# *TrackRecord® 6.1 and Reconcile™ 1.0 Installation Guide*

# Software License Agreement

This Software License Agreement is not applicable if Licensee has a valid Compuware License Agreement and has licensed this Software under a Compuware Product Schedule.

Please Read This License Carefully

You, either an individual or entity ("Licensee"), are purchasing a license ("Agreement") to use this Compuware Corporation software ("Software") and related user manuals ("Documentation"). The Software is the property of Compuware Corporation ("Compuware") and/or its licensors, is protected by intellectual property laws, and is provided to Licensee only under the license terms set forth below. This Agreement does not transfer title to the intellectual property contained in the Software. Compuware reserves all rights not expressly granted herein. Opening the package and/or using the Software indicates your acceptance of these terms. If you do not agree to all of the terms and conditions, or if after using the Software you are dissatisfied, you may return the Software, Documentation and any copies within thirty (30) days of purchase to the party from whom you received it for a refund, subject in certain cases to a restocking fee.

**Title and Proprietary Rights**: Licensee acknowledges and agrees that the Software is proprietary to Compuware and/or its licensors, and is protected under the laws of the United States and other countries. Licensee further acknowledges and agrees that all rights, title and interest in and to the Software, including intellectual property rights, are and shall remain with Compuware and/or its licensors. Unauthorized reproduction or distribution is subject to civil and criminal penalties.

**Use Of The Software**: Compuware grants Licensee the limited right to use the Software and Documentation included in the package with this license, subject to the terms and conditions of this Agreement. Licensee agrees that the Software will be used solely for internal purposes. Only one copy of the Software may be installed on a single computer at any one time unless:

(i)   The Software is designed and intended by Compuware for use in a shared network client server environment, as set forth in the Documentation; and

(ii)  Licensee agrees to provide technical or procedural methods to prevent use of the Software, even at different times, by anyone other than Licensee; and

(iii) Licensee has purchased a license for each individual user of the Software and/or for each computer that will have access to the Software. Any unauthorized use of this Software may cause termination of this Agreement.

Licensee may make one machine-readable copy of the Software for BACK UP PURPOSES ONLY. This copy shall display all proprietary notices, be labeled externally to show that it is the property of Compuware, and that its use is subject to this Agreement. Documentation may not be copied in whole or part. Licensee agrees to provide technical or procedural methods to prevent use of the Software by anyone other than Licensee, even at different times.

Licensee may not use, transfer, assign, export or in any way permit the Software to be used outside the country of purchase, unless authorized in writing by Compuware. Except as expressly provided in this Agreement, Licensee may not modify, reverse engineer, decompile, disassemble, distribute, sub-license, sell, rent, lease, give or in any way transfer the Software, by any means or in any medium, including telecommunications. Licensee will use its best efforts and take all reasonable steps to protect the Software from unauthorized use, copying or dissemination, and will retain all proprietary notices intact.

**Redistribution Rights of Device Driver Development Software**: This section shall only apply if the Software is device driver development software, used by Licensee to develop application or device driver programs ("User Software"), as specified in the Documentation. The User Software may include run-time components ("RTCs") that have been extracted by the Software from the library files of the Software, programs to remotely test the User Software, and compiled code examples. These RTCs, examples, and programs are specifically designated as redistributable in the Documentation. Licensee has a non-exclusive, royalty-free, restricted license to:

(i)   modify, compile, and distribute the driver code examples;

(ii)  distribute the remote testing program for testing purposes only;

(iii) embed the RTCs and driver code examples in its User Software, in object code form only; and

(iv)  reproduce and distribute the RTCs and driver code examples embedded in its User Software, in object code form only, provided that:

   (a)   Licensee distributes the RTCs and driver code examples only in conjunction with and as a part of its User Software;

   (b)   Licensee will be solely responsible to anyone receiving its User Software for any updates, technical and other support obligations, and any other liability which may arise from the distribution of its User Software;

(c) Licensee does not use Compuware's or its licensors' names, logos, or trademarks to market or distribute its User Software;

(d) Licensee includes Compuware's and its licensors' copyright and/or proprietary notices and legends within the executable images of its User Software and on Licensee's software media and documentation; and

(e) Licensee agrees to indemnify, hold harmless and defend Compuware and its licensors from and against any claims or lawsuits, including attorney's fees, that arise or result from the use or distribution of its User Software.

