TrackRecord® 6.0 and Reconcile™ 1.0 Installation Guide

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Table of Contents

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Chapter 1
Introduction

The *TrackRecord/Reconcile Installation Guide* provides information and procedures to install and configure TrackRecord and Reconcile. It includes the following chapters:

◆ **Chapter 1**, **"Introduction**"— Description of intended audience for this guide, information you should know before you install a product, related publications, web information, and how to get help.

◆ **Chapter 2**, **"TrackRecord Installation**"— List of system requirements, overview of types of installations, detailed instructions on installing the TrackRecord server, AutoAlert, and WebServer, TrackRecord clients, creating custom client installations, instructions for starting the server, configuring AutoAlert and the WebServer, and uninstalling TrackRecord.

◆ **Chapter 3**, **"Reconcile Installation**"— List of system requirements, detailed information on installing the Reconcile server, Web Service, and client, creating a share directory for Reconcile production database files, creating a new database, and uninstalling Reconcile.

Who Should Read This Guide

The *TrackRecord/Reconcile Installation Guide* is intended for administrators who are installing these products. This guide does not contain usage information. You can find that information in your online help facility and *User's Guide*.

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

Before You Install a Product

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

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

Related Publications

The TrackRecord/Reconcile installation documentation set includes:

◆ The *TrackRecord/Reconcile Installation Guide* includes system requirements and instructions for installing TrackRecord and Reconcile.

◆ The *License Installation Guide* includes instructions for licensing your product.

Viewing and Printing Online Books

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

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

World Wide Web Information

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

FrontLine Support Web Site

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

FrontLine provides fast access to critical information about your product. You can read or download documentation, frequently asked

questions, and product fixes, or email your questions or comments. The first time you access FrontLine, you are required to register and obtain a password.

Getting Help

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

◆ The name, release (version) of the Compuware product. This information is on the covers of the product documentation.

◆ Installation information, including installed options, whether the product uses local or network databases, whether it is installed in the default directories, whether it is a standalone or network installation, and whether it is a client or server installation.

◆ Environment information, such as the operating system and release on which the product is installed, memory, hardware/ network specifications, and the names and releases of other applications that were running.

◆ The location of the problem in the software, and the actions taken before the problem occurred.

◆ The exact product error message, if any.

◆ The exact application, licensing, or operating system error messages, if any.

◆ Your Compuware client, office, or site number, if available.

Technical Support

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1-800-538-7822

Chapter 2
TrackRecord Installation
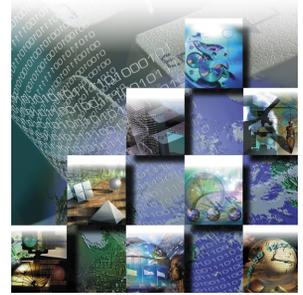
TrackRecord records and reports information about products being developed or supported. Information on team members, testers, schedules, and defect reports is recorded in an object-oriented database; it can be retrieved using TrackRecord's query and reporting features. This chapter describes how to install TrackRecord and includes the following sections:

◆ **System Requirements —** Hardware and software requirements for installing TrackRecord on the server and client.

◆ **Types of Installations —** Explanation of the type of installations available with TrackRecord.

◆ **Installing the TrackRecord Server, AutoAlert, and WebServer —** Instructions for installing TrackRecord, AutoAlert, and WebServer.

◆ **Installing a TrackRecord Client —** Instructions for installing a TrackRecord client.

◆ **Creating Custom Client Installations —** Instructions for creating a custom client installation.

◆ **Starting the TrackRecord Server —** Overview of methods of running an application and information regarding networks behind a firewall.

◆ **Configuring TrackRecord WebServer —** Instructions for creating a virtual directory and running in interactive mode.

◆ **Configuring TrackRecord AutoAlert —** Instructions for installing AutoAlert on a different PC and how to run AutoAlert with SMTP, information regarding creating a mailbox and mail profile, and troubleshooting AutoAlert.

◆ **Uninstalling TrackRecord —** Instructions for removing TrackRecord.

System Requirements

TrackRecord has the following minimum system requirements:

For the TrackRecord Server

- ◆ A PC running either:
    - ◇ Microsoft Windows 2000, Windows NT server, or Workstation 4.0 or higher with TCP/IP network protocol software
    - ◇ Novell Netware 4.0 with IPX/SPX network protocol software
- ◆ 32MB total system memory (64MB recommended)
- ◆ 50MB of free disk space, plus room for database expansion
- ◆ Static IP address for systems using TCP/IP protocol

For AutoAlert

- ◆ A SMTP-compliant mail system with the following specifications:
    - ◇ Windows NT server running Microsoft Exchange Server
    - ◇ Windows 2000 with SMTP sub-component of IIS 5 installed
    - ◇ Windows NT 4 server with SMTP sub-component of IIS 4 from the Option Pack 4 installed

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Note   SMTP only works with Microsoft Outlook/Exchange 97, 98, or 2000.

- ◆ A MAPI-compliant mail system on the server to allow AutoAlert to send messages. Note the following:
    - ◇ Microsoft Outlook is recommended on the server to facilitate configuration and testing of the mail profile
    - ◇ If you are using Microsoft Office 97, you must update your original version of CDO.DLL. Windows 95 and 2000 use 1.21 version 5.5.2448.0 or higher. If CDO.DLL is not installed, or if you would like to update your version of CDO.DLL, you can download it from http://www.microsoft.com/exchange/downloads/CDO.htm. CDO.DLL is also not enabled by default with Microsoft Outlook 2000. To correct this, rerun the installation and enable the Collaborative Data Objects library

For the WebServer

A pre-existing "cgi-win" virtual directory (see "Creating a Virtual Directory" on page 20) and one of the following servers installed:

- ◆ Microsoft Internet Information Server (IIS) 2.0 or higher (3.0 or higher with ASP recommended)

- ◆ Microsoft Peer Web Services
- ◆ Netscape Enterprise Server 2.0 or higher
- ◆ O'Reilly Web Site or Web Site Professional

For TrackRecord Clients

- ◆ 640 x 480 display (minimum)
- ◆ Windows 95, Windows 98, Windows 2000, or Windows NT 4.0 or higher
- ◆ Microsoft Internet Explorer 4.0 or higher to support HTML Help WebServer access supports Internet Explorer 4.0 or Netscape Navigator 4.5 or higher
- ◆ 32MB total system memory
- ◆ TCP/IP or Novell Netware 4.0 client software

Types of Installations

There are three types of TrackRecord installations: server installations, client installations, and a custom client installation. The custom client installation is a tool for system administrators to design their own client installations.

