

TrackRecord

Installation and Configuration Guide

Release 06.02



Technical support is available from our Technical Support Hotline or via our FrontLine Support Web site.

Technical Support Hotline:
1-800-538-7822

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

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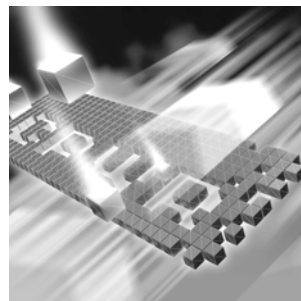


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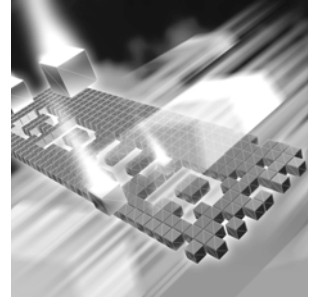
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Introduction



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- ◆ Related Publications
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Who Should Read This Guide

This guide is intended for administrators who are installing or configuring QACenter products; it does not contain reference or usage information. You can find that information in your product's online help facility and documentation set.

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

Related Publications

The following publications are provided in PDF format only. You can access the online versions of these books from the installation bookshelf (as described below) or from Compuware's FrontLine Customer Support Web site at <http://frontline.compuware.com>:

- ◆ The *License Installation Guide*, which contains instructions for licensing your QACenter product.

To access these online books:

- 1 Insert the QACenter CD into the CD-ROM drive. If the CD browser does not automatically start, navigate to the CD's root directory and run `setup.exe`.
- 2 Click **View QACenter Documentation**. The documentation bookshelf opens in Acrobat Reader. (If necessary, Acrobat Reader can be installed from the QACenter CD by clicking **Install 3rd Party Software**, then clicking **Install Adobe Acrobat Reader**.)
- 3 From the bookshelf, select the installation guide that you wish to view.

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

- 1 Open a web browser and go to: <http://frontline.compuware.com>. The Welcome to FrontLine page appears.
 - 2 On the right side of the page, enter your login ID and password and click the **Login** button.
- Note:** If you are a first-time visitor, click the **Register** button to receive your free password to access FrontLine. After you complete the registration form, your login ID and password will be e-mailed to you and your account will be activated.
- 3 From the drop-down list in the center of the page, select a product and click the **Go** button. You will see the product's FrontLine home page, where you can access documentation, technical information, fixes, and other support items.

Getting Help

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

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

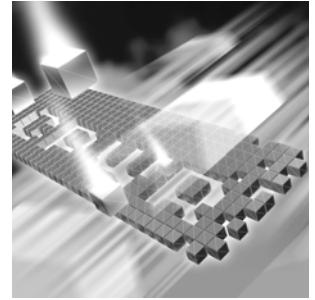
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Chapter 1

Getting Started



- ◆ Overview
- ◆ Installation Types
- ◆ Before Installation

Overview

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

Compuware Central: An HTML-based component that provides a Web framework for managing and performing testing efforts from the beginning to the end of a project. Compuware Central supports a complete, seamless testing process from requirements management to test execution to results analysis and defect tracking. Because it is Web-based, Compuware Central supports remote testing for those organizations whose testing and development teams are not in the same geographic location. Compuware Central's flexibility allows small to large companies to customize it according to their needs.

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

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

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

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

TestPartner: Tests Web- and Windows-based applications that use Microsoft technologies. You can record user sessions with the application, add validation functions, and replay the sessions later to ensure that the application works as expected. TestPartner's scripting language is Visual Basic for Applications (VBA); it supports testing of Java, Visual Basic, and Visual C++ applications; browser-based Web applications; and COM components including both ActiveX controls and automation objects.

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.

WebCheck: Checks the quality of even the largest web sites. WebCheck automatically scans a web site for more than 50 potential types of problems and provides 19 HTML reports. WebCheck is integrated with QARun and QADirector and can be used as a stand-alone product.