**Government Users**: With respect to any acquisition of the Software by or for any unit or agency of the United States Government, the Software shall be classified as "commercial computer software," as that term is defined in the applicable provisions of the Federal Acquisition Regulation (the "FAR") and supplements thereto, including the Department of Defense (DoD) FAR Supplement (the "DFARS"). If the Software is supplied for use by DoD, the Software is delivered subject to the terms of this Agreement and either (i) in accordance with DFARS 227.7202-1(a) and 227.7202-3(a), or (ii) with restricted rights in accordance with DFARS 252.227-7013(c)(1)(ii) (OCT 1988), as applicable. If the Software is supplied for use by a Federal agency other than DoD, the Software is restricted computer software delivered subject to the terms of this Agreement and (i) FAR 12.212(a); (ii) FAR 52.227-19; or (iii) FAR 52.227-14(ALT III), as applicable. Licensor: Compuware Corporation, 31440 Northwestern Highway, Farmington Hills, Michigan 48334.

**Limited Warranty and Remedy**: Compuware warrants the Software media to be free of defects in workmanship for a period of ninety (90) days from purchase. During this period, Compuware will replace at no cost any such media returned to Compuware, postage prepaid. This service is Compuware's sole liability under this warranty. COMPUWARE DISCLAIMS ALL EXPRESS AND IMPLIED WARRANTIES, INCLUDING THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. SOME STATES DO NOT ALLOW THE EXCLUSION OF IMPLIED WARRANTIES, SO THE ABOVE EXCLUSION MAY NOT APPLY TO LICENSEE. IN THAT EVENT, ANY IMPLIED WARRANTIES ARE LIMITED IN DURATION TO THIRTY (30) DAYS FROM THE DELIVERY OF THE SOFTWARE. LICENSEE MAY HAVE OTHER RIGHTS, WHICH VARY FROM STATE TO STATE.

**Infringement of Intellectual Property Rights**: In the event of an intellectual property right claim, Compuware agrees to indemnify and hold Licensee harmless, provided Licensee gives Compuware prompt written notice of such claim, permits Compuware to defend or settle the claim, and provides all reasonable assistance to Compuware in defending or settling the claim. In the defense or settlement of such claim, Compuware may obtain for Licensee the right to continue using the Software or replace or modify the Software so that it avoids such claim, or if such remedies are not reasonably available, accept the return of the infringing Software and provide Licensee with a pro-rata refund of the license fees paid for such Software based on a three (3) year use period.

**Limitation of Liability**: LICENSEE ASSUMES THE ENTIRE RISK AS TO THE RESULTS AND PERFORMANCE OF THE SOFTWARE. IN NO EVENT WILL COMPUWARE BE LIABLE TO LICENSEE OR TO ANY THIRD PARTY FOR ANY SPECIAL, INDIRECT, INCIDENTAL, OR CONSEQUENTIAL DAMAGES, INCLUDING BUT NOT LIMITED TO, LOSS OF USE, DATA, REVENUES OR PROFITS, ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT OR THE USE, OPERATION OR PERFORMANCE OF THE SOFTWARE, WHETHER SUCH LIABILITY ARISES FROM ANY CLAIM BASED UPON CONTRACT, WARRANTY, TORT (INCLUDING NEGLIGENCE), PRODUCT LIABILITY OR OTHERWISE, AND WHETHER OR NOT COMPUWARE OR ITS LICENSORS HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE. SOME STATES DO NOT ALLOW THE LIMITATION OR EXCLUSION OF LIABILITY FOR INCIDENTAL OR CONSEQUENTIAL DAMAGES, SO THE ABOVE LIMITATION OR EXCLUSION MAY NOT APPLY TO LICENSEE. IN NO EVENT SHALL COMPUWARE BE LIABLE TO LICENSEE FOR AMOUNTS IN EXCESS OF PURCHASE PRICE PAID FOR THE SOFTWARE.