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

- ◆ **Server Installation**: If you have a license to use TrackRecord on multiple PCs, you can install TrackRecord on a dedicated PC to act as your server and perform a client installation on each workstation that will access the server. The server will house the database and will share it with the client workstations. Install the server before installing the client. Note that the server must be updated with each product release. See "Installing the TrackRecord Server, AutoAlert, and WebServer" on page 8.

- ◆ **Client Installation**

    - ◇ **Multi-user**: If you are running TrackRecord on multiple PCs that will share a database, you must perform the server installation on a dedicated PC and then perform a client installation on each workstation that will access the server.

◇ **Single-user**: If you are running TrackRecord as a stand-alone, single-user install, it is not necessary to perform the server installation.

   See "Installing a TrackRecord Client" on page 11.

◆ **Custom Client Installation**: If you are a system administrator who wants to design a custom client installation, choose this setup type. This is desirable in cases when you want to ensure consistency across all client installations or you want to automate the process of the client. You can define the parameters and choose how much intervention will be required as well as create different custom client installations for different groups with different needs. See "Creating Custom Client Installations" on page 14.

Installing the TrackRecord Server, AutoAlert, and WebServer

If you are running a previous version of TrackRecord, uninstall the previous version and reboot your PC before proceeding with this installation. See "Uninstalling TrackRecord" on page 26.

Note   TrackRecord WebServer requires a \cgi-win virtual directory. It is recommended that you create this virtual directory before installing the WebServer. See "Creating a Virtual Directory" on page 20 for additional information.

To install the TrackRecord Server, AutoAlert, and WebServer software, perform the following procedure:

1 **Insert the Compuware CD into the CD-ROM drive.**

   The CD browser should automatically appear. If it does not, open the **Run** option from the **Start** menu. Click the **Browse** button to navigate to the setup.exe file on the CD-ROM disk.

2 **If you are installing TrackRecord from the *QA*Center CD, click Install *QA*Center Products.**

3 **Click Install TrackRecord.**

Note   If your system contains older Windows files, a message will appear prompting you to replace those files becauseTrackRecord requires newer versions of some standard Microsoft support files. Your system will automatically reboot before proceeding.

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4   Read the welcome screen and click Next.

The Software License Agreement dialog box appears.

5   Read the license agreement and click Yes to accept the terms of the agreement.

6   In the Setup Type dialog box, select Install TrackRecord Server.

7   On the same dialog box, select a location for the installation.

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

◇ To choose an installation path different from the displayed default path, click the **Browse** button and select an existing folder or type the path name in the Path field. Click **OK**.

Click **Next**. The User Information dialog box appears.

8   Type your name and company in the Name and Company fields. Click Next.

9   Select the components you want to install:
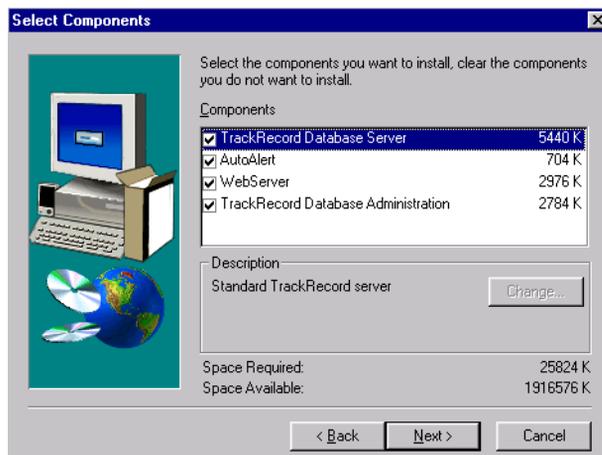
◇ **TrackRecord Database Server**: All sites require at least one database server.

◇ **AutoAlert**: This enables the email notification service. Highlight the component and click the **Change** button to select the components to be installed. Options include the AutoAlert Server, AutoAlert Administration Utility, or Help files. Click **Continue**. To install AutoAlert on a different PC, run the Setup program on that PC and install just the AutoAlert component. To allow remote administration, run the Setup program on that PC and use the TrackRecord Client installation to install only the Administration utility without installing the

server. After installation, refer to "Configuring TrackRecord AutoAlert" on page 23 for additional information.

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

◇ **WebServer**: This option will not be displayed unless a supported WebServer (such as Microsoft IIS) is installed on this PC. The WebServer allows access to the TrackRecord database through a Web browser. After installation, refer to "Configuring TrackRecord WebServer" on page 19 for additional information.

◇ **TrackRecord Database Administration**: Highlight the component and click the **Change** button to select the components to be installed. Options include the Database Administration Utility, Sample Database, and Blank Database. Click **Continue**. If you do not install the Sample or Blank database, you will not be able to create new databases using this utility. You could, however, copy an existing database.

Note   To install the Database Administration Utility on a different PC to allow remote database administration, run the setup program on that PC and use the TrackRecord client installation. See "Installing a TrackRecord Client" on page 11.

Click **Next**.

10 **On the Server Configuration dialog box, select Windows NT or Netware installation.**

Note   If you are using Windows 2000, select the Windows NT option.

For NT, enter the DNS name of this PC. Generally, the machine name is sufficient, but in some network configurations the fully qualified DNS name might be required. You can determine the PC name from the Settings\Control Panel\Network\Identification properties option. For Windows 2000 systems, use the Settings\Control Panel\System properties option. Click **Next**.

11 Enter a Database Name.

Note   If you are using a TrackRecord V4 database, please contact Technical Support for migration information.

Enter the name of an existing database or the name of a database to be created. Use a generic name like "demo" if you plan to experiment with the product before installing it into a production environment.

