create a certificate for the RM server (RM\_CERT). Configure the STS server to trust this certificate. The certificate can be either self-signed or signed by a certificate authority (CA\_RM\_CERT).



**NOTE** To communicate with the Serena SSO server (STS server), your RM Server and fat client systems must include a copy of the STS server certificate.

See ["Exporting a Certificate from IIS" on page 76](#), ["Exporting a Certificate from the STS Server" on page 77](#) and ["Adding a Certificate for RM Server to the STS Keystore" on page 78](#).

- Create a certificate for the RM web server (RM\_WEB\_CERT). To enable SSO with remote fat clients, the RM web server should be configured for SSL and the certificate should be signed by a known certificate authority.



**IMPORTANT!** Remote fat clients use SSL when connecting to RM Server to avoid transferring plain-text passwords and certificates over the network.

### Exporting a Certificate from IIS

When you have configured the RM Web Server to use an SSL certificate (which you should do before production use), then you must configure the Admin clients to use the same CA certificate as was used to sign the certificate for the RM Web Server. The CA certificate must be in .pem format.



**NOTE** The following example procedure shows how to export a CA certificate from IIS server. However, as of RM 12.1, RM includes its own Tomcat web server, so Apache and IIS are not required, though you can optionally run a third-party web server in addition to the Serena Common Tomcat web server if you wish to avail yourself of the security and management features of a third-party web server.

- 1 Start the **Computer Management Console** by running the command `compmgmt.msc`. Alternatively you can right-click on the Computer icon and select **Manage** from the resulting menu.
- 2 Locate **Internet Information Server (IIS) Manager**.
- 3 Select a computer node.
- 4 From the **Home** list, locate the **Server Certificates** icon and expand it.
- 5 Locate the IIS certificate from the list and open it.
- 6 From the opened dialog, switch to the **Certification Path** tab.
- 7 Select a CA certificate from the list and open it.
- 8 From the opened dialog, switch to the **Details** tab.
- 9 Click **Copy to File**.
- 10 Follow the instructions in the resulting Wizard and export the CA certificate to a file in DER encoded binary format. The file will have a `.CER` extension.
- 11 Use an openssl tool to convert the file to `.PEM` format as in this example:  

```
openssl x509 -in exported_certificate.cer -out
certificate_for_rm.pem -inform DER -outform PEM
```



**NOTE**

- Do not use a self-signed certificate on the RM Web Server.
- You can obtain an openssl binary from <http://www.openssl.org/>

### ***Exporting a Certificate from the STS Server***

After you have configured the Dimensions CM or SBM STS server with your own SSL certificates (rather than the demo certificates it may have shipped with), you must export a certificate from the STS server and then copy it to the RM Server.

**To export a certificate from the STS server:**

- 1 From a command prompt, navigate to the following directory on the STS server:  

```
TokenService.war\WEB-INF\conf
```
- 2 Run the following command:  

```
keytool -export -keystore keystore.jks -file sts.cer
      -alias sts
```

- 3 Enter the password for the keystore and press ENTER.  
The certificate file is exported to the file `sts.cer`.
- 4 Run the following command to convert the file to PEM format:  

```
openssl x509 -in sts.cer -inform DER -out sts.pem  
-outform PEM
```
- 5 Copy the resulting `sts.pem` file to the configured location on the RM Server. Verify that the value of the registry key `SSO_TRUST_CERTIFICATE` matches the actual location of the file. See "[RM Server Parameters](#)" on page 79.

### **Adding a Certificate for RM Server to the STS Keystore**

The RM server certificate has to be added to a configured truststore (the default file name is `truststore.jks`).

Here is an example command line to import a certificate into a truststore:

```
%java_home%/bin/keytool -importcert  
-file CERTIFICATE  
-alias ALIAS  
-keystore TRUSTSTORE  
-storepass PASSWORD
```

Where:

*CERTIFICATE* – Is a filename with a certificate in .DER format.

*ALIAS* – Is `rm_ca` if adding `CA_RM_CERT`, or `RMServer` if adding `RM_CERT`.

*TRUSTSTORE* – Is the filename for the keystore (`rm_truststore.jks` when adding `CA_RM_CERT`, or `truststore.jks` when adding `RM_CERT`).

To convert the RM Server certificate to .DER format, you can use an `openssl` command like the following:

```
openssl x509 -in CERTIFICATE.pem -inform PEM -out CERTIFICATE.der -  
outform DER
```



**NOTE** A Demo RM server certificate is automatically installed with the SBM STS server starting with SBM version 2009R4.01.

## **Enabling SSO as a Login Source**

Before you can use SSO authentication with RM projects, you must enable SSO as a login source for the database that contains them. The SSO login source is enabled via the RM Manage interface. See the *Serena Dimensions RM Administrator's Guide* for details.

## **Registry Keys and Configuration Files on the RM Server**

The following sections list the registry keys and configuration files located on the RM server system that are necessary to implement SSO. This may be of use in troubleshooting the configuration.

## RM Server Parameters

The location of the registry keys depends upon whether the system is running a 32- or 64-bit version of Windows:

- **32-bit:**

HKEY\_LOCAL\_MACHINE\SOFTWARE\Serena Software\RTM\Environment\Default

- **64-bit:**

HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Serena Software\RTM\Environment\Default

RM Server Registry Keys	
Key	Description
RMKey (String)	Contains a full path to a file with a private key of the RM server certificate. The Key file should not be password protected. The file must be in .pem format. Example: C:\Program Files\Serena\Dimensions\RM\conf\rmkey.pem
RMCertificate (String)	Contains a full path to a file for a certificate of the RM server. The file must be in .pem format. Example: C:\Program Files\Serena\Dimensions\RM\conf\rmcert.pem
SSOserver (String)	Contains the URL to the SSO/STS server. Only the host name and port are required. Example: http://ssohost:8085
STSServer (String)	Contains the URL to the STS server if it is installed separately. This is optional and is not needed when SSO is provided by SBM only.
SSO_TRUST_CERTIFICATE	Contains the full path to the STS server certificate. Example: C:\Program Files\Serena\Dimensions\RM\conf\sts.pem