**Term and Termination**: This License Agreement shall be effective upon Licensee's acceptance of this Agreement and shall continue until terminated by mutual consent, or by election of either Licensee or Compuware in case of the other's unremediated material breach. In case of any termination of this Agreement, Licensee will immediately return to Compuware the Software that Licensee has obtained under this Agreement and will certify in writing that all copies of the Software have been returned or erased from the memory of its computer or made non-readable.

**General**: This Agreement is the complete and exclusive statement of the parties' agreement. Should any provision of this Agreement be held to be invalid by any court of competent jurisdiction, that provision will be enforced to the maximum extent permissible and the remainder of the Agreement shall nonetheless remain in full force and effect. This Agreement shall be governed by the laws of the State of Michigan and the United States of America.
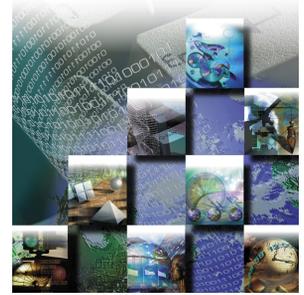
# Table of Contents

## 1  Introduction

## 2  TrackRecord Installation

## 3  Reconcile Installation

**4   Index**

# Chapter 1
# Introduction
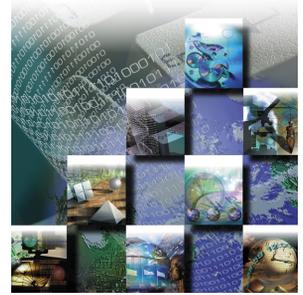
The *TrackRecord/Reconcile Installation Guide* provides information and procedures to install and configure TrackRecord and Reconcile. It includes the following chapters:

◆ **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* — system requirements and instructions for installing TrackRecord and Reconcile.

◆ *License Installation Guide*— instructions for licensing your product.

## Viewing and Printing Online Books

TrackRecord and Reconcile'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 products 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), and build number of the Compuware product. This information is on the covers of the product documentation and is displayed when you select the About command from your product's Help menu.

◆ 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**

Compuware Corporation

31440 Northwestern Highway

Farmington Hills, MI 48334-2564

1-800-538-7822

# Chapter 2
# TrackRecord Installation
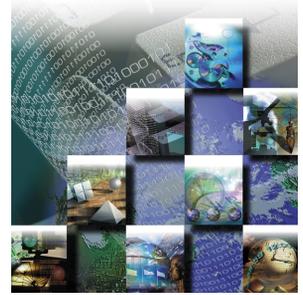


TrackRecord records and reports information about products being developed or supported. Information on Team Members, testers, schedules, and defect reports is recorded in the database; it can be retrieved using TrackRecord's query and reporting features. This chapter describes how to install TrackRecord 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 the TrackRecord server, 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

◆ Pentium II PC running either:
  ◇ Microsoft Windows 2000 Server
  ◇ Windows 2000 Professional
  ◇ Windows NT Server
  ◇ Workstation 4.0 or later with TCP/IP network protocol software
◆ 128MB total system memory
◆ 50MB of free disk space, plus room for database expansion
◆ Static IP address for systems using TCP/IP protocol

## For AutoAlert

◆ A mail system that is either:
  ◇ SMTP-compliant
  ◇ MAPI-compliant mail system on the server to allow AutoAlert to send messages

---

Note    Microsoft Outlook is recommended on the server to facilitate configuration and testing of the mail profile.

---

◆ Static IP address for the server component to communicate with the Admin component

## 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) 4.0 or later with ASP
◆ Microsoft Personal Web Server
◆ Netscape Enterprise Server 4.1

## For TrackRecord Clients

◆ 300 MHz Pentium II PC with 128 MB of RAM

- Microsoft Windows 95B or above, Windows 98 SE, Windows 2000, or Windows NT 4.0 Workstation/Server with Service Pack 5 or Service Pack 6a
- Microsoft Internet Explorer 4.0 or later to support HTML Help
- WebServer access requires Internet Explorer 4.0 or Netscape Navigator 4.5 or later
- TCP/IP client software
- 640 x 480 display (minimum)

## 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    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 12.

- **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 15.