If you are upgrading from a previous version of TrackRecord and want to continue to use your existing database, you must move the existing database to the TrackRecord Server\Databases directory in the install path you defined in Step 7.

Record the name of the TrackRecord database for use in client installations. Click **Next**.

12 Verify the information on the Start Copying Files screen and click Next.

A status bar shows the progress of the installation.

13 If prompted, restart your PC (strongly recommended) and click Finish to complete installation.

Note for Novell Netware Users

Copy the file CTSRVR.NLM from the TrackRecord installation root directory to the system directory of the Netware server, and the file CTRSRVR.CFG file to the Netware server's root directory.

The TrackRecord server supports the Novell Netware NLM server, which requires the IPX/SPX protocol. Therefore, Netware users must use the Netware client protocol since the Microsoft Windows Client Service for Netware protocol does not support IPX/SPX.

Installing a TrackRecord Client

Install a TrackRecord client if this is a TrackRecord multi-user situation and the server installation has already been performed, or if this is a stand-alone, single-user situation. You must install the TrackRecord client on all PCs whose users will require the TrackRecord windows client. Users who will access the database through the Web client only do not require the TrackRecord client.

To install a TrackRecord client, perform the following procedure:

1 Insert the Compuware CD into the CD-ROM drive.

The CD browser should automatically appear. If it does not, navigate to the root directory and run the setup.exe file.

2 If you are installing TrackRecord from the *QA*Center CD, click Install *QA*Center Products.

3 Click Install TrackRecord.

Note   If your system contains older Windows files, a message will appear prompting you to replace those files because TrackRecord requires newer versions of some standard Microsoft support files. Click **OK** and reboot your system before proceeding.

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4 Read the welcome screen and click Next.

The License Agreement dialog box appears.

5 Read the license agreement and click Yes to accept the terms of the agreement.

6 In the Setup Type dialog box, select Install TrackRecord client and select a location for the installation.

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

◇ To choose an installation path different from the displayed default path, click the **Browse** button and select an existing folder or type the path name in the Path field. Click **OK**.

Click **Next**. The User Information dialog box appears.

7 Type your name and company in the Name and Company fields. Click Next.

8 **Select the components you want to install:**

◇ **TrackRecord**: Highlight the component and click the **Change** button to select the components to be installed. Options include: Program Files, Help Files, Sample Files (script files for ActiveX/OLEDB automation), Sample Templates (files for importing and exporting database data), and Online Books. Click **Continue**.

◇ **TrackRecord Administration**: Highlight the component and click the **Change** button to select the components to be installed. Options include the Database Administration Utility and AutoAlert Administration Utility. Click **Continue**.

Click **Next**.

9 **On the Server Configuration dialog box, select Windows NT or Netware installation.**

Note   If you are using Windows 2000, select the Windows NT option.

For NT, enter the DNS name of this PC. Generally, the machine name is sufficient, but in some network configurations the fully qualified DNS name might be required. You can determine the PC name from the Settings\Control Panel\Network\Identification properties option. For Windows 2000 systems, use the Settings\Control Panel\System\Network Identification properties option.

Click **Next**.

10 **Enter a Database Name.**

Your administrator can supply this name. It must be the same database name as used in the TrackRecord server installation.

Click **Next**.

11 **Verify the information on the Start Copying Files screen and click Next.**

A status bar shows the progress of the installation.

12 **When setup is complete, you may choose whether to view the Read Me file or run TrackRecord. Click Finish to complete the installation.**

Creating Custom Client Installations

TrackRecord allows you to create custom client installations. These custom installations ensure a consistent installation among all the client workstations.

You can create different custom install scripts for different development groups that are customized to its needs. This enables you to choose the level of automation you desire for the client installation— showing the client installer as little or as much as you choose. To create a custom client installation for TrackRecord, follow these steps:

1 **Insert the Compuware CD into the CD-ROM drive.**

The CD browser should automatically appear. If it does not, navigate to the root directory and run the setup.exe file.

2 **If you are installing TrackRecord from the *QA*Center CD, click Install *QA*Center Products.**

3 **Click Install TrackRecord.**

4 **Read the welcome screen and click Next.**

The License Agreement dialog box appears.

5 **Read the license agreement and click Yes to accept the terms of the agreement.**

6 **Choose Set Up Custom Client Installation on the Setup Type window.**

7 **On the same dialog box, select a location for the TrackRecord installation.**

Note   It is recommended that the path you choose is shared for use by other PCs on your network.

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

◇ To choose an installation path different form the displayed default path, click the **Browse** button and select an existing folder or type the path name in the Path field. Click **OK**.

Click **Next**.

8 **The Custom Client Setup Wizard appears and outlines the next series of steps required to finish creating a custom client installation.**

Completion of these steps builds a custom client installation script, which is stored on the path you specified earlier. Click **Next** to dismiss the Wizard information screen.

9 **Specify an installation path.**

To choose an installation path different from the displayed default path, click the **Browse** button and select an existing folder or type the path name in the Path field. Click **OK**. Click **Next** to continue.

10 **Enter name, company, and the network address of the license server information.**

◇ Name and Company – Use generic names, such as department names.

◇ Enter the name and port number of the Compuware License Server, or enter the location of the License File if you are installing an evaluation copy of TrackRecord.

Click **Next**.

11 **Select the components you want this custom installation to install.**

Highlight a component and click **Change** to modify what subcomponents to install. Click **Continue** to return to the previous screen. Click **Next** to continue the installation.

12 **Specify the DNS name of the server on which the TrackRecord database server resides or click Netware for a Netware installation.**

For NT, enter the DNS name of this PC. Generally, the machine name is sufficient, but in some network configurations the fully qualified DNS name might be required. You can determine the PC name on NT systems from the Settings\Control Panel\Network

properties option. For Windows 2000 systems, use the Settings\Control Panel\System properties option. Click **Next**.

Note   If you are using Windows 2000, select the Windows NT option.

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13 **Specify the name of the database you want the client to use after installation. Click Next.**

Use the name of the database you entered in step 11 on page 11 of the server installation.