RM Server Registry Keys	
Key	Description
SSO_RELIVING_PARTY	<p>Should contain the SSO "Reliving Party" used to validate and request Token. For more information about this value, read the STS server configuration information</p> <p>Contains a default value of:  <code>uri:org:eclipse:alf:sso:relyingparty                      :anonymous:anonymous:anonymous;uri                      :org:eclipse:alf:sso:relyingparty                      :serena.application.engine                      .notification.server:anonymous                      :anonymous</code></p>
SSO_CLOCK_TOLERANCE	<p>"Expiration Tolerance" time in sec, used to validate the STS Token. Sometimes clocks (server and relying party) are not perfectly aligned. A token might be issued say at 12:00:00 but the Relying Party might be 2-3 minutes behind so it is 11:57:00. In such a case, the token will be needlessly rejected. So we need to have a small (configurable) amount of time that allows for clock skew.</p> <p>Value set by the installer: 300</p>

### Gatekeeper Parameters

The Gatekeeper runs on the Serena common installation of Tomcat. Its parameters are contained in two configuration files located in the following directory (the beginning of the path varies depending on which Serena product the Tomcat installation is from):

*Serena\_Install\Common Tools X.X.X\tomcat\X.X\alfssogatekeeper\conf*



**IMPORTANT!** Ensure that the gatekeeper configuration specifies the same host names in Dimensions RM as in SBM or Dimensions CM. Specify host names rather than IP addresses. Else SSO may not work correctly with Web applications.

gatekeeper-core-config.xml	
Parameter	Description
SecurityTokenService	<p>URL to the STS server. This is configured by the installer.</p> <p>Example:  <code>http://sts-server:8085/TokenService/                      services/Trust</code></p>
SecurityTokenServiceExternal	Same as the SecurityTokenService.
FederationServerURL	<p>URL to the Federation server. This is configured by the installer.</p> <p>Example:  <code>http://sts-server:8085/ALFSSOLogin/login</code></p>



<b>gatekeeper-services-config.xml</b>	
<b>Parameter</b>	<b>Description</b>
Path: <GatekeeperProtectionControl> <ProtectedURIs> Element: <URIMatcher requestURI="/ rtmBrowser/*" />	URIMatcher should have one line that contains "/rtmBrowser/*" string. This is a definition of a filter to protect a particular web application.
Path: <Service name="default" ProtectionLevel="all"> <ServiceEntryPoints> <BrowserRequests> Element: <URIMatcher requestURI="/ rtmBrowser/*" />	Protected URL mask.
Path: <GlobalLogoutURI> Element: <URIMatcher requestURI="/*/ logout-sso.jsp" />	The default logout URL to use with the sequence to invalidate SSO token. When accessing this URL, the Gatekeeper automatically rejects the SSO token causing the login screen to appear.
Path: <DMZ> <BrowserRequests> Elements: <URIMatcher requestURI="/ rtmBrowser/css/*"/> <URIMatcher requestURI="/ rtmBrowser/html/*"/> <URIMatcher requestURI="/ rtmBrowser/images/*"/> <URIMatcher requestURI="/ rtmBrowser/imagesnew/*"/> <URIMatcher requestURI="/ rtmBrowser/jscript/*"/> <URIMatcher requestURI="/ rtmBrowser/jscripts/*"/> <URIMatcher requestURI="/ rtmBrowser/WebServices"/> <URIMatcher requestURI="/ rtmBrowser/WebServices/ rtmService.wsdl"/> <URIMatcher requestURI="/ rtmBrowser/Command"/>	

## Registry Keys and Configuration Files on the Fat Client

The following lists the SSO-related registry keys and configuration files located on systems with a fat client installation. This may be of use in troubleshooting the configuration.

The location of the registry keys depends upon whether the system is running a 32- or 64-bit version of Windows:

- **32-bit:**

HKEY\_LOCAL\_MACHINE\SOFTWARE\Serena Software\RTM\Environment\Default

- **64-bit:**

HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Serena Software\RTM\Environment\Default

RM Fat Client Registry Keys	
Key	Description
RMKey (String) (Optional)	Contains a full path to a file with a private key of the RM server certificate. The Key file should not be password protected. The file must be in .pem format. Example: C:\Program Files\Serena\Dimensions\RM\conf\rmkey.pem
RMCertificate (String) (Optional)	Contains a full path to a file for a certificate of the RM server. The file must be in .pem format. Example: C:\Program Files\Serena\Dimensions\RM\conf\rmcert.pem
SSOserver (String)	Contains the URL to the Dimensions CM or SBM SSO/STS server. Only the host name and port are required. Example: http://ssohost:8085
RMserver (String)	Contains the URL to the RM server.  Fat clients communicate with the RM server to request an SSO token. This registry key allows the use of non-standard ports. Remote fat clients must use HTTPS, so the URL must contain https for the protocol portion of the URL.  To use a specific port: https://rmserverhost:8443 To use a the default HTTPS port: https://rmserverhost3

RM Fat Client Registry Keys	
Key	Description
CAC (String) (Optional)	If this key contains a non-empty value, CAC logins are "enforced". In such a case, a user can be validated as a "pure" RM local user or by using smart cards. If this key doesn't exist, a user can be validated with SSO using a username/password combination.
CACertificate (String)	Contains the full path to a file with the CA_RM_WEB (a trusted issuer of the certificate) to validate the RM web server certificate. The file must be in .pem format.  <b>NOTE</b> Connection to RM Web uses SSL only, therefore this setting is important.

## Configuring the Web Server for RM Browser

### Access to Windows System TEMP Directory

If your Dimensions RM log in hangs, one possible reason may be that the user account running Tomcat does not have the requisite:

- read,
- modify, and
- delete

access to the Windows system TEMP directory. You must have such access for Dimensions RM log in to occur.

