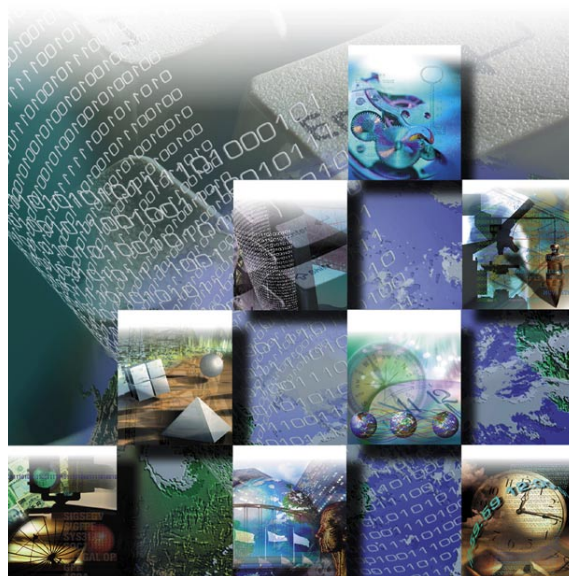

TrackRecord® and Reconcile™ Installation Guide

Windows® 95
Windows® 98
Windows NT®
Windows 2000®

Part Number 10287

September, 2000

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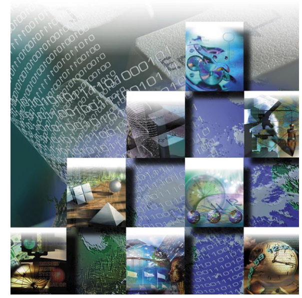
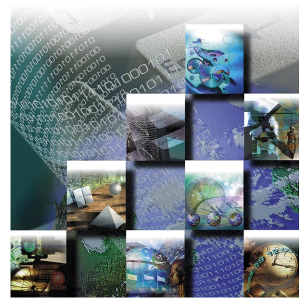


Chapter 1
Quick Install



This chapter provides a brief description of a basic TrackRecord/Reconcile installation. Later chapters provide complete information about all aspects of installation.

Step 1: Installing the License Manager

Permanent TrackRecord/Reconcile installations require a Compuware License Manager (see the separate *License Installation Guide*). For an evaluation (demo) TrackRecord/Reconcile installation, you can skip this section.

To Install the License Manager and License

1. **Copy the** `license.dat` **file you obtained from Compuware to a directory on the target license server computer.**
2. **If you have not installed the License Manager software with a previous Compuware product, from the Compuware distribution CD's Master Setup window click Install License Manager and follow the prompts. On the final screen, ensure that the Install License option is checked.**
3. **From** `Start|Programs|Compuware|License Management`**, select the** `License Administration Utility` **option.**
4. **Click** `Install License` **and enter the name of your Compuware-supplied license file and the Master license file.**

   The LAU writes the information in your `license.dat` file into a master license file. If you use multiple Compuware products, the license information for all products is merged into one master license file.
5. **Click Install License, follow the prompts, and restart your computer.**

Step 2: Installing the Database Server

For a detailed description of all database server installation options, refer to Chapter 2, “TrackRecord Installation.”

To Install the TrackRecord/Reconcile Server Components

1. **From the Compuware distribution CD’s Master Setup window, click Install TrackRecord or Install Reconcile and choose Install TrackRecord Client or Install Reconcile Client from the Setup Type window.**
2. **When prompted for license server information, enter the name and port number of the Compuware License Server, or enter the location of the License File for an evaluation copy.**
3. **When prompted for a Database Name, enter the name of an existing database or the name of a database to be created.**
4. **To start the TrackRecord server, from the** `Start|Programs|Compuware|TrackRecord Server` **menu, select the** `Server Startup` **option (the Reconcile server starts automatically) or see “Starting the TrackRecord Server” on page 23.**

Refer to “Configuring TrackRecord AutoAlert” on page 27 for information on setting up TrackRecord AutoAlert and “Configuring TrackRecord WebServer” on page 31 for information on managing TrackRecord WebServer.