14 **Choose any installation dialogs that you want displayed during the client's installation.**
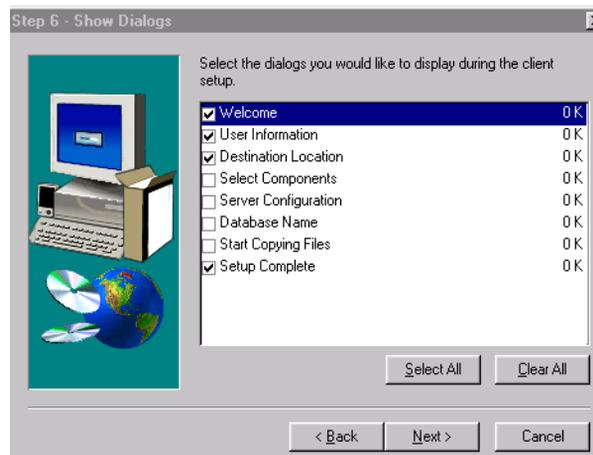
If you want users to enter unique values for Name, for example, click the **User Information** check box. To select all of the dialogs, click **Select All**; to clear all of the dialogs, click **Clear All**. Click **Next.**

15 **Confirm your selections and click Next.**

The Setup program copies the entire TrackRecord CD-ROM setup image, including the custom install script (CLIENT.INI), to the location you specified at the beginning of the installation process. From that point on, users perform client installations by clicking the setup.exe file in this location.

16 **Click Finish.**

Starting the TrackRecord Server

Before starting the TrackRecord server, decide whether you want to run the TrackRecord server as a process or as a service. This decision depends on the machine on which it is targeted to run. Small

development groups may not want to dedicate a machine to run the TrackRecord server; large groups might need the added performance provided by a dedicated machine. See the following descriptions to help determine which method is the best for your circumstances:

◆ **As a process**— The TrackRecord server will operate under a user login account. Use this method if you want the server to run on a dedicated machine to take advantage of its error message display. For additional information, see "Running the Server as a Process" on page 17.

◆ **As a service (default)**— The TrackRecord server will operate under a special system account allowing the server to run while users log on and off the server or workstation. Use this method if the server will run on a non-dedicated machine so that the TrackRecord server will not be disrupted. For additional information, see "Running the Server as a Service" on page 18.

Running the Server as a Process

Running the TrackRecord server as a process allows it to operate under a user login account. When running, it will have a user interface that will display messages when errors occur and it will display an icon on the desktop. TrackRecord will stop when the user account that started it exits.

To Start the Server Process Manually

◆ **Windows NT and 2000**— Open the Start\Programs\Compuware\TrackRecord Server\Server Startup. Minimize the Faircom Server Message Monitor that appears.

◆ **Novell Netware**— Enter load CTSRVR.NLM on the Netware server.

To Shut Down the Server Process Manually

◆ **Windows NT and 2000**— Shutdown the Faircom Server dialog box by clicking the X in the upper right corner. The Faircom Server Shutdown dialog box appears. Enter **ADMIN** as both the user name and password. The password is case sensitive, so you must type it completely in uppercase. Click **OK** twice.

◆ **Novell Netware**— Run CTSTOP.EXE from the Windows NT machine from which you installed the server. Enter ADMIN as the password. The password is case sensitive, so you must type it

completely in uppercase. Then, press Enter for all remaining prompts.

If the machine the server is running on crashes, has a power outage, or for some other reason does not shut down in an orderly fashion, you should rebuild the TrackRecord database. See the *Using TrackRecord* manual for information about rebuilding a TrackRecord database.

Running the Server as a Service

Running the TrackRecord server as a service allows the server to run while users log on and off the server or workstation. It will not have a user interface to display error messages to the desktop and will not provide an icon on the desktop to indicate its presence. TrackRecord will continue to run regardless of user login/logout activity until the PC is shut down.

Because the server defaults to automatic start-up, your system will be setup to run as a service when you install TrackRecord.

Note   You can also have the server run manually when Windows NT starts by double-clicking the Faircom Server in the Services dialog box and changing the type from AUTOMATIC to MANUAL. This means that each time the server machine is rebooted, you have to start the server manually.

To Stop the Server as a Service

1   **Ensure that you are logged into the server machine as the administrator.**
2   **Start the TrackRecord server and confirm that client machines can access the server.**
3   **Shut down the TrackRecord server.**
4   **Follow the platform-specific procedures for stopping the server as a service:**

◇ **Windows NT**: From the Start menu, open Settings\Control Panel. Double-click the Services icon. Select **Faircom Server** from the Services dialog box, and click **Stop**.
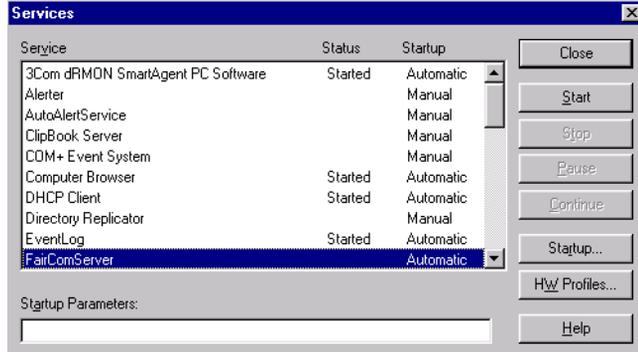
Figure 2-1 This example shows the Windows NT Services dialog box.

◇ **Windows 2000**: From the Start menu, navigate to Settings\Control Panel\Administrative Tools. Double-click the Services icon. Double-click **Faircom Server** from the Services dialog box. Click **Stop** from the Properties dialog box.

Note   To completely remove the service, access a DOS command prompt. Navigate to the TrackRecord server directory and type:instsrv remove. You will see the message *Service deleted*.

To Start the Server as a Service

Repeat the steps for stopping the server as a service, but with the following modification: click the **Start** button on step 4 on page 18.

Networks Behind a Firewall

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

Configuring TrackRecord WebServer

TrackRecord's WebServer allows users to access a TrackRecord database using a Web browser such as Microsoft Internet Explorer or Netscape Navigator. If you are unfamiliar with configuring WebServer software,

consult with someone familiar with these concepts, such as your system administrator. For a complete description of WebServer administrative tasks, refer to the *Using TrackRecord* manual. Consult the "System Requirements" on page 6 to ensure that the WebServer will operate on your system.