## Configuring the Web Server for RM Import and RM Import Designer

The Dimensions RM installer configures the Web server for RM Import and RM Import Designer; no manual configuration is required. For reference, the following sections summarize the tasks the installer performs to configure the Web server.

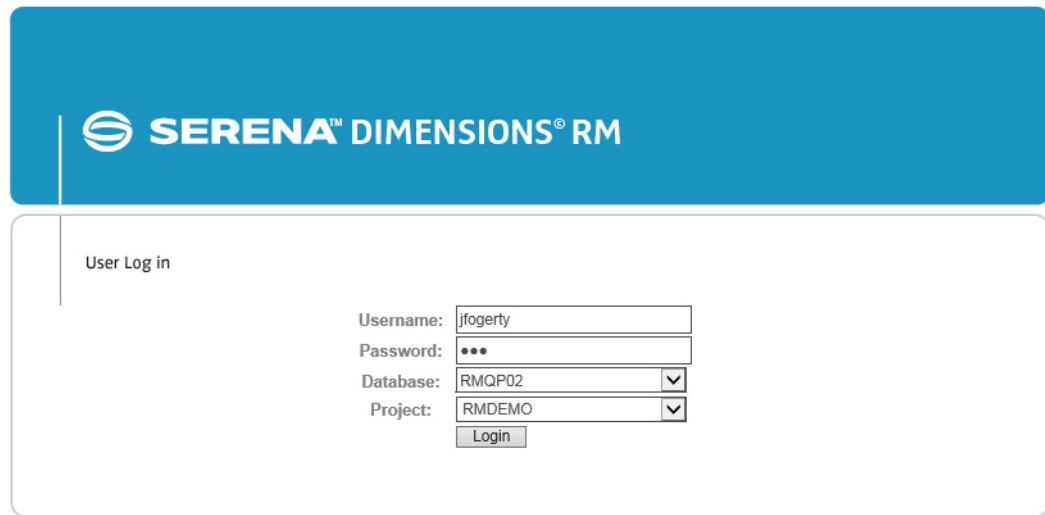
### Access to Windows System TEMP Directory

See "[Access to Windows System TEMP Directory](#)" on page 83.

## Test Browser Access

Using the hostname or ip address, the port selected for RM Tomcat (default 8080), run rtmBrowser. On the RM server, the URL might be `http://localhost:8080/rtmBrowser/`

For first installations, only the administrator account created during installation will exist, and only the RMDEMO project will be selectable.



Once you are sure that the passwords are functioning, and the browser can be accessed, step through chapter "Quickly Checking the Installed and Configured Dimensions RM Server" on page 85.

If there are any issues, please contact Serena Support.

## Prerequisites for the Dimensions CM to Dimensions RM Integration

To set up ALM the associations, the following prerequisites must be satisfied:

- Both Dimensions CM and Dimensions RM must have been installed and both must be at compatible release levels. See the Serena Integrations page of the relevant RM release: <http://support.serena.com/roadmap/Product.aspx?sel=RTM>.
- A Dimensions CM desktop client must be installed on the Dimensions RM web server machine.
- For certain installations (as described in this guide), it is recommended that Dimensions RM databases have exclusive use of their own Oracle instance. In those circumstances, if you are using Dimensions CM against an Oracle RDBMS, you must make sure that it does not share the same Oracle instance as that used by Dimensions RM.
- Before you can begin to establish any of the Dimensions RM to Dimensions CM associations referred to below, the `rmcm.xml` configuration file on the Dimensions RM web server machine must first be edited to include the URL of the Dimensions CM server. Proceed as follows:
  - a On the Dimensions RM web server machine, navigate to:  
`<RM-Install-Directory>\conf`
  - b Open the following configuration file in a text editor:  
`rmcm.xml`

This file has the following lines:

```
<project>
  <!-- CMServer url="http://localhost:8080" -->
  <CMServer url="" />
</project>
```

- c Update the Dimensions CM URL with the correct information for the Dimensions CM server. If Dimensions CM is installed on the same machine as the Dimensions RM web server and was installed with the default port number 8080, then the commented out URL on the preceding line will be the appropriate URL.
- The following Dimensions RM to Dimensions CM associations must have been established by a Dimensions RM administrator:
  - The requisite Dimensions RM projects to one or multiple Dimensions CM products (see the *Dimensions CM-Dimensions RM ALM Integration Guide*).
  - The requisite Dimensions RM baselines or collections to one or multiple Dimensions CM projects/streams (see *Dimensions CM-Dimensions RM ALM Integration Guide*).

Conversely, to enable Dimensions RM users to look at Dimensions CM requests, after the above steps have been completed, a Dimensions CM user must associate Dimensions RM requirements to Dimensions CM requests.



## ALF Enabling a Dimensions RM Project

Before a Dimensions RM project can be used in conjunction with Application Lifecycle Framework (ALF) events, the project must be enabled to emit ALF events and send notifications to the ALF event Manager. This is done by using the RM Manage File | Configure ALF options menu item. Please see the *Administrator's Guide* for details of this menu item and how to install and configure the ALF Emitter Service.