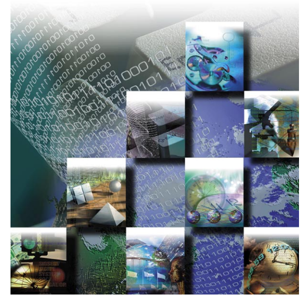
Step 3: Installing a TrackRecord/Reconcile Client

For a detailed description of all client installation options, refer to “Installing a TrackRecord Client” on page 7.

To Install a TrackRecord/Reconcile Client

1. **From the Compuware distribution CD’s Master Setup window, click Install TrackRecord or Install Reconcile and choose Install TrackRecord Client or Install Reconcile Client from the Setup Type window.**
2. **When prompted for license server information, 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.**
3. **When setup completes, choose whether to view the Release Notes file or run TrackRecord/Reconcile. Click Finish.**

Chapter 2
TrackRecord Installation



This chapter describes how to install the TrackRecord server and client.

Overview

TrackRecord network installations consist of:

- A Compuware License Manager running on a server, as described in "The Compuware License Manager" on page 3
- A TrackRecord database server and databases running on a server (the License Manager and TrackRecord database server can run on the same machine)
- Optionally, a TrackRecord AutoAlert Server running on either the same computer as the database server or on another computer
- Optionally, a TrackRecord WebServer running on either the same computer as the database server or on another computer.
- Individual TrackRecord clients running on other computers that access one or more TrackRecord databases
- TrackRecord Web clients, requiring no local software on the client machine

System Requirements

TrackRecord requires these minimum computer setups.

For the TrackRecord Server:

- A computer running either:
  - Microsoft Windows 2000, Windows NT Server or Workstation 4.0 or above 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: CDO.DLL V8.03 or higher on the server. If CDO.DLL is not installed, you can download it from http://www.microsoft.com/exchange/55/downloads/cdo.htm. Refer to “AutoAlert System Requirements” on page 27 for more information about AutoAlert requirements.
- For WebServer: A pre-existing “cgi-win” virtual directory (see “Creating a Virtual Directory” on page 31) and one of the following servers installed:
  - Microsoft Internet Information Server (IIS) 2.0 or above (3.0 with ASP or later recommended)
  - Microsoft Peer Web Services
  - Netscape Enterprise Server 2.0 or above
  - O’Reilly Website or Website Professional

For TrackRecord Clients:

- Mouse
- A minimum of 640 x 480 display
- Windows 95, Windows 98, Windows 2000 or Windows NT 4.0 or above
- Microsoft Internet Explorer 4.0 or above to support HTMLHelp. WebServer access supports Internet Explorer 4.0 or Netscape Navigator 4.5 or above.
- A minimum of 32M total system memory
- TCP/IP or Novell Netware 4.0 client software

Installing the TrackRecord Server, AutoAlert, and WebServer

This section assumes that a Compuware License Manager has previously been installed (unless you are installing an evaluation copy of TrackRecord). If not, refer to “The Compuware License Manager” on page 3.

Before you can run TrackRecord clients, you must install the TrackRecord server on a networked computer. Note that the TrackRecord server must be updated with each product release.

To Install the TrackRecord Server, AutoAlert, and WebServer Software

1 **If you are running a previous version of TrackRecord, uninstall the previous version and reboot your computer before proceeding with this installation.**

2 **Insert the Compuware CD into the computer's CD-ROM drive.**

Alternatively, navigate to a networked drive containing the CD-ROM image.

3 **Click Install TrackRecord from the Compuware distribution CD's Master Setup window.**

Alternatively, run `Setup` from an Microsoft Windows Explorer window that shows the files on the CD-ROM.

4 **If your system contains older Windows files, a message displays. Click Ok to replace those files.**

TrackRecord setup requires newer versions of some standard Microsoft support files. Setup will replace your files with newer versions. You must reboot the system after replacing files.

5 **Click Next to step past the Welcome window and read and accept the License Agreement by clicking Yes.**

6 **Choose Install TrackRecord Server from the Setup Type window.**

Optionally, click **Browse** to choose an installation path different from the displayed default path.

For example, if you plan to install the TrackRecord server on a Novell Netware server, you will need to specify the network path to the Novell Netware machine, most likely via a mapped drive.