TrackRecord WebServer also requires a \cgi-win virtual directory, as described in the following section.

If you are using Microsoft IIS, the account that IIS logs in under must be able to run external components and must have full control access to the \cgi-win directory and the temp directory.

Creating a Virtual Directory

TrackRecord WebServer requires a \cgi-win virtual directory. You should create this virtual directory, as described below, before WebServer is installed. (WebServer installation is described in "Installing the TrackRecord Server, AutoAlert, and WebServer" on page 8.)

If this directory did not exist when WebServer was installed, the installation procedure will create a cgi-win folder on the hard drive. In this instance, configure the virtual directory to point to this directory.

The following sections describe creation of a virtual directory on Microsoft IIS v3.0, Microsoft IIS v4.0, Microsoft IIS v5.0, and Netscape Enterprise Server 3.5.1. For other servers and versions, refer to your WebServer documentation for information about creating a virtual directory.

To Create a Virtual Directory on Microsoft IIS v3.0

1   **From the Start menu, select Programs\Microsoft Internet Server\Internet Service Manager.**

    Ensure that the WWW service is running.

2   **Right-click the WWW service and choose Service Properties. Choose the Directories tab.**

3   **Click the Add button to create a new virtual directory. Map the directory where TrackRecord WebServer is installed.**

    By default the directory is C:\InetPub\cgi-win.

    Ensure that the **Read** checkbox is unchecked, and the Execute (including script) radial button is selected.

4   **Click OK to create the virtual directory.**

5 **Click OK to close the Properties dialog.**

Close the Service Manager.

To Create a Virtual Directory on Microsoft IIS v4.0

1 **Start the Microsoft Management Console.**

Ensure that your Web site is running.

2 **From the Action menu, choose New, then Virtual Directory to start the Virtual Directory Wizard.**

The alias to be used to access virtual directory should be *cgi-win*.

3 **The physical path should be mapped to the directory where TrackRecord WebServer is installed (C:\InetPub\cgi -win by default).**

4 **Ensure that only Allow Script Access and Allow Execute Access are checked.**

5 **Click Finish to create the virtual directory.**

To Create a Virtual Directory on Microsoft IIS v5.0

1 **Right-click on My Computer.**

Select Manager\Services\Applications\Internet Information Services.

2 **Select your Web site, right-click and select the New Virtual Directory option.**

The New Virtual Directory wizard opens.

3 **Follow the prompts to create a directory with the alias *cgi-win*.**

4 **After the directory is created, right-click on the new** \cgi-win **virtual directory and select the Properties option.**

5 **Ensure that Application Protection (at the bottom of the pick list) is set to low.**

6 **Ensure that Execute Permissions are set to "Scripts and Executables."**

Netscape Enterprise Server

All users of Netscape Enterprise Server must take the following steps after running setup in order to run TrackRecord WebServer. The configuration process may differ somewhat from version to version. The following instructions are for Netscape Enterprise Server 3.5.1.

1 **Start Netscape Server Administration to turn the server on.**

2 Click the button labeled with your server name to display the current preferences for this server.

3 Select the Programs button and choose WinCGI Directory.

This will create a directory where Windows CGI programs can be run.

4 Enter "cgi-win" as the URL prefix and type in the path to your *cgi-win* directory in the WINCGI Directory field.

Click **OK** to add the *WINCGI* directory.

Running in Interactive Mode

The WebServer can be run from either the launching user's account or from the interactive user's account.

Running the WebServer in interactive mode often presents fewer problems due to inappropriate security settings unless you require that the WebServer be accessible without a logged-on user.

To set the user account from which WebServer will be run, do the following after installation:

1 From the Start menu, click Run and type in *DCOMCNFG*. Click OK.

2 The Distributed COM Configuration Properties dialog box appears.

From the Applications tab, select *TRWebDB.TRWebDBHost*.

3 Click Properties.

4 Open the Identity tab and ensure that the user account is set to *The interactive user*.

Also, a user with administrator privileges to the database should be logged while the WebServer is running. Administrator privilege will allow the WebServer to work where the Launching User's permissions will not. Click **Apply**. Click **OK**.

Note   If you require that the WebServer be accessible without a logged-on user, set the user account to "The Launching User" and attempt to access the WebServer. If you receive an error message, contact Compuware Technical Support for assistance.

---

5 Repeat Steps 2 through 4 for *TRWebSessionsHost.UserInfo*.

6 Click OK to exit the dialog screen.

7   **If running in interactive mode, ensure that World Wide Web Publishing Service is set to interact with the desktop.**

   ◇ **Windows NT**: Verify by going to the **Start** menu, then Settings\Control Panel\Services. Double-click on **World Wide Web Publishing Service**. Ensure that a checkmark is next to Log On As: Allow Service to Interact with Desktop. Click **OK**.

   ◇ **Windows 2000**: Verify by going to the **Start** menu, then Settings\Control Panel\Administrative Tools\Services. Double-click on **World Wide Web Publishing Service**. Ensure that a checkmark is next to Log On As: Allow Service to Interact with Desktop. Click **OK**.

Client Setup

WebServer requires that Java and Javascript be enabled in the client's browser. For Netscape users, from the **Edit** menu select **Preferences**. click the **Advanced** group and check the **Enable Java** and **Enable JavaScript** options.

Configuring TrackRecord AutoAlert

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

Using SMTP Mail Services

TrackRecord AutoAlert users can choose to use SMTP as their underlying mail service. Using SMTP precludes the need to use the Collaborative Data Objects libraries from Microsoft (CDO.DLL). SMTP provides the ability to use non-Microsoft mail servers, such as Lotus Notes, or UNIX-based mail servers.

To Run AutoAlert with SMTP:

1   **Start the AutoAlert Service.**

   Navigate to Start\Programs\Compuware\TrackRecord\AutoAlert.

2   **In the Set AutoAlert Password dialog box, set a password by typing it in the appropriate fields.**

   To not use a password, leave the fields blank. Click **OK**.