## Quickly Checking the Installed and Configured Dimensions RM Server

This section describes some quick checks that you can perform to establish that your Dimensions RM server installation is functioning correctly:

- 1 If you have not already imported an RMDemo example project into a new project MYPROJECT, please proceed to ["Importing an Example Dimensions RM Project" on page 72](#). Ensure that you select the **Include Security Data** check box described in [Step 12 on page 74](#), this will enable you to include user accounts, user groups, and access right definitions in the sample project.
- 2 In RM Manage, assign a password to existing user EPHOTO:
  - a Log in to the Dimensions RM database (for example, RM) using:
    - User Name  
MYPROJECTADMIN

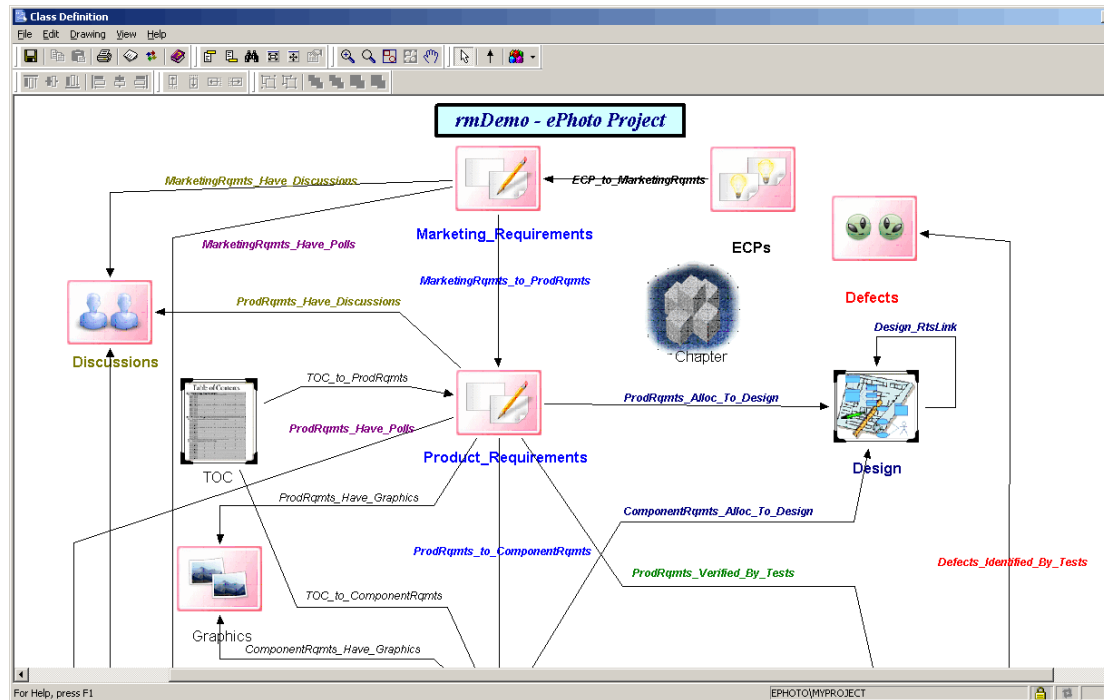
- Password  
MYPROJECT
  - b** Click the **View User Information** toolbar button 
  - c** In the left hand navigation tree, select user EPHOTO.
  - d** Select the Password tab.
  - e** Assign and confirm password of RTM and check **Password Never Expires**.
  - f** Click **Accept Changes**. In some circumstances the password may already be RTM.
- 3** In RM Manage, define a project schema for EPHOTO and view the class definition:
- a** Click the **View Project Information** toolbar button 
  - b** In the left hand navigation tree, right click the Dimensions RM database name, for example RM.



**NOTE** Make sure you right click on the database name (for example, RM) not the project name (for example, MYPROJECT).

- c** Select **Change User**. The **Logon Information** dialog box appears.
- d** Enter the following:
  - User Name  
Ephoto
  - Password  
RTM
- e** In the left hand navigation tree, right click the Dimensions RM project name based on the imported RMDemo example project, for example MYPROJECT.

- f Select **Define Project Schema**. After a short delay the **Class Definition** tool will open.



- g Save the class definition and exit the **Class Definition** tool:

File | Save

File | Exit

- h Log out of RM Manage.

- 4 In RM Browser, publish a traceability report for EPHOTO:

- a Log in using the following parameters:



- Username  
Ephoto
- Password  
RTM
- Database  
<database\_name> (for example, RM)
- Project  
<project\_name> (for example, MYPROJECT)

- b Click the Requirements tab.

- c Click the Reports sub-tab.



- d In the left hand navigation tree, double click **Traceability Reports**.

- e Click **ePhoto Marketing Requirements Trace**.



- f Click the Documents tab.
  - g Click the All Documents sub-tab.
  - h Double click **ePhoto Requirements**.
  - i Click the **Addition toolbar buttons** toolbar button 
  - j Click the **Publish** toolbar button 
  - k Save the generated Word document.
  - l Log out of RM Browser.
- 5 In RM Manage, create a new group:
- a Log in to the Dimensions RM database (for example, RM) using:
    - User Name  
MYPROJECTADMIN
    - Password  
MYPROJECT
  - b In the left hand navigation tree, single click the Dimensions RM database name, for example RM.



**NOTE** Make sure you single click on the database name (for example, RM) not the project name (for example, MYPROJECT).

- c Click the **View Group Information** toolbar button 
  - d In the left hand navigation tree, select user **Groups - <database\_name>** (for example, **Groups - RM**).
  - e (Right click) | New Group
  - f Type the name of a new group, for example, TEST.
  - g Fill in a description if desired, and click **Accept Changes**.
- 6 In RM Manage, create a new user and assign it to the new group TEST:
- a Click the **View User Information** toolbar button 
  - b In the left hand navigation tree, select user **Users - <database\_name>** (for example, **Users - RM**).
  - c (Right click) | New User
  - d Type the name of a new user, for example, TEST99.
  - e Fill in a descriptions if desired, and click **Accept Changes**.
  - f In the left hand navigation tree, select the new user TEST99.
  - g Click the Group Membership tab.
  - h Select the new group TEST in the **Not a Member** list and click **Add** to make the new user TEST99 a member of the new group TEST.
  - i Click the Password tab.
  - j Assign a permanent password to the new user TEST99, for example, TEST99.