7 **Click Next.**

8 **On the next screen enter the following.**

- ◇ The user name and company name of the purchaser of the TrackRecord license

9 **Select the individual server components you want to install.**

The options are:

- ◇ TrackRecord Database Server. All sites require at least one database server.
- ◇ AutoAlert. This enables the e-mail notification service. Click the **Change** button to select the components to be installed – the AutoAlert server, Administration Utility, or Help files. After

installation, refer to “Configuring TrackRecord AutoAlert” on page 27 for additional information.

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

- ◇ WebServer. This option will not be displayed unless a supported Web server (such as Microsoft IIS) is installed on this computer. The WebServer allows access to the TrackRecord database through a Web browser. After installation, refer to “Configuring TrackRecord WebServer” on page 31 for additional information.
- ◇ TrackRecord Database Administration Utility. Click the **Change** button to select the components to be installed – the Administration Utility, Sample Database, and Blank Database. 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.

  To install the Database Administration Utility on a different computer to allow remote database administration, run the Setup program on that computer and use the TrackRecord Client installation, as described in the following section.

10 On the Server Install screen, select NT or Netware installation.

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

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 TrackRecord Version 5 and want to continue to use your existing database, you must move the existing database to the `Track Record Server/Databases` directory in the install path you defined in Step 6 above.

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

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

A status bar shows the progress of the installation.

13 **Click Yes to restart your computer (strongly recommended) and click Finish to complete installation.**

14 **(Novell Netware users only) 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.**

15 **To start the server, from the** `Start|Programs|Compuware|TrackRecord Server` **menu, select the Server Startup option.**

Refer to "Starting the TrackRecord Server" on page 23 for information on starting the TrackRecord server as a service.

Refer to "Configuring TrackRecord AutoAlert" on page 27 for information on setting up AutoAlert and to "Configuring TrackRecord WebServer" on page 31 for information on managing WebServer.

Installing a TrackRecord Client

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

You can also use the Client installation to install the Database Administration Utility and the AutoAlert Administration Utility.

If you will be creating custom client installations, you can skip this section.

To Install a TrackRecord Client

1 **Insert the Compuware CD into the computer's CD-ROM drive.**

Alternatively, navigate to a networked drive containing the CD-ROM image.

The Compuware TrackRecord installation dialog will open.

2 **Click Install TrackRecord.**

Alternatively, run `Setup` from an Explorer window that shows the files on the CD-ROM.

If a custom client installation has been created, users may be asked to supply information for the following steps, or they may see the setup program start copying files.

3 **Click Next to step past the Welcome window and read and accept the License Agreement.**

4 **Choose Install TrackRecord Client from the Setup Type window.**

5 **Enter Name and Company information and click Next.**

6 **Choose the TrackRecord components to be installed.**

◇ Select **TrackRecord** and click the **Change** button. Check the components to be installed – Program Files, Help Files, Sample Files, Sample Templates and Online Books. Sample files are script files for ActiveX/OLEDB automation. Sample templates are template files for importing and exporting database data.

◇ Select **TrackRecord Administration** and click the **Change** button. Check the components to be installed – Database Administration Utility and AutoAlert Administration Utility.

7 **Select the type of server on which your database runs and, if Windows NT, enter the DNS name of the server.**

This name can optionally include a domain name, as in `OurServer.Company.com`. Ask your system administrator if you do not have this information.

8 **Enter the name of your database.**

Your administrator will supply this information.

9 **Review the information presented on the confirmation screen and click Next.**

10 **When setup completes, choose whether to view the Release Notes file or run TrackRecord. Click Finish.**

Note for Novell Netware Users

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.

Creating Custom Client Installations

TrackRecord installation allows you to create custom client installations. These custom installations let you predefine the parameters of an installation to automate TrackRecord Setup.

You can create different custom install scripts for different development groups by repeating the procedure described in the following section. Each time you perform a custom client install setup, specify a unique path.

To Create Custom Client Installs

1. **Insert the Compuware CD into the computer's CD-ROM drive.**

   Alternatively, navigate to a networked drive containing the CD-ROM image.