In addition to the QACenter suite of products, the QACenter CD includes Adobe Acrobat Reader, Microsoft Internet Explorer, Java 2 Runtime Environment, and Microsoft Virtual Machine installation programs. To install one or more of these products from the QACenter CD, click **Install 3rd Party Software**, then click on the product installation you would like to perform.

Installation Types

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

Initial Installation: An initial installation is the first-time installation of a product on your computer.

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

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

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

Upgrade: Normally, an upgrade to a new release of a product does not require that you uninstall the current release first.

Before Installation

Before installing any QACenter product, you should carefully review the following information:

System Requirements

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

Release Notes

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

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

To access the Release Notes from the QACenter CD, follow these steps:

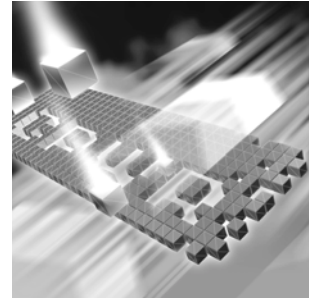
- 1 Insert the QACenter CD into the CD-ROM drive. If the CD browser does not start automatically, navigate to the CD's root directory and run `setup.exe`.
- 2 Click **View QACenter Release Notes**. The Release Notes open in your default web browser.
- 3 Read the Release Notes online, or print the document.
- 4 After reading and/or printing the Release Notes, close the document to return to the CD browser.

To access the Release Notes on FrontLine, follow these steps:

- 1 Open a web browser and go to: <http://frontline.compuware.com>
The Welcome to FrontLine page appears.
- 2 On the right side of the page, enter your login ID and password and click the **Login** button.
Note: If you are a first-time visitor, click the **Register** button to receive your free password to access FrontLine. After you complete the registration form, your login ID and password will be e-mailed to you and your account will be activated.
- 3 From the drop-down list in the center of the page, select a product and click the **Go** button. You will see the product's FrontLine home page.
- 4 On the left side of the product's homepage, select the **Documentation** link. You will see the product's documentation page, which includes links to Release Notes and other documentation types.
- 5 Click the **HTML** or **PDF** icons to view documents.

Chapter 2

Installing TrackRecord



- ◆ Planning Your Installation
- ◆ System Requirements
- ◆ Minimum Release Requirements for Integrated Tools
- ◆ Installing TrackRecord
- ◆ Configuring TrackRecord WebServer
- ◆ Configuring TrackRecord AutoAlert

Planning Your Installation

TrackRecord consists of separate components for defect and project tracking. Not all components are required for every environment. [Table 2-1](#) on page 14 describes what each component does, and why and where it should be installed. Please refer to this table to determine which components are appropriate for your defect and project tracking requirements. [Figure 2-1](#) and [Figure 2-2](#) provide two typical configuration scenarios. For supported operating systems and minimum system requirements for each component, see [“System Requirements”](#) on page 16.

After reviewing this section, carefully follow the instructions in [“Installing TrackRecord”](#) to ensure that you install only those components appropriate for your tracking needs.

Table 2-1. TrackRecord Installation Components

| Component | Purpose | Where to Install |
|---|---|---|
| TrackRecord Windows Client (This component is the default and is always installed) | A user running the TrackRecord client software accesses the TrackRecord database by logging in from client machines anywhere on your network. | Install on any machine that will access the database server. |
| Optional Components | | |
| Database Server (FairCom) | Accepting input from multiple users, the server will periodically check the database for new information and update users through the use of queries. | If you have a license to use TrackRecord on multiple PCs, you can install TrackRecord's database server on a dedicated PC to act as your server and perform a TrackRecord client installation on each workstation that will access the server. The server will house the database and will share it with the client workstations. This component can be installed on a central server on your network. A minimum of one server must be installed on a network for database access. |
| AutoAlert | Enables TrackRecord's email notification service that provides users an email summarizing changes that might be of interest to them. | AutoAlert must be installed on the database server machine. |
| WebServer | Allows access to the TrackRecord database through a Web browser. | This component can be installed on a central server on your network. WebServer users access the database by logging in using standard Web browsers, such as Microsoft Internet Explorer. |
| For a description of additional optional components, see "Installing TrackRecord" on page 18. | | |