- 7 In RM Manage, assign the new group TEST and new user TEST99 to the MYPROJECT project and grant all access:
  - a Click the **View Project Information** toolbar button  or View | Projects.
  - b In the left hand navigation tree, right click the Dimensions RM project name based on the imported RMDEMO example project, for example MYPROJECT.
  - c Click the Group Assignment tab.
  - d In the **Assign groups/users to project MYPROJECT** region, check the new group TEST.
  - e Click the Default Access tab.
  - f Right click on the new group TEST and select **Grant All**.
  - g Right click on the new user TEST99 and select **Grant All**.
  - h Log out of RM Manage.
- 8 In RM Browser, publish a traceability report for the new user TEST99:
  - a Log in using the following parameters:
    - Username  
test99
    - Password  
test99
    - Database  
<database\_name> (for example, RM)
    - Project  
<project\_name> (for example, MYPROJECT)
  - b Repeat the [Step b on page 87](#) through to [Step k on page 88](#).
- 9 In RM Browser, create a requirement for the logged in user TEST99:
  - a Click the Requirements tab.
  - b Click the **New** toolbar button . The **New** dialog box appears.
  - c Select **Component\_Requirements** from the **Class** drop down list and ensure that the **Category** drop down list is pre-populated with your demo project MYPROJECT.
  - d Populate the **Title** and **Text** text fields with suitable entries.
  - e Check **Close requirements after save**.
  - f Click **Save**.
  - g Click the Categories sub-tab if it is not already selected.
  - h The new requirement will be located at the bottom of the list of requirements in the **Component\_Requirements** list.
  - i Log out of RM Browser.
- 10 The Dimensions RM server quick installation checks are now complete. If there are any problems, please contact Serena Support.

## Turning UAC Back on After Installing Dimensions RM on Windows Server 2008

In chapter "[Temporarily Disabling UAC](#)" on page 38 it was explained that it may be necessary, in certain circumstances, when installing Dimensions RM on Windows Server 2008 to temporarily disable User Account Control (UAC) to avoid installation errors.

If it is necessary to disable UAC, it should remain disabled until you successfully complete the following:

- Installation of Dimensions RM.
- Creation of a Dimensions RM project.
- Verification of the following Dimensions RM functionality/connectivity:
  - The RM browser (rtmBrowser).
  - RM import.
  - Web services connectivity.
  - RM Manage.
  - Class definition functionality.

You should then turn UAC back on as follows:

- 1 Navigate as follows:

Start | Control Panel | User Accounts

The **User Accounts** page appears.

- 2 Click **Turn User Account Control on or off**.

The **Turn User Account Control On or Off** page appears.

- 3 Check the **Use User Account Control (UAC) to help protect your computer** check box.

- 4 Click **OK**.

A system restart will be needed to implement the change.

## Chapter 6

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# Upgrading an Earlier Release of Dimensions RM

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# Upgrade Scenarios and Their Execution

For new installations see chapter ["Installing Dimensions RM" on page 47](#).

There is, strictly speaking, no "upgrade" mechanism for Serena Dimensions RM; the older version must be un-installed before initiating the installation of the 12.4.1 release.

## Find the scenario below that best matches your needs:

- 1 Installing Dimensions RM on the Same Server as the Earlier Release:** The high-level steps, with references, are listed below.
  - a** Perform all pre-upgrade tasks, including backing up the database, all Dimensions RM projects, and un-installing RM. Please refer to chapter ["Pre-Upgrade Tasks" on page 93](#).
  - b** Serena Dimensions RM release 12.4.1 requires the Serena License Manager (SLM) release 2.2.0. If not already running SLM 2.2.0, upgrade the SLM. Please refer to chapter ["Upgrade the Serena License Manager" on page 96](#).
  - c** Install the new release of Dimensions RM. Please refer to ["Running Setup.exe" on page 50](#). (Do NOT continue with subsequent sections in [Chapter 4](#)).
  - d** Copy the security.dat file from the backed-up RM folder into the installation folder under RM. There will exist in that location the security.dat file created as part of the setup - that file can be over-written.
  - e** Convert / Upgrade all RM Projects. Please refer to ["Create and Restore Projects in New Database" on page 98](#).)
  - f** Place saved or backed-up files in their proper locations, see chapter ["Restoring Certain Dimensions RM Files" on page 99](#).



**CAUTION!** During same-server upgrades you must not change:

- Server names.
- Project names.
- Database names.

If you wish to do any of these, contact Serena Support.

## 2 Migrating to a fresh Oracle installation

- a** Perform all pre-upgrade (pre-migration) tasks, including backing up the database, all Dimensions RM projects, and un-installing RM. Please refer to chapter ["Pre-Upgrade Tasks" on page 93](#).
- b** If the fresh Oracle installation is on the same server:
  - Save TNSnames files for both the RDBMS server and the Oracle client.
  - Use the Oracle Universal Installer (OUI) to remove either the Serena-Supplied Runtime RDBMS or your own Oracle products following the Oracle documentation.
  - Uninstall the Oracle client if that is not done as part of [Chapter 3](#).
  - Reboot the RDBMS server.

- Delete both the root Serena-Supplied Runtime RDBMS or Oracle and program files directories.
  - Reboot the RDBMS server again.
- c Install and configure the new version of Oracle, either the Serena-Supplied Runtime RDBMS or your own Oracle; include the Oracle 32bit client, if not included with the Oracle install. Please refer to chapter ["Configuring Oracle" on page 37](#).
  - d Install the new release of Dimensions RM. Please refer to ["Installing Dimensions RM" on page 47](#).
  - e Place saved or backed-up files in their proper locations, see chapter ["Restoring Certain Dimensions RM Files" on page 99](#).
  - f Restore all RM Projects. Please refer to ["Create and Restore Projects in New Database" on page 98](#).



**IMPORTANT!** The Dimensions RM installer asks which version of Oracle it is being installed to and installs files specific to the version of Oracle that you specify.

## Pre-Upgrade Tasks

This section details the tasks that must be undertaken prior to initiating the upgrade.

### Record the Dimensions RM Mail Configuration

- 1 Log in to the Dimensions RM server machine as an administrator.
- 2 Record the RM Mail configuration:
  - a Select:  
(Windows) Start | Serena | Dimensions RM <version> | RM Mail Configuration
  - b Click through the **RM Mail** dialog tabs, and take screen shots or write down all of the configuration information, for example:
    - Database location.
    - Projects.
    - Server port number.