2. **Click Install TrackRecord from the Compuware CD's Master Setup window.**

   Alternatively, run `Setup` from an Explorer window that shows the files on the CD-ROM.

3. **Click Next to step past the Welcome window and read and accept the License Agreement by clicking Yes.**

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

   Click **Browse** to choose a destination folder into which the setup files will be copied.

Note   Make sure the path you choose is shared for use by other computers on your network.

---

5. **Click Next.**

   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.

6. **Accept the default installation path or click Browse to select another location.**

7. **Enter name, company, and the network address of the license server information and click Next.**

- ◇ 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.

8 **Select the TrackRecord components you want this custom installation to install and click Next.**

Highlight a component and click **Change** to modify what subcomponents, such as Examples, to install.

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

See "Installing the TrackRecord Server, AutoAlert, and WebServer" on page 4 for information about installing the TrackRecord server.

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

Use the name you recorded at the end of server installation.

11 **Choose any installation dialogs that you want displayed during the client's installation. Click Next.**

If you want users to enter unique values for Name, for example, click the **User Information** check box.

12 **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.

13 **Click Finish.**

Uninstalling TrackRecord

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

To Uninstall TrackRecord

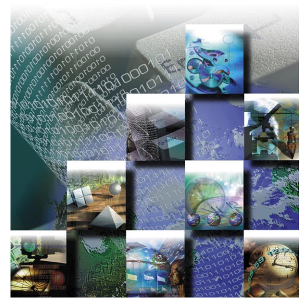
1 **From the Start | Settings | Control Panel, select the Add/Remove Programs option.**

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

   Deleting the Compuware TrackRecord Server also deletes the AutoAlert Server and the WebServer.

3 **Click the Reboot Now option and click OK.**

Chapter 3
Reconcile Installation



This chapter describes how to install the Reconcile server and client.

Overview

Reconcile network installations consist of:

- A Compuware License Manager running on a server
- A Reconcile database server and database(s) running on a server (the License Manager and Reconcile database server can run on the same machine)
- Optionally, a Reconcile Web Server running on either the same computer as the database server or on another computer
- Individual Reconcile clients running on computers that access one or more Reconcile databases
- Reconcile Web clients, requiring no local software on the client machine

System Requirements

Reconcile requires the following minimum system components.

For the Reconcile Server:

- Microsoft Windows 2000, Windows NT Server or Workstation 4.0 or above with TCP/IP network protocol software
- 32MB total system memory
- 20MB of free disk space, plus room for database expansion
- Static IP address for TCP/IP protocol

- For Web Server: Internet Explorer 4.x or 5.x, Netscape Enterprise Server 4.x or 5.x, and web server software, such as Microsoft Internet Information Server (IIS) or Personal Web Server.
- For integration with QADirector, QADirector 4.4 or later
- For integration with TrackRecord, TrackRecord 6.0

For Reconcile Clients:

- Mouse
- A minimum of 640 x 480 display
- Windows 95, Windows 98, Windows 2000 or Windows NT 4.0 or above
- Microsoft Internet Explorer 4.0 or above
- A minimum of 32M total system memory
- TCP/IP software

Installing the Reconcile Server and Web Server

This section assumes that a Compuware License Manager has previously been installed (unless you are installing an evaluation copy of Reconcile).

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.

For access to Reconcile's web publishing features, you must install the Web Server. The Web Server is installed through the server installation procedure.

Note that the Reconcile server must be updated with each product release.

To Install the Reconcile Server and Web Server Software

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.