Figure 2-1. Configuration Example #1

Server Machine with:

- ◆ TrackRecord Windows Client
- ◆ Database Server
- ◆ AutoAlert (optional)
- ◆ WebServer (optional)



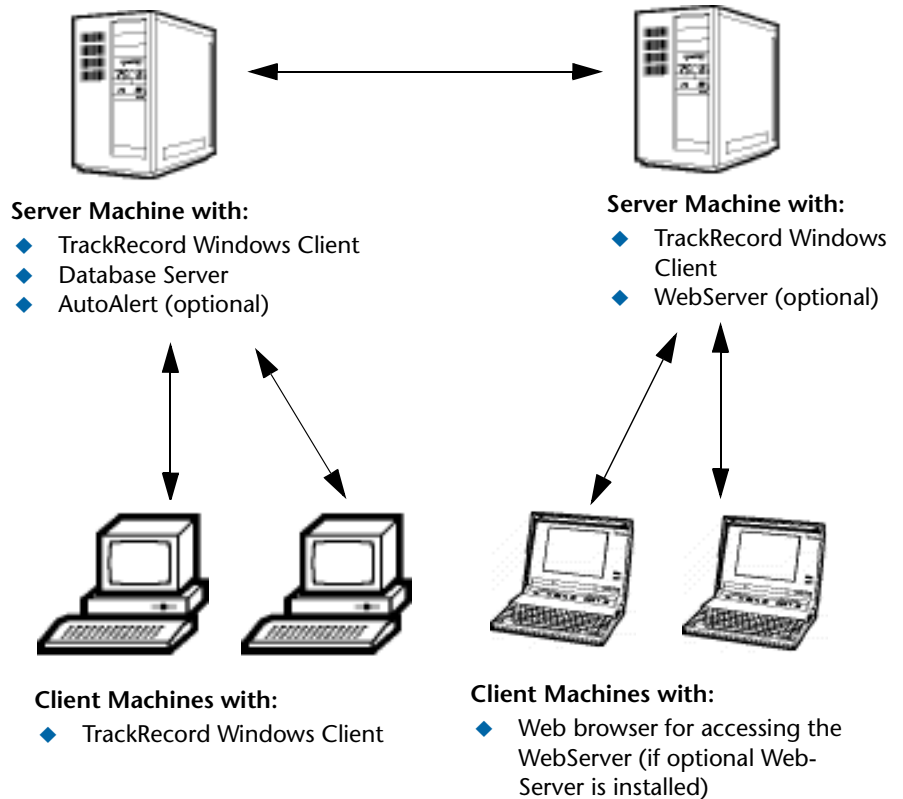
Client Machines with:

- ◆ TrackRecord Windows Client

Client Machines with:

- ◆ Web browser for accessing the WebServer (if optional Web-Server is installed)

Figure 2-2. Configuration Example #2



System Requirements

This section describes the minimum requirements for running the TrackRecord Windows Client. For more information on the components of TrackRecord, see [Table 2-1](#) on page 14.

Client Requirements

- ◆ Mid-level Pentium III PC with 256 MB of RAM running either Microsoft Windows 2000, Windows XP Professional (32-bit version only), or Windows Server 2003 (32-bit version only)
- ◆ 180 MB of free disk space
- ◆ Adobe Acrobat or Acrobat Reader to view the online books in PDF format
- ◆ Microsoft Internet Explorer 5.01 or later

- ◆ TCP/IP client software
- ◆ 800 x 600 display
- ◆ Installing and using TrackRecord requires full administrative rights.

Web Browser Requirements

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

- ◆ Internet Explorer 5.5 or 6.0

Optional Component Requirements

The following sections detail the minimum system requirements necessary for installing each optional TrackRecord component. For more information on the components of TrackRecord, see [Table 2-1](#) on page 14.

Database Server (FairCom) Requirements

All the client requirements listed on [page 16](#), as well as the following minimum system requirements, are necessary to install a server that will house the database. This component can be installed on a central server on your network. A minimum of one server must be installed on a network for database access.