**NOTE** Restoring of e-mail rules to a new database is not supported.

## Back up Database, Projects, and Necessary Files



### CAUTION!

Before beginning the upgrade, make sure that you have a reliable backup of the RDBMS database installation. This requires that no users are accessing Dimensions RM while project data is secured. To ensure this, stop these services:

- Serena Common Tomcat
- Serena Dimensions RM Pool Manager
- Serena Dimensions RM E-Mail Notification Service

Note that stopping Serena Common Tomcat will also disable other applications using this service.

- 1 Backup all RM projects.



**NOTE** If installing the new release of RM on the same server, without a change in the RDBMS, the backups will only be re-imported in the event of a problem.

- a If migrating to a new RDBMS - please make a note of the project / tablespace names as well as the size of each project's tablespace.
  - At **import time**, you will be prompted to enter the *From User* as well as the *Tablespace Name*. The *From User* refers to the project name. Assuming that the organization's process was to allow RM to create and manage the tablespace when creating new projects – the tablespace name will also be the project name. **However, if there is an internal process** defined for creating a tablespace for new RM projects – the tablespace name may differ from the project (user) name.
 

*If unsure, from RM Manage, right click on the database name, and select **Administer Tablespaces**. This will list the current tablespace names. You might also check with your DBA.*
  - Select **Administer Tablespaces**, and check the size of each project tablespace. If the project is – and will remain – active, double the tablespace to be assigned when the new project is created.

- 2 Using RM Manage, right click on the project, and select **Backup/Restore Project Account**

Backup/Restore Project Dialog	
Field	Description
Legacy/Compatibility Mode	Legacy mode formats the backup such that it is compatible with Oracle 10. Legacy must be used when backing up projects from Oracle 10, and must then be used for their import - no matter which release of Oracle the projects are migrated to.
	<b>CAUTION!</b> If Oracle 10 is not in use: <b>Do not check the legacy box.</b>
Oracle Directory Path	This field is automatically populated with the default backup path on the Oracle server.

Backup/Restore Project Dialog	
Field	Description
File Name	<p>This field is automatically populated with a name for the backup file. The name is based upon the project name and the current date and time. Edit this name as needed.</p> <p><b>NOTE</b> In normal mode, the location is relative to the Oracle directory path. In Legacy Mode, the path to the Saved Projects directory of the RM installation is prepended to the file name.</p> <p><b>TIPS</b></p> <ul style="list-style-type: none"> <li>■ Note the location to which you saved the files. You may need to browse to that location from the Import dialog of the new RM installation or copy the files to the location expected by the new RM installation.</li> <li>■ You might want to consider modifying the backup file name such that the reason for this backup is clear, for example: RMDEMO_20141029_0946FinalForUpgrade.dmp</li> </ul>
Security Data	Exports all the users that have been assigned to this project, as well as their permissions, so that they may be imported into another database or project.
Buffer Size	<b>NOTE</b> This sets the temporary space available for the operation, and is used for Legacy Mode only. There is no reason to change the buffer size for the backup.

- 3 Rename the backup file such that it can be easily differentiated from standard project backups, e.g., RMDEMO\_20141029\_0946FinalForUpgrade.dmp.
- 4 Click the **Backup** button. The backup operation runs.



**NOTE** The log file is saved in the directory where the backup was created. It has the same name as the project, but with a .log extension instead of a .dmp extension. It also includes the letters "Exp" and a time stamp based on the backup operation, e.g. *ProjectName\_ExpDate\_ExpTime\_Exp.log*

- 5 Repeat the preceding steps for each project.
- 6 Because the uninstall and re-install will overwrite necessary files, please copy the following files to a temporary but safe place:
  - a Copy the RM directory tree to a backup. For example:  
copy C:\Program Files (x86)\Serena\Dimensions 12.1.0\RM  
  
C:\RM12.1.0\_Backup
  - b If upgrading by installing a patch, copy the rtmBrowser directory tree to a backup. For example:  
copy C:\Program Files (x86)\Serena\Dimensions 12.4.1\Common Tools 1.6.0\tomcat\7.0\webapps\rtmBrowser  
  
C:\rtmBrowser12.4.1\_Backup

- 7 If there are modified projects in the RM\Saved Projects directory, they too should be backed up.
- 8 **Stop all RM related Services:**
  - a Serena ALF Event Emitter
  - b Serena Common Tomcat
  - c Serena Dimensions RM E-Mail Notification
  - d Serena Dimensions RM Pool Manager
  - e Serena SyncEngine
- 9 Stop RM related Processes  
rmLicenseAgent.exe
- 10 Uninstall the existing Dimensions RM version using **Add or Remove Programs** from the Windows Control Panel.



#### CAUTION!

**Jscript:** Do **NOT** restore 11.x rtmBrowser\jscript or rtmBrowser\jscripts files to a 12.1.0, or newer, installation. The files are **NOT** compatible. If customized, you must manually edit the new files to re-implement the customizations that you wish to retain.



**IMPORTANT!** This should be a merging operation, that is, the new sub-directories should be retained and only tailored/modified backup files copied to the new sub-directories. The new sub-directories in their entirety *must not* be replaced with the backup versions.

## Upgrade the Serena License Manager



**NOTE** For additional details concerning the license manager installation see chapter "[Licensing Dimensions RM](#)" on page 25.

Dimensions RM 12.4.1 requires SLM Version 2.2.0. To upgrade from any previous version of the *Serena License Manager* (SLM) to this required version, please proceed as follows:

- 1 Shut down your existing version of SLM.
- 2 Back up the following files in the existing SLM installation directory:
  - Windows
    - merant.opt (if you created such a file)
    - serena.lic
  - UNIX
    - licmgr.ini
    - merant.opt (if you created such a file)
    - serena.lic
    - users.lst



- 3 Uninstall the existing SLM.
- 4 Install the new version of SLM, see *Installing the Serena License Manager*.
- 5 Restore the files in [Step 2](#) to the new SLM installation directory and start SLM.