3   **Click Options.**

4 **Place a checkmark next to the Use SMTP option.**

5 **In the From Account field, enter the email address from which AutoAlert emails will come (e.g. xxxx@mycompany.com).**
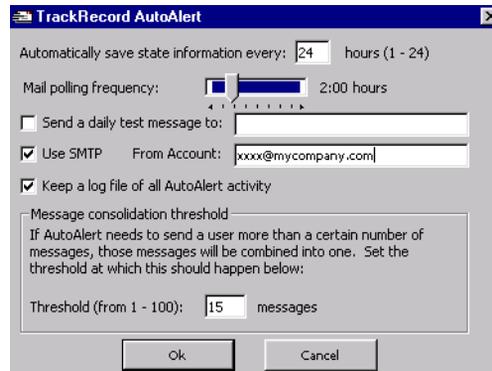
Click **OK**.

6 **Click Add Database.**

Type the username, password, and an existing database name in the appropriate fields. Click **OK**.

7 **Click Exit.**

Using Microsoft Outlook (MAPI)

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

To Configure an AutoAlert Mailbox and Profile

1 **On the machine on which the AutoAlert Server is installed, log on as a user who is a member of the domain in which the service will run.**

2 **Using your preferred information service, such as the Microsoft Exchange Server, create a mailbox for AutoAlert's use.**

It is recommended that you create a mailbox for AutoAlert's exclusive use. AutoAlert email notices are sent from this mailbox. Consult your mail service's documentation for instructions on creating mailboxes.

3 **Navigate to the Start\Settings\Control Panel. Double-click on the Mail option.**

4 **On the Services tab, click the Show Profiles button.**

◇ If a profile named AutoAlert is listed, skip to Step 5.

◇ If a profile named AutoAlert is not listed:

      i   Click the **Add** button to start the Profile Wizard.

      ii   Check the appropriate Information Service, typically Microsoft Exchange Server. Click **Next**.

      iii   For the Profile name, enter the name **AutoAlert**. Click **Next**.

      iv   Enter the name of your **Exchange server** and a **mailbox** name. Click **Next**.

      v   A dialog box appears asking if you travel with this PC. Select **Yes** to enable the user to read and compose mail while not connected to the network. If you select **No**, you will not be able to read or compose mail without a network or modem connection. Click **Next**.

      vi   Click **Finish** to exit the dialog box.

      vii Click **Close**.

5   Access Outlook using the profile you created in Step 4 and attempt to send a message. If you are not successful, contact your Exchange administrator for assistance before continuing.

Use of Outlook for testing is optional but recommended.

6   Open the Services dialog box.

◇ **Windows NT**: Navigate to Settings\Control Panel\Services from the Start menu. Select **AutoAlert Service** and click the **Startup** button.

      i   In the Startup Type box, select **Automatic**. This step is optional, but recommended.

      ii   In the **Log On As** box, check the **This Account** option and enter information for the account you logged into in Step 1 on page 24.

      iii   Click **OK** to close the Startup dialog.

      iv   Select the AutoAlert Service and click the **Start** button.

      v   The AutoAlert Service may take up to a minute to start when it is first started. Click **Close** when complete.

◇ **Windows 2000**: Navigate to Settings\Control Panel\Administrative Tools\Services from the Start menu. Double-click on the **AutoAlert Service**.

      i   In the Startup Type box, select Automatic. This step is optional, but recommended.

      ii   Click **Start**. Click **Apply** and **OK** to close the Startup dialog.

To construct databases to be monitored, and to learn about all AutoAlert administration tasks, refer to the *Using TrackRecord* manual.

Troubleshooting AutoAlert

If AutoAlert is not working, the user account under which AutoAlert logs in might not have sufficient privilege. Increase this user account's privilege settings. (Setting a user account for AutoAlert to log in as is described in "To Configure an AutoAlert Mailbox and Profile" on page 24.)

Allow AutoAlert to log in as the System account and do the following:

1   **Open the Registry Editor by selecting Start\Run\Regedit.**

2   **In the Registry Editor dialog box, choose HKEY_LOCAL_-MACHINE\SOFTWARE\Compuware\TrackRecord AutoAlert group.**

Note   This group will not exist until an attempt has been made to start AutoAlert.

3   **Create a new registry variable by right-clicking and selecting New/String value.**

Name the registry variable *ExchangeServer* (one word). Double-click on the variable you just created. In the dialog box that appears, type the name of your Exchange server in the Value data field. Click **OK**.

4   **Create an additional registry variable named *Mailbox* using the same procedure as step 3.**

In the Value data field, type the alias name you specified when AutoAlert's mailbox was created. If you do not know the alias name, open Microsoft Outlook's Address Book and double-click on the AutoAlert account. The General tab's Alias field contains the mailbox alias.

5   **Start the AutoAlert Administrator.**

Uninstalling TrackRecord

You can uninstall the TrackRecord server, the client, and the Compuware License Manager. Uninstalling TrackRecord will *not* delete your TrackRecord database.

To Uninstall TrackRecord

1   **From the Start\Settings\Control Panel, select Add/Remove Programs.**

2   **Click the Change/Remove button. The Confirm File Delete
dialog box appears. Click Yes to confirm the deletion and click
OK when the uninstall is succesfully completed.**

Click **OK** to exit the Add/Remove Programs dialog box.

**Caution: Deleting the Compuware TrackRecord Server also deletes the
AutoAlert Server and the WebServer.**

---

3   **It is recommended that you restart your machine to remove
files that were in use during uninstall.**

Chapter 3
Reconcile Installation

Reconcile is a requirements management system that allows a project team to create, change, track, and report on project requirements. Reconcile maintains project information, such as a requirement's name, description, ID, author, audit trail, links between this and other requirements, keywords, tests and associated defects, in a relational database. Reconcile creates a set of database entries for each requirement. Reconcile requires the installation of a server and client(s). For production use, Reconcile also requires the creation of a shared database on the Reconcile Server machine. This chapter contains information on the following:

◆ **System Requirements —** Determining the Hardware, software, and system components you will require for Reconcile Installation.

◆ **Installing the Reconcile Server —** For multi-user access, installing the Reconcile Server.

◆ **Creating a New Database —** Creating a shared database on the Reconcile Server machine. Client installations include a sample database that can be used to become familiar with Reconcile.