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

AutoAlert Requirements

All the client requirements listed on [page 16](#), as well as the following minimum system requirements, are necessary for installing TrackRecord's email notification service:

- ◆ 40 MB of free disk space
- ◆ A mail system that is either SMTP-compliant or contains a MAPI-compliant client on the PC where AutoAlert is installed. This allows AutoAlert to send messages.

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

WebServer Requirements

All the client requirements listed on [page 16](#), as well as the following minimum system requirements, are necessary for the machine upon which the WebServer component is installed:

- ◆ 45 MB of free disk space
- ◆ One of the following servers installed: Microsoft Internet Information Server (IIS) 5.0, 5.1, or 6.0

Minimum Release Requirements for Integrated Tools

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

- ◆ QADirector 4.5.0 or later
- ◆ Reconcile 1.0.3 or later
- ◆ DevPartner Studio 6.6 and 7.0
- ◆ Abend-AID Fault Manager 2.0 or later
- ◆ Microsoft Project 98 - 2002
- ◆ Microsoft Outlook 97 or later
- ◆ Visual SourceSafe 6.0
- ◆ PVCS Version Manager 6.7
- ◆ MKS Source Integrity Standard Edition versions 7.5B and 7.6

Installing TrackRecord

This section explains the installation process for TrackRecord. Please review the [“System Requirements”](#) on page 16 to ensure that TrackRecord will install and operate properly on your computer.

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

available. To review the Release Notes prior to installation, refer to the “Before Installation” section of the “Getting Started” chapter.

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

Administrative rights are required to install TrackRecord.

If TrackRecord version 6.1.1 or earlier is installed on your computer, or if you have a beta version installed, Compuware strongly recommends that you uninstall the previous version and reboot your PC if prompted before proceeding with this installation.

To install TrackRecord, follow these steps:

- 1 Log on as a user with administrator permissions.
- 2 Insert the QACenter 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.
- 3 Click **Install QACenter Products**.
- 4 Click **Install TrackRecord**.
- 5 Read the welcome screen and click the **Next** button. The License Agreement dialog box appears.
- 6 Read the license agreement and click **Yes** to accept the terms of the agreement. The Customer Information dialog box appears.
- 7 Type your name and company in the **User Name** and **Company Name** fields. Click the **Next** button. The Choose Destination Location dialog box appears.
- 8 Select a location for the installation.
 - ◇ By default, TrackRecord installs in the folder `x:\Program Files\Compuware\TrackRecord` where `x` is the drive where Windows resides on your PC.
 - ◇ To choose an installation path different from the displayed default path, click the **Browse** button and select an existing folder or type the path name in the **Path** field. Click **OK**.

9 Click the **Next** button. The Select Components dialog box appears. This dialog box allows you to select or clear components for installation. Highlight a component to view a brief description.

10 Select the **optional** components you want to install:

- ◇ **Sample Files:** Installs Visual Basic and Delphi code examples as well as an Excel macro that illustrates how to access TrackRecord through its COM interface. In addition, the Excel macro can allow you to build three types of TrackRecord data reports and view them as graphs.
- ◇ **Tools and Add-Ins:** Includes Outlook Task Synchronization and Visual Studio Add-Ins.
 - **Outlook Task Synchronization:** This option will not be displayed unless a supported version of Outlook is installed on this PC. This component allows the use of Microsoft Outlook to import TrackRecord task items into Outlook. In Outlook, you can mark a task as complete and, after synchronization, it will be marked as complete in TrackRecord.
 - **Visual Studio Add-Ins:** This option will not be displayed unless Visual Basic 6.0 or Visual C++ 6.0 is installed on this PC. The Add-Ins allow you to submit a defect or task into the TrackRecord database from within the IDE.
- ◇ **Database Server (FairCom):** This component is required for database access. This component can be installed on a central server on your network. Accepting input from multiple users, the clients will periodically check the database for new information and update users through the use of queries.
- ◇ **AutoAlert:** Enables TrackRecord’s email notification service that provides users an email summarizing changes that might be of interest to them. This component can be installed on a central server on your network.
- ◇ **WebServer:** This option will not be displayed unless a supported WebServer (Microsoft IIS) is installed on this PC. WebServer allows access to the TrackRecord database through a Web browser. This component can be installed on a central server on your network. After installation, refer to “[Configuring TrackRecord Web-Server](#)” on page 22 for additional information.
- ◇ **Administration Utilities:** Includes the AutoAlert Administration Utility, Import-Export Wizard, and Workflow Editor.