## Upgrading Existing RM Projects

When upgrading from a previous RM release, the database and the projects contained within it must be upgraded to reflect the functionality and corrections delivered with the new release.

Move the security.dat file, stored away prior to the upgrade, into the directory specified to hold the file during installation, for example:

C:\Program Files (x86)\Serena\Dimensions 12.4.1\RM

Wait to return the forms and javascript files until after the basic functionality has been tested.



### CAUTION!

Before beginning the upgrade, make sure that you have a reliable backup of the RDBMS database installation. This requires that no users are accessing Dimensions RM while project data is secured. To ensure this, stop these services:

- Serena Common Tomcat
- Serena Dimensions RM Pool Manager
- Serena Dimensions RM E-Mail Notification Service

Note that stopping Serena Common Tomcat will also disable other applications using this service.

### **Database Conversion with RM Manage**

- 1 If desktop icons were installed, right-click on RM Manage, otherwise from Start | All programs | Serena | Dimensions RM 12.4.1 | RM Manage. Right-click and select **Run as administrator** from the context menu.
- 2 Highlight a relevant database name, and a prompt for the administrator user name and password will be raised. If, instead, a *Logon failure* message is displayed – then likely the security.dat file is incorrect.
 

Check to be sure that the correct security.dat file has been moved from the previous installation directory to the folder indicated for its storage during the install.

Serena Dimensions RM is installed in a new folder; the security.dat file from the previous installation will remain in the previous installation folder.
- 3 Right-click on the database and select **Convert Database** from the download.
- 4 Highlight the database in the validation dialog and click on **Upgrade**.
  - a You will be promoted for the ICDBA password.

- b** If prompted to recreate procedures, select **Yes**.
- 5** Click on the **+ sign** to expand the project list.
  - a** Highlight the first project on the list, click on **Upgrade** .
  - b** When the *Conversion Progress* dialog is raised, click on the **Continue** button. Please note that for large projects, a *Not Responding* warning may be displayed on the dialog – please ignore and be patient.
  - c** Once the Summary – Upgraded message appears, close the dialog. The upgraded project will be marked as current.
  - d** Continue with the next project on the list until all projects have been upgraded. They will all be listed as current.
  - e** Close the database validation dialog.

## Create and Restore Projects in New Database

To complete the migration, new projects must be created and populated using the .dmp files exported from original database. If the organization has special rules for naming each project tablespace – have the DBA create a tablespace for each of the projects to be transferred – defining a tablespace consistent with the size in the *OldDB*.

- 1** Move all backed-up .dmp files onto the new Oracle server. We recommend moving them into a special "migration" folder on the Oracle Server.
- 2** Start RM manage.
- 3** Login to the new database as the RM Administrator.
- 4** Right click on the database name and create the first project on the list of projects to be restored.
- 5** Enter new project information.
- 6** Click **OK**.
- 7** Click **OK** on the *Success* dialog
- 8** Click **EXIT** on the *Import* dialog. The project will be listed as pre 3.7.2 as it is essentially empty.
- 9** Set sizes for tablespaces (Administer Tablespaces) consistent with those used in the previous database. If this is a project with growth potential, increase the size.
- 10** Right click on the newly created project, and select **Backup/Restore Project Account**.
- 11** Enter (copy and paste) the name of the folder in which the migration files are stored, and the name of the file to be restored.
- 12** Click on **Restore**.
- 13** When prompted for *From User* and *Tablespace*, enter the project name and the name of the tablespace from the previous database (OldDB).

- 14 The *From user* refers to the OldDB project name. If the organization's process was to allow RM to create the tablespace when a new projects were created – the tablespace name to be entered will also be the project name. Check the notes created during the process "[Back up Database, Projects, and Necessary Files](#)" on page 94.
- 15 If a message indicating that the project is not current is displayed, you can click on **Yes** to update.
- 16 Close the open dialogs, the project should be displayed as *Current*.
- 17 Check group assignment and default access – if both backup and restore were performed with security, all access rights should be set as they were. Do make sure that the RM Administrator has access to the new project.
- 18 Right-click on the database name and select **Change user** from the context menu. Log in as a project administrator user.
- 19 After the first project has been restored, check to see that all is functioning as expected from the browser before returning to [Step 4 on page 98](#) and repeating the steps until all projects have been created and populated.

## Post-Installation Activities for an Upgraded Dimensions RM Installation

This section details the post-installation tasks for an upgraded installation. Normally, these are the only post-installation activities that are required, that is, you do not normally need to perform those tasks required for a fresh installation as documented in chapter "[Post-Installation Activities for a Fresh Dimensions RM Installation](#)" on page 55.



**CAUTION!** Please ensure that you read and implement, where appropriate, the tasks documented in this section. Failure to do this may result in the installation failing (and you not being able to re-instate your existing Dimensions RM installation).

### SSO Configuration

If you installed the RM Single Sign On (SSO) components, see chapter "[SSO Configuration](#)" on page 99.

## Restoring Certain Dimensions RM Files

In "[Back up Database, Projects, and Necessary Files](#)" on page 94 you were advised to back up certain files. You can now restore your backed up versions of Saved Projects to the new Dimensions RM 12.4.1 installation directory.

### Restoring Tomcat Files

During the setup process, a new Tomcat has been installed. This requires to carry over any modification made to the previous Tomcat installation, e.g. templates. To avoid

overwriting, the Common Tools folder has been renamed bearing the extension .backup. If the folder originally had the name Common Tools 1.5.2.0 it is renamed to Common Tools 1.5.2.0.backup. Please note that the rtmBrowser directory within Tomcat's webapps directory has been renamed to rtmBrowser.bak. Using the directory name from above, an installation path might be: C:\Serena\Dimensions RM\Common Tools 1.5.2.0.backup\tomcat\6.0\webapps\rtmBrowser.bak.