◆ **Identifying a New Data Source for the Web Service —** Adding a DSN for the database created.

◆ **Installing a Reconcile Client —** You must install the Reconcile client on all computers on which users will require access to Reconcile through the windows client.

◆ **Uninstalling Reconcile —** Uninstalling Reconcile will *not* delete the Reconcile database.

Note   If you are ready to install Reconcile, we assume that you have already installed the Compuware License Manager. It is not necessary to install the Compuware License Manager if you are installing an evaluation copy of Reconcile.

System Requirements

Reconcile requires the following minimum system components.

Reconcile Server:

◆ Microsoft Windows 2000, Windows NT Server or Workstation 4.0 or above with TCP/IP network protocol software

◆ A minimum of 32MB total system memory

◆ 20MB of free disk space, plus room for database expansion

◆ Microsoft Word 97 or higher, since web generation does require Microsoft Word

Reconcile Client(s):

◆ Mouse

◆ A minimum of 640 x 480 display

◆ Windows 95, Windows 98, Windows 2000 or Windows NT 4.0 or above

◆ Microsoft Word 97 or higher

◆ Microsoft Internet Explorer 4.0 or above

◆ A minimum of 32MB total system memory

◆ For integration with QADirector, QADirector 4.4 or later

◆ For integration with TrackRecord, TrackRecord 6.0 or later

Installing the Reconcile Server

You must install the Reconcile Server for multi-user access to the Reconcile database. For single-user installations, installation of the

Reconcile Server is not required. You can install the Reconcile client and create a local database.

Note   The Reconcile Server must be updated with each product release.

To Install the Reconcile Server

1 **On the system on which the Reconcile Server will be installed, insert the installation CD to start the installation procedure.**

2 **If your system data access components must be updated, a message will display.**

   You will be prompted to reboot the system after component installation.

3 **Read the Welcome screen and click Next.**

4 **Read the License Agreement and click Yes.**

5 **When prompted for a setup type, choose Install Reconcile Server and click Next.**

   Optionally, click **Browse** to change the installation directory.
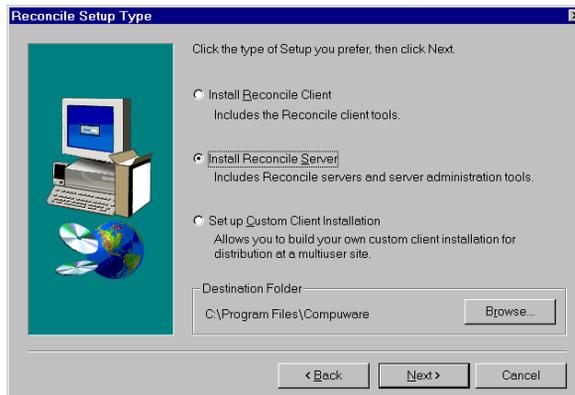
Figure 3-2 Setup Type Dialog

6 **On the User Information dialog, enter your user name and company name. Click Next.**

7 **On the Select Components dialog, select the components to be installed.**
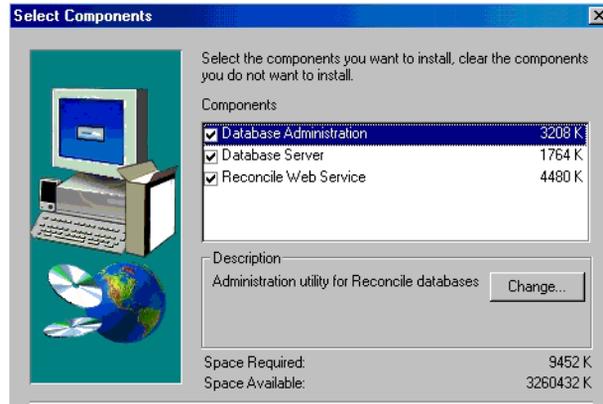
Figure 3-3 Select Components Dialog

Click **Change** to view the optional sub-components of each main component. The following is a description of each of the main components:

◆ Database Administration ─ An administration utility for Reconcile databases

◆ Database Server ─ The Reconcile Database Server

◆ Web Service ─ The Web Service component provides for the auto-generation of web pages from project documents and reports. The Web Service component contains the template (.HTML) and graphic (.GIF,.JPG) files that are used to generate web pages. These files are installed into the **Program Files\Compuware\Reconcile\Web** directory.

◇ To use Reconcile's web publishing feature, you must install the Web Service component.

◇ The Web Service can be installed on the same machine as the Reconcile Server or on a different machine.

◇ To produce internet-accessible web pages, the Reconcile Web Service needs to be installed on a server that can be accessed through the internet.

As an administrator, you can determine whether or not you want client machines to have the Update Web feature in Reconcile enabled. When a user selects the Update Web feature in the Reconcile application, Reconcile automatically updates Project web pages on a daily basis. You may want to enable the Update Web feature on client machines so that client users can automatically update the web pages for their project documents and reports. If

you want to enable the Update Web feature on client machines, follow these steps:

◇ Create a database with a default Web Service directory of **\\Reconcile\Web**

◇ Create a new **\\Reconcile\Web\Templates** directory

◇ Copy the **template files** from **Program Files\Compuware\Reconcile\Web\Templates** into this new directory.

Caution: You will not be able to copy the template files from ProgramFiles\Compuware\Reconcile\Web\Templates until you have completed the Reconcile Server and the Web Service component Installation.

---

8   **Verify the information on the Start Copying Files dialog and click Next.**

A status bar shows the progress of the installation. A Setup Complete message will display when installation is complete. Click **Finish**.

After installing the Reconcile Server and its components, complete the following task:

9   **Create and share a directory for your Reconcile production database files.**

Optionally, create multiple directories, depending on the directory structure you require for storage of project files and web files. For multi-user access to the Reconcile database, you must share the database directory.

Creating a New Database

Client installations include a sample local Access database that can be used to become familiar with Reconcile, but for production use, you must create a shared database on the Reconcile Server machine.

You can create as many databases as you require, but project information cannot be split across multiple databases. All information about one project must be stored in one database.

To Create a New Database

1   Log on to the machine on which the Reconcile Server is installed.

You must log in as a user with administrator privileges on this machine.