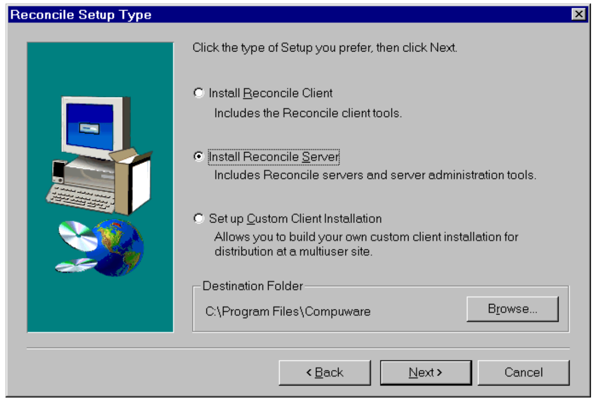


Figure 3-1 Setup Type Dialog

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.**

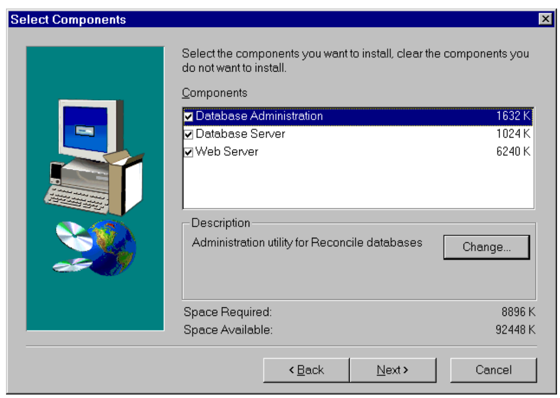


Figure 3-2 Select Components Dialog

To use Reconcile's web publishing features, you must install the Web Server. The Web Server can be installed on the same machine as the Reconcile server or on a different machine.

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

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**.

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.

10 **Create a database, as described in the next section.**

11 **Identify sources of information to be published to the web.**

Refer to“Identifying a New Data Source for the Web Server” on page 18.

12 **Install the Reconcile client.**

Refer to “Installing a Reconcile Client” on page 19.

Creating a New Database

Client installations include a sample 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.**

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

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

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

4 **Access only: Enter a name for the new database and click Next.**

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

5 **Access only: 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.

6 **SQL only: Select an MS SQL Server ODBC data source name (DSN).**

If an appropriate DSN has not been created, click the **DSN** button to access the ODBC Data Source Administrator. Create the DSN, then continue with Reconcile database creation. If Reconcile does not detect the ODBC Data Source Administrator on this machine, the **DSN** button is not displayed.

7 **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 `\\`*`machinename`*`\`*`sharename`*`\`*`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 **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 `\\`*`machinename`*`\`*`sharename`*`\`*`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.

9 **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.**

10 **Click Finish.**

The database is created.

Identifying a New Data Source for the Web Server

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 Server

1 **On the web server, 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 server.**

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 Server on multiple machines, you must set up DSNs and run this utility on each web server 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.**

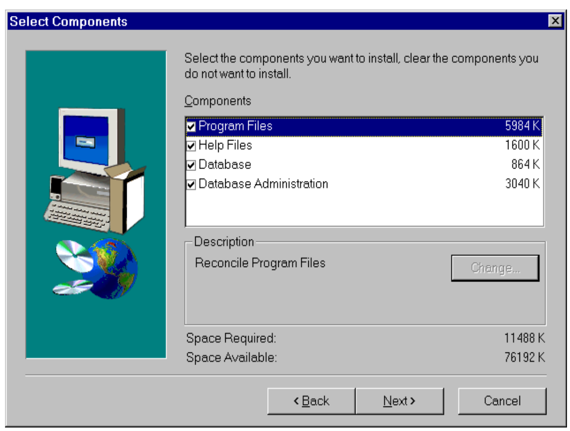


Figure 3-3 Select Components Dialog - Client Installation

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 Server and the Reconcile client.

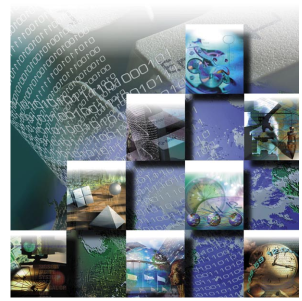
3 Click OK.

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.

Chapter 4

Starting the TrackRecord Server



This chapter describes how to run the TrackRecord server as a process or a service.

Running the TrackRecord Server

Windows NT provides two ways to run an application:

- As a process
- As a service

If the TrackRecord server is run as a process, it will operate under a user login account. When run, 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 logged in user account that started it exits.

If the TrackRecord server is run as a service, it will operate under a special system account. 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 computer is shut down.

The decision to run the TrackRecord server as a process or as a service 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, while very large groups might need the added performance provided by a dedicated machine.