Tip: 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.

- **AutoAlert Administration Utility:** Allows you to configure which databases are being polled by the AutoAlert service, identify users that have AutoAlert enabled, and set a variety of AutoAlert options.
- **Import-Export Wizard:** Steps you through the process of importing, exporting, and creating templates. It automates the creation of this template and saves it, making future imports and exports even faster. The Wizard can only be used to create new items in a database, not update existing ones.
- **Workflow Editor:** Used to produce an intuitive diagram of the project workflow and create and edit the workflow.

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

- 11** Enter the name of the server in the **Server** field. Generally, the machine name is sufficient, but in some network configurations the IP address might be required. Consult your system administrator for additional information. Click the **Next** button. The Select Program Folder dialog box appears.
- 12** Specify a location for the TrackRecord program shortcuts. You may type a new folder name, or select one from the existing folders list. Click **Next**. The Start Copying Files dialog box appears.
- 13** Review the summary of settings that you specified and click the **Next** button to start copying the program files. The Setup Status dialog box displays the progress of the installation.
- 14** After the installation is complete, you may be prompted to restart your computer. You may choose to restart it now (recommended) or later.
- 15** Click the **Finish** button to complete the installation of TrackRecord.

Required: If you are upgrading to TrackRecord 6.2 from a release older than 6.1.1, copy the contents of your TrackRecord database folder to the new database folder. This is because the TrackRecord directory structure has changed and databases are now installed in a different default location. By default, this folder is `C:\Program Files\Compuware\TrackRecord\Databases`. Refer to the *TrackRecord Release Notes* for more information.

Where to Go Next

- ◆ The evaluation license (CompuLock) supplied with your Compuware product allows you to install the product and run it for a specific time

period without first installing a license. During this trial period, you will be informed of how much evaluation time remains.

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

- a** Insert the QACenter CD into the CD-ROM drive. If the CD browser does not automatically start, navigate to the CD's root directory and run `setup.exe`.
 - b** Click **View QACenter Documentation**.
 - c** From the bookshelf, select the *License Installation Guide*.
- ◆ If you installed the optional WebServer component, proceed to “[Configuring TrackRecord WebServer](#)” on page 22.
 - ◆ If you installed the optional AutoAlert component, proceed to “[Configuring TrackRecord AutoAlert](#)” on page 27.

Networks Behind a Firewall

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

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

Configuring TrackRecord WebServer

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

Configuration Steps

Follow these steps to configure the TrackRecord WebServer:

- 1 Consult the “[System Requirements](#)” on page 16 to ensure that the WebServer will operate on your system.
- 2 Install the WebServer (optional component). See “[Installing TrackRecord](#)” on page 18.
- 3 Set the user account from which WebServer will be run. See “[Setting Up a User Account](#)” on page 23.

Setting Up a User Account

The WebServer can be run from the interactive user’s account, the launching user’s account, or by specifying a user’s account.