**CAUTION!**

**Jscript:** Do **NOT** restore 11.x rtmBrowser\jscript or rtmBrowser\jscripts files to a 12.1.0, or newer, installation. The files are **NOT** compatible. If customized, you must manually edit the new files to re-implement the customizations that you wish to retain.

If upgrading from RM 12.1.x, the forms and jscript folders will be located under Common Tools, for example: C:\Program Files (x86)\Serena\Dimensions 12.1.0\Common Tools 1.5.2.0\tomcat\6.0\webapps\rtmBrowser\jscript



**IMPORTANT!** This should be a merging operation, that is, the new sub-directories should be retained and only tailored/modified backup files copied to the new sub-directories. The new sub-directories in their entirety *must not* be replaced with the backup versions.

RM 11.x	RM 12.1-12.4.1
<i>RM_Install</i> \RM\conf	<i>RM_Install</i> \RM\conf
<i>RM_Install</i> \RM\rtmBrowser\forms	<i>RM_Install</i> \Common Tools <i>x.x</i> \tomcat\ <i>x.x</i> \webapps\rtmBrowser\forms
<i>RM_Install</i> \RM\rtmBrowser\jscript\	<i>RM_Install</i> \Common Tools <i>x.x</i> \tomcat\ <i>x.x</i> \webapps\rtmBrowser\jscript\
<i>RM_Install</i> \RM\rtmBrowser\jscripts\	<i>RM_Install</i> \Common Tools <i>x.x</i> \tomcat\ <i>x.x</i> \webapps\rtmBrowser\jscripts\

Modified forms, stored under rtmBrowser\forms in a database/class definition structure can be copied. Publish templates, stored under rtmBrowser\conf\*Database\_Name*\*Project\_Name* can also be copied.

**Restoring Custom Headers and Footers of RM Browser Interface**

This chapter applies when upgrading from Dimensions RM 12.1 or higher.

**To restore your headers and footers of the RM Browser interface, follow these steps:**

- 1 In Windows Explorer, navigate to your rtmBrowser backup directory. If you are installing a **regular upgrade**, this is the rtmBrowser.bak directory (refer to chapter ["Restoring Tomcat Files" on page 99](#)). In case you are installing a **patch**, this is the directory to which you backed up your rtmBrowser directory tree (refer to chapter ["Pre-Upgrade Tasks" on page 93](#)).
- 2 Open the WEB-INF folder.
- 3 Open the spring.xml file in a text editor.
- 4 Locate the last "bean id" in the file. It begins :  

```
<bean id="rmHeaderAndFooterText"
```

- 5 Beneath this entry, there are two property tags:
    - `<property name="header">`
    - `<property name="footer">`
  - 6 Copy the above two property tags to the Clipboard.
  - 7 In Windows Explorer, navigate to your `RM_Install\Common Tools #.#\tomcat\#.#\webapps\rtmBrowser\WEB-INF` directory.
  - 8 Locate the last "bean id" in the file. It begins :  
`<bean id="rmHeaderAndFooterText"`
  - 9 Beneath this entry, there are two property tags:
    - `<property name="header">`
    - `<property name="footer">`
  - 10 Replace the above two property tags with the Clipboard content.
  - 11 Save the file.
- Copy the files referenced in the property tags from your `rtmBrowser` backup to the same location of your new installation.

**Example:**

Your "header" property tag looks like this:

```
<property name="header"><value>/rtmBrowser/html/myheader.htm
</value></property>
```

In this case, you would copy the file `myheader.htm` from

`C:\rtmBrowser12.4.1_Backup\html`

to

`RM_Install\Common Tools #.#\tomcat\#.#\webapps\rtmBrowser\html.`

## Updating a Dimensions CM/RM Integration

If you had an integration between Dimensions CM and Dimensions RM 11.x, you must modify the integration in order for it to work with Dimensions RM 12.4.1 or newer.

### To update a Dimensions CM/RM integration:

- 1 Open the following sql file in a text editor:
 

```
RM_Install\Dimensions\RM\sql\upgrade_cmr_integration_for_12.1.sql
```
- 2 Edit the following line replacing *RM* with the name of the Dimensions RM Oracle database:
 

```
C_DB_NAME CONSTANT VARCHAR2(32) := 'RM' ;
```
- 3 Edit the following line replacing *8080* with the Dimensions RM Tomcat port:
 

```
C_PORT CONSTANT VARCHAR2(5) := '8080' ;
```
- 4 Save your changes to the sql file.

- 5 Open an SQL Plus or SQL Developer connection to the Oracle database for the Dimensions CM integration.



**NOTE** By default, the database is named **cm\_typical** and there is a user ID of the same name that has the required permissions.

- 6 Run the sql script.



**TIP** See the comments in the sql file for details about what the script does.

## Quickly Checking the Upgraded Dimensions RM Server

Please see the checks for a fresh installation documented in chapter "[Quickly Checking the Upgraded Dimensions RM Server](#)" on page 102 and ensure that those appropriate to an upgrade installation can be performed.

## Chapter 7

---

# Secure Socket Layers (SSL)

Working with Secure Socket Layers

104

## Working with Secure Socket Layers

Secure socket layers (SSL) is an advanced security feature that allows Web servers to provide resource protection using the following methods:

- **Encryption.** Allows you to keep the information that passes between the Web server and a client such as a Web browser, RM Import, or RM Import Designer confidential.
- **Data Integrity Protection.** Provides the means for protecting information that passes between the Web server and a client such as a Web browser, RM Import, or RM Import Designer from being altered by a third party.

### Setting Up Secure Socket Layers

You set up secure socket layers on the Web server using the user interface or configuration file provided by the Web server.

For information on setting up secure sockets layers, refer to your Web server documentation.



## Chapter 8

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# Lightweight Directory Access Protocol (LDAP)

## Configuring LDAP

Serena® Dimensions® RM supports multiple login sources, including Lightweight Directory Access Protocol (LDAP). For information about configuring LDAP, see the *Serena Dimensions RM Administrator's Guide*.

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