2   On the Start/Programs/Compuware/Reconcile menu, select Database Administration.

The **Reconcile Database Creation Wizard** opens. A welcome screen may be displayed; if so, click **Next**.

3   Specify whether you are creating a Microsoft Access or Microsoft SQL Server database, indicate whether the Demo project should be included, and click Next.

By default, the Demo project is included in new databases. To omit the Demo project, uncheck the **Include Demo Project** option.

If you are creating an Access database, go to **step 4**. If you are creating a SQL Server database, skip **step 4**, and go to **step 5**.

4   Access only: To create an Access database, Microsoft Access is not required. Reconcile installs the database engine components required for creation of a Reconcile database.

◇   Enter a name for the new database and click **Next**.

`Reconcile.mdb` is the default database created by Reconcile.

◇   Enter a path to the database and click **Next**

◇   Browse to or enter the name of the shared directory created in the previous section.

If a database exists in this location with the same name as the name specified on the previous dialog, a warning will be displayed advising you that the database files will be overwritten. Click **Yes** to overwrite; click **No** to enter a new path or new database name.

5   SQL only: To create a SQL database, a SQL Server must be installed and accessible through your network.

◇   Use your SQL Server administrator program to create a new SQL database, if an appropriate database does not already exist.

Tip For more information on creating a DSN, visit Microsoft at www.microsoft.com

◇   Create a system data source name (DSN) on the Server machine that points to the desired SQL Server database. If an appropriate DSN has not been created, click the **DSN** button to access the open database connectivity (ODBC) Data Source Administrator.

If you are unable to find the ODBC, do a search on the machine.

Caution: Be sure to create a system DSN and not a user DSN.

◇ Once you have created the DSN, continue with Reconcile database creation.

6 **Enter the default location for this database's project files and click Next.**

Project files such as documents and templates for each project created in this database will be stored in this location, unless an alternate location is specified in the project properties. The specified directory will be the parent under which subdirectories will be created for each project's files.

For a shared (production) database, you must enter a UNC path. The format for a UNC path is $\backslash\backslash machinename\backslash sharename\backslash path$. Selecting the path through the **Browse** button and browsing the **Network Neighborhood** to select the shared directory will automatically generate a UNC path. Note that selecting the path through your local drive letter under My Computer will *not* automatically generate a UNC path.

7 **Enter the default location for this database's web files and click Next.**

The specified directory will be the parent under which subdirectories will be created for each project's web files.

Documents, reports, and requirements that are published to the web are formatted in HTML and placed in folders in this directory, unless an alternate directory is specified in the project properties. By default, the web directory is created under the directory specified on the previous screen, but you can enter any valid directory path.

Multiple databases may share a web directory, allowing users to access project web sites through one Welcome screen, regardless of the database in which the projects are created.

For a shared (production) database, you must enter a UNC path. The format for a UNC path is $\backslash\backslash machinename\backslash sharename\backslash path$. Selecting the path through the **Browse** button and browsing the **Network Neighborhood** to select the shared directory will automatically generate a UNC path. Note that selecting the path through your local drive letter under My Computer will *not* automatically generate a UNC path.

8 Click the Save the Current Settings as Default option to use the current settings as the default when the Database Creation Wizard is next accessed.

9 Click Finish.

The database is created.

Identifying a New Data Source for the Web Service

To use Reconcile's web publishing features, you must identify the databases that Reconcile will monitor for data to be published to the web. You can perform this procedure at installation or at any time before the web features are to be used.

To Identify Data Sources for the Web Service

1 On the Web Service, add a data source name (DSN) for the database created in the last section.

Use the ODBC Data Source Administrator to add a User or System DSN for the shared Reconcile database.

2 Run the WebDSN.exe utility, which is in the Reconcile installation directory's Reconcile\bin directory, on the Web Service.

This utility lists all DSNs on this Server. Add the new DSN to be monitored for information to be published to the web and click OK.

If you install the Web Service on multiple machines, you must set up DSNs and run this utility on each Web Service machine.

Installing a Reconcile Client

You must install the Reconcile client on all computers on which users will require access to Reconcile through the windows client. Users who will access the Reconcile database through the Web client only do not require the Reconcile client.

To Install a Reconcile Client

1 For each client machine, repeat the installation procedure described in the previous section, selecting Install Reconcile Client on the setup type dialog.

2   On the Select Components dialog, choose the components to be installed.

Choosing **Database** creates a database on this machine for your personal use. Other users will not be able to access this database. To share the Reconcile database with other users, you must use the Server installation procedure described in the previous section. Creating a local database allows users to learn about Reconcile using a local copy of the Demo project.

Click **Change** to review specific components installed with each option.

3   Verify the information on the Start Copying Files dialog and click Next.

A status bar shows the progress of the installation. A Setup Complete message will display when installation is complete.

4   Choose whether to run Reconcile now and click Finish.

The default username/password for Reconcile is Admin/admin.

5 **If using a shared database, set up a data source name (DSN) for the shared database.**

On each client machine, you must use the ODBC Data Source Administrator to add a User or System DSN for the shared Reconcile database.

Note   If you create a local (unshared) database, Reconcile will automatically add the DSN Reconcile to the user's DSN list. Select a different name for the shared database or, to use the DSN "Reconcile" to refer to the shared database, in the ODBC Data Source Administrator click Configure to change the target of the Reconcile DSN. All DSNs will be listed in the Reconcile login dialog's DSN list.

Uninstalling Reconcile

You can uninstall the Reconcile Server, the Reconcile client, and/or the Compuware License Manager. Uninstalling Reconcile will *not* delete your Reconcile database.

To Uninstall Reconcile

1 **From the Start/Settings/Control Panel, select the Add/Remove Programs option.**

2 **Select Compuware Reconcile to delete the client; select Compuware Reconcile Server to delete the server; select Compuware License Manager to delete the License Manager.**

Deleting the Compuware Reconcile Server also deletes the Web Service and the Reconcile client.

3 **Click OK.**

If the system contains a Reconcile database, you will be prompted to retain or delete the database.

4 **Click the Reboot Now option (if prompted) and click OK.**

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