The differences between the settings are as follows:

Table 2-2. WebServer Account Settings

| Account Setting | Description | Note/Caution |
|----------------------------------|--|---|
| This user (recommended) | Allows the WebServer to run using the security context of the specified user’s account. It will then be authenticated in the domain. | The account that is used requires "log on as a service" privileges. |
| Interactive user | Allows the WebServer to run using the security setting of the user who is currently logged in (the interactive user) and does not require administrative rights. The interactive user may be the same as the launching user. For security reasons, Compuware recommends that you create a user account on the server with no administrative rights that is used for a log in. If security is breached, the Admin functions of the Server will not be accessed. | If selected, the WebServer will not start if a user is not logged on. |

Table 2-2. WebServer Account Settings

| Account Setting | Description | Note/Caution |
|-----------------|--|---|
| Launching user | Specifies that the WebServer will run using the security setting of the user who started the WebServer (the launching user). The launching user may be the same as the interactive user. This allows access to the WebServer if there is no active login on the server machine. Although this option appears to be a more secure option, if the security is somehow breached by a malicious attack, the attacker will have access to the entire machine. | The Windows authentication service does not allow an identity that is passed from one computer over the network to be used to access network resources. |

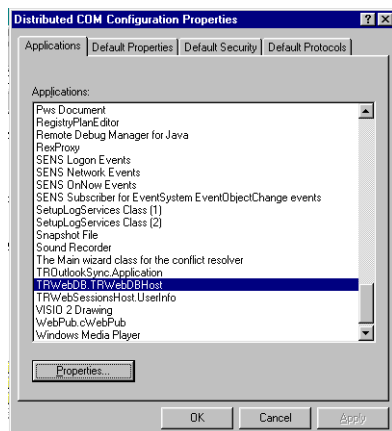
Windows 2000

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

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

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

Figure 2-3. Distributed COM Configuration Properties Dialog Box



- 4 Click the **Identity** tab.

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

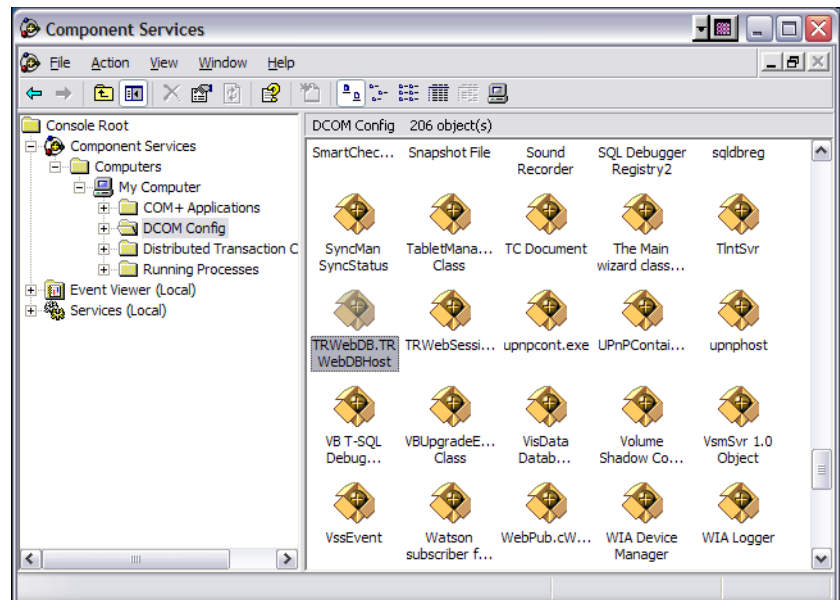
Windows XP and 2003

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

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

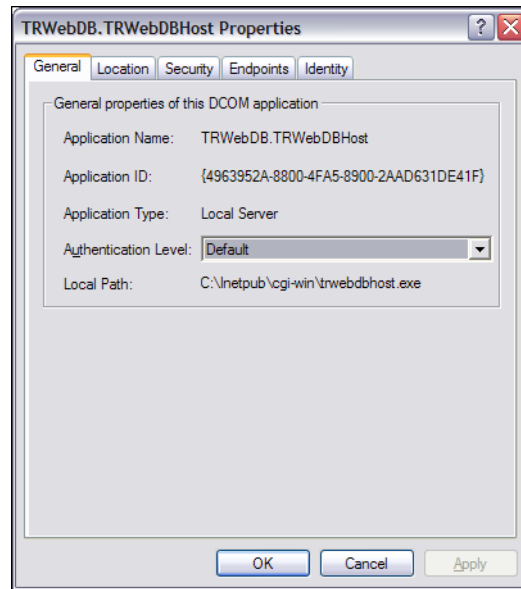
- 1 Click **Start>Run**.
- 2 In the **Open** field, type DCOMCNFG. Click **OK**.
- 3 In the **Component Services** window, navigate to **Component Services>Computers>My Computer>DCOM Config** (see [Figure 2-4](#)).