When the server will run on a dedicated machine, run the TrackRecord server as a process to take advantage of its error message display. When the server will run on a non-dedicated machine, run the server as a service so that users can log on and off without disrupting the TrackRecord server.

Running the Server as a Process

Running the TrackRecord server as a process allows it to operate under a user login account.

To Start the Server Process Manually

1. **On Windows NT, click the `Start` menu, point to `Programs`, then to `Compuware|TrackRecord Server`, and select `Server Startup`.**

   Alternatively, double-click the icon for the file CTSRVR.EXE (using Windows NT Explorer, for example)

2. **For Novell Netware, enter load CTSRVR.NLM on the Netware server.**

To Shut Down the Server Process Manually

1. **On Windows NT, choose Shutdown from the server Control menu, and enter ADMIN as both the user name and password.**

   The password is case sensitive, so you must type it completely in uppercase.

2. **For a Netware machine, run CTSTOP.EXE from the Windows NT machine from which you installed the server and enter ADMIN as the password. 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 Windows NT service allows the server to run while users log on and off the Windows NT Server or Workstation.

To Run the Server as a Windows NT Service

1. **Make sure 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 **From the Windows NT Control Panel, double-click the Services icon.**

5 **Select Faircom Server, and click Start. To stop the server, select Faircom Server and click Stop.**

The server defaults to manual start-up. This means that each time the server machine is rebooted, you have to start the server manually.

You can also have the server run automatically when Windows NT starts by double-clicking the `Faircom Server` line and changing the type from MANUAL to AUTOMATIC.

To Remove the Server as a Windows NT Service

1 **Open the Services Control Panel dialog, select Faircom Server, and click Stop.**

From a DOS command prompt, go to the TrackRecord server directory and type:

```
instsrv remove
```

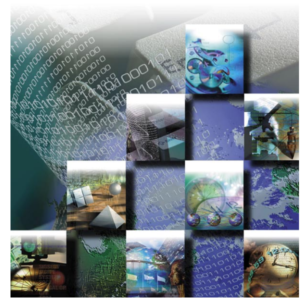
You will see the message ‘Service deleted.’

Networks Behind a Firewall

TrackRecord supports the TCP/IP protocol on Windows NT. 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.

Chapter 5

Configuring TrackRecord AutoAlert



This chapter describes TrackRecord AutoAlert system requirements, installation options, and how to set up a mailbox and mail profile for AutoAlert.

AutoAlert System Requirements

TrackRecord AutoAlert provides support for SMTP and MAPI mail servers and requires:

For SMTP

- An SMTP-compliant mail system
- A Windows NT server running the Microsoft Exchange Server
- Windows 2000 with the SMTP sub-component of IIS 5 installed. (Normally, no configuration of the SMTP server is needed.)
- Windows NT 4 Server with the SMTP sub-component of IIS 4 from the Option Pack 4 installed.

For MAPI

- A MAPI-compliant mail system on the server to allow AutoAlert to send messages. Note that, to facilitate configuration and testing of the mail profile, Microsoft Outlook is recommended on the server machine.
- CDO.DLL. Note the following:
  - If you are using Microsoft Office 97, you must update your original version of CDO.DLL.
  - CDO.DLL is not enabled by default with Microsoft Outlook 2000. You can rerun the installation and enable the

Collaborative Data Objects library, or download it from the following link.

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.

For Client Machines

- A mail system on the user's system to allow users to receive messages (MAPI-compliance optional).

Installation Options

AutoAlert installation is described in Chapter 2.

To install AutoAlert on a different computer, run the Setup program on that computer and install just the AutoAlert component.

To allow remote administration, run the Setup program on that computer and use the TrackRecord Client installation to install only the Administration utility without installing the server.

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. **Make sure you have one of the platforms described above set up.**
2. **Start the AutoAlertService.**
3. **Run AutoAlert.**
4. **Go into Options and check Use SMTP.**
5. **In the address field, enter the e-mail address from which AutoAlert e-mails will come (for example, TRAA@mycompany.com).**
6. **Add the database.**

Using Microsoft Outlook (MAPI)

After the AutoAlert software is installed, as described in Chapter 2, you must create a mailbox and mail profile for AutoAlert's use.