Figure 2-4. Component Services window



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

Figure 2-5. Properties dialog box



- 5 Click the **Identity** tab.
- 6 Ensure that the user account is set to **This User** (recommended).
- 7 In the **User** field, enter a user account that will be used to run the WebServer or click the **Browse** button to locate an account name. This can be a user or a service account you created to run services.
- 8 In the **Password** and **Confirm Password** fields, enter the password for the specified user account.
- 9 Click **Apply**. Click **OK**.
- 10 Repeat [step 4–9](#) for **TRWebSessionsHost.TRWebSessions**.
- 11 Click **OK**.

Client Setup

WebServer requires that Java and Javascript be enabled in the client's browser.

Configuring TrackRecord AutoAlert

TrackRecord AutoAlert sends email messages to users to notify them of changes in the TrackRecord database. AutoAlert lets you define flexible criteria for notifying each user of changes that might be of interest to them. Consult the “[System Requirements](#)” on page 16 to ensure that AutoAlert will operate on your system.

There are three steps to configuring AutoAlert:

- ◆ “[Configuring an AutoAlert Mailbox and Profile for MAPI](#)” on page 27
- ◆ “[Defining an Email Package](#)” on page 27
- ◆ “[Starting the AutoAlert Service](#)” on page 28

Configuring an AutoAlert Mailbox and Profile for MAPI

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

- 1 On the machine on which the AutoAlert Server is installed, log on as a user who is a member of the domain in which the service will run.
- 2 Using your preferred information service, such as the Microsoft Exchange Server, create a mailbox for AutoAlert’s use.
AutoAlert email notices are sent from this mailbox. Consult your mail service’s documentation for instructions on creating mailboxes.
- 3 Create a profile named `AutoAlert` that has access to the mailbox.
Since access to the mailbox is through a service, the service must run as a user that can access the mailbox.

Defining an Email Package

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

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

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

- 1 On a machine on which the AutoAlert Administration Utility has been installed, from the **Start** menu, choose **Programs>Computerware>TrackRecord>AutoAlert Administration Utility**.
- 2 On the TrackRecord AutoAlert- Servers dialog box, click the **View Server** button to select one of the available AutoAlert servers.
Note: If password protection was selected, enter the password for the AutoAlert server.
- 3 Click the **Server Options** button.
- 4 Click the **Email Package** tab.
For more information on this tab, refer to the *TrackRecord Administrator's Guide* or AutoAlert Administration Utility's online help.
- 5 Select the email option to define what email package will be used to send email messages:
 - ◇ Select **Use MAPI** to use a MAPI profile and user information.
 - ◇ Select **Use SMTP** to enable the AutoAlert server to use SMTP. Enter the name of the SMTP server and the address of the user sending the email (e.g. xxxx@mycompany.com).
- 6 Click the **Apply** button and **OK** when your settings are complete.

Starting the AutoAlert Service

Windows 2000

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

- 6 Double-click the **TrackRecord AutoAlert Service**.
- 7 Click **Start**.
- 8 Click **OK**.

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

Windows XP

- 1 From the **Start** menu, choose **Control Panel>Administrative Tools>Services**.
- 2 Double-click the **TrackRecord AutoAlert Service**.
- 3 If you are using MAPI:
 - ◇ Click the **Log On** tab.
 - ◇ Select the **This Account** option
 - ◇ Enter the name of the user that has access to the specified mailbox. The login format should be *domain\username*. The specified account should have “log on as a service” rights on the network.
 - ◇ Enter and confirm the password.
- 4 Click the **Apply** button.
- 5 Click the **OK** button.
- 6 Close the Services window.

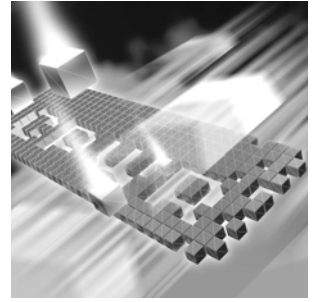
To construct databases to be monitored, and to learn about all AutoAlert administration tasks, refer to the *TrackRecord Administrator's Guide*.

Troubleshooting AutoAlert

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

Chapter 3

Maintaining the Installation



- ◆ Accessing Maintenance Mode
- ◆ Modifying an Installation
- ◆ Repairing an Installation
- ◆ Removing a Product

Accessing Maintenance Mode

There are two methods for accessing a QACenter product's maintenance mode: from the QACenter CD or from the Windows Control Panel.

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

Accessing Maintenance Mode from the Windows Control Panel

- 1 Click the Windows **Start** button and choose **Settings>Control Panel**. The Control Panel window appears.
- 2 **Windows 9x/NT:** Choose the **Add/Remove Programs** icon. The Add/Remove Programs Properties dialog box appears. Select the QACenter product to maintain and click **Add/Remove**.
Windows 2000, 2003, and Windows XP: Choose the **Add/Remove Programs** icon. The Add/Remove Programs dialog box appears. Select the QACenter product to maintain and click **Change/Remove**.

You are presented with the three maintenance mode options: modify, repair, and remove. For more information about these options, see the appropriate section in this chapter.

Accessing Maintenance Mode from the QACenter CD

- 1 In the CD-ROM drive, insert the QACenter CD containing the same version of the product that you have installed. The QACenter CD browser should automatically appear. If it does not, navigate to the root directory and run the `setup.exe` file.
- 2 Click **Install QACenter Products**.
- 3 Click **Install** *product name* (where *product name* is the name of the product that you want to maintain).

You are presented with three maintenance mode options: modify, repair, and remove.

Modifying an Installation

For products with optional components, you may want to add or remove a component.

Rather than uninstall and re-install the product, you can modify your installation.

Modifying Products With Optional Components

- 1 Access maintenance mode using one of the two methods described at the beginning of this chapter.
- 2 Select the **Modify** option. Click **Next**. The Select Components dialog box appears allowing you to add or remove components.
- 3 Click **Next**. Setup will add or remove the appropriate components.
- 4 After modifying, you may be prompted to restart your computer. If you are prompted to restart your computer, you may choose to restart it now (recommended) or to restart it later.
- 5 Click **Finish** to complete the maintenance.

Repairing an Installation

There may be times when you will need to repair a damaged QACenter product installation. This could be due to an inadvertent deletion or corruption of the program. To repair your QACenter product, follow these steps:

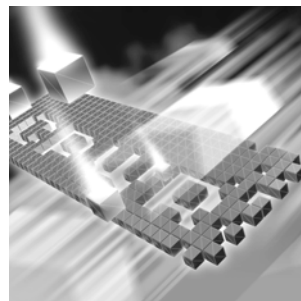
- 1 Access maintenance mode using one of the two methods described in “Accessing Maintenance Mode” at the beginning of this chapter.
- 2 Select the **Repair** option. Click **Next**. Setup will repair the specified QACenter product.
- 3 After repairing, you may be prompted to restart your computer. If you are prompted to restart your computer, you may choose to restart it now (recommended) or to restart it later.
- 4 Click **Finish** to complete the maintenance.

Removing a Product

If you want to remove a QACenter product from a PC, follow these steps:

- 1 Access maintenance mode using one of two methods described at the beginning of this chapter.
- 2 Select the **Remove** option. Click **Next**. The Confirm File Deletion dialog box appears.
- 3 Click **OK**. Setup will remove the specified QACenter product from your PC.
- 4 After uninstalling, you may be prompted to restart your computer. If you are prompted to restart your computer, you may choose to restart it now (recommended) or to restart it later.
- 5 Click **Finish** to complete the maintenance.

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