To Set up 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.**

   You should set up a mailbox for AutoAlert's exclusive use. AutoAlert e-mail notices are sent from this mailbox.
3. **From Start/Settings/Control Panel select 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:

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

   b. Check the appropriate **Information Service**, typically Microsoft Exchange Server.

   c. For the **Profile** name, enter the name AutoAlert.

   d. Enter the name of your **Exchange server** and a **mailbox** name.

   e. Accept the defaults for the remaining Wizard prompts and click **Ok**.
5. **Run 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. **From the** `Start|Settings|Control Panel Services` **option, select AutoAlert Service and click the Startup button.**

   a. In the Startup Type box, check **Automatic**. This step is optional but recommended.

   b. In the **Log On As** box, check the **This Account** option and enter information for the account you logged in to in Step 1.

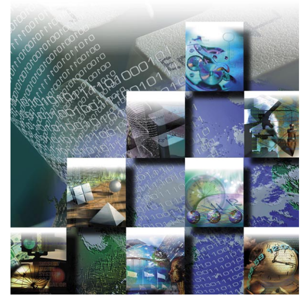
   c. Click **Ok** to close the Startup dialog.

   d. With the AutoAlert Service selected, click the **Start** button.

   The AutoAlert Service may take up to a minute to start when it is first started.

To set up databases to be monitored, and to learn about all AutoAlert administration tasks, refer to the *Using TrackRecord* manual (`Using TrackRecord.pdf`).

Chapter 6
Configuring TrackRecord WebServer



This chapter describes TrackRecord WebServer system requirements, creation of a virtual directory for use by the TrackRecord WebServer, and server and client set up requirements.

Reconcile?

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 *Using TrackRecord* manual (`Using TrackRecord.pdf` in the TrackRecord installation directory).

WebServer System Requirements

TrackRecord WebServer requires one of the following servers:

- Microsoft Internet Information Server (IIS) 2.0 or above (3.0 with ASP or later recommended)
- Microsoft Peer Web Services
- Netscape Enterprise Server 2.0 or above
- O'Reilly Website or Website Professional

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. If this directory does not exist when WebServer is installed, the installation procedure will create a `cgi-win` folder on the hard drive. You would then set up the virtual directory to point to this directory.

(WebServer installation is described in “Installing the TrackRecord Server, AutoAlert, and WebServer” on page 4.)

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 web server documentation for information about creating a virtual directory.

To Create a Virtual Directory on Microsoft IIS v3.0

1 **Start the Internet Service Manager.**

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 (C:\InetPub\cgi-win by default).**

Make sure the Read checkbox is unchecked, and the Execute (including script) radio 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.**

Make sure 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 **Make sure 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` **and select** `Manage|Services` **and** `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 to set up 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. However, if you require that the WebServer be accessible without a logged-on user, in Step 4 (below), 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.

To set the user account from which WebServer will be run, after WebServer is installed do the following.

1 **From the Start menu, click Run and type in "DCOMCNFG."**
2 **From the Applications tab, select** `TRWebDB.TRWebDBHost`.
3 **Click Properties.**
4 **Go to the Identity tab and be sure the user account to log into the database is set to "The interactive user."**

   Also be sure that a user with Administrator privileges to the database is logged into NT while the WebServer is running, since Administrator privilege will allow the WebServer to work where the Launching User's permissions will not.
5 **Repeat Steps 2 through 4 for** `TRWebSessionsHost.UserInfo`.

If running in interactive mode, ensure that World Wide Web Publishing Service is set to interact with the desktop. This can be verified by going to the **Start** menu, then **Settings**, **Control Panel**, **Services**, **World Wide Web Publishing Service**, **Properties**, **Log On As: Allow Service to Interact with Desktop**.

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.

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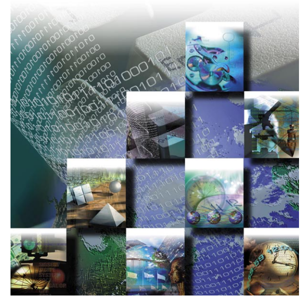

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