## Installing the TrackRecord Server, AutoAlert, and WebServer

Note    If you are running a previous version of TrackRecord, Compuware strongly recommends that you uninstall the previous version and reboot your PC before proceeding with this installation. See "Uninstalling TrackRecord" on page 32.

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 because TrackRecord requires newer versions of some standard Microsoft support files. Your system will automatically reboot before proceeding.

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 (Figure 2-1):**
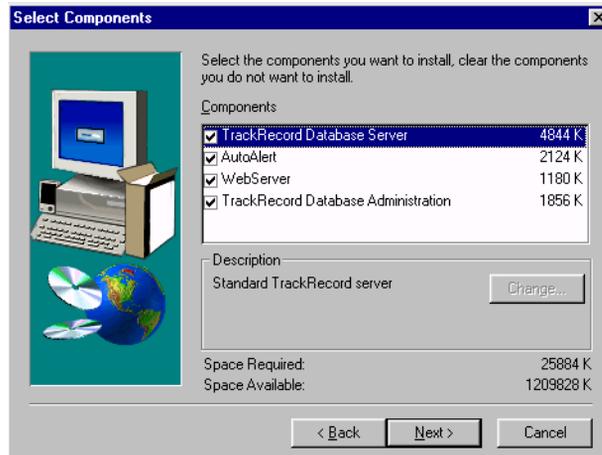


Figure 2-1 Select Components Dialog Box

◇ **TrackRecord Database Server**: All sites require at least one database server.

---

**Caution: Compuware that you not set up a personal email account on the machine where AutoAlert is installed. AutoAlert will delete any incoming email that is not recognized as valid TrackRecord information.**

---

◇ **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**.

---

Note    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 26 for additional information.

---

◇ **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 20 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 12.

---

Click **Next**.

**10  On the Server Configuration Dialog Box (Figure 2-2):**
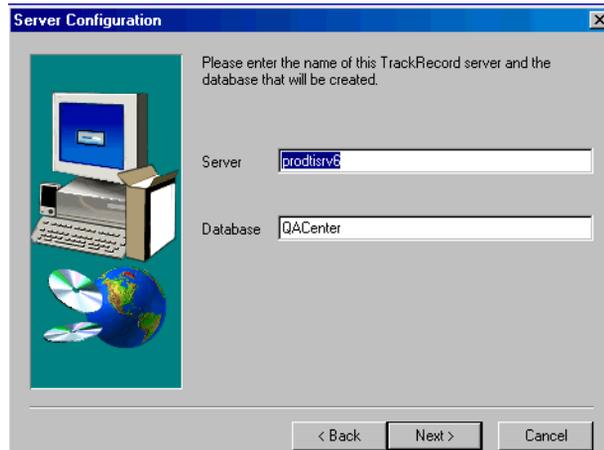
Figure 2-2 Server Configuration Dialog Box

◇ Enter the name of this PC. Generally, the machine name is sufficient, but in some network configurations the fully qualified DNS name might be required.

To determine the PC name on a Windows NT machine, select **Settings>Control Panel>Network.** The computer name will appear on the **Identification** properties option. For Windows 2000 systems, use the **Settings>Control Panel>System** properties option.

◇ 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 4.x or 5.x 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**.

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

A status bar shows the progress of the installation.

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

# Installing a TrackRecord Client

> **Note** If you are running a previous version of TrackRecord, Compuware strongly recommends that you uninstall the previous version and reboot your PC before proceeding with this installation. See "Uninstalling TrackRecord" on page 32.

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.

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 (Figure 2-3), select Install TrackRecord client and select a location for the installation.**

Figure 2-3 Setup Type Dialog Box

◇ 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 (Figure 2-4):**



Figure 2-4 Select Component Dialog Box

◇ **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 (Figure 2-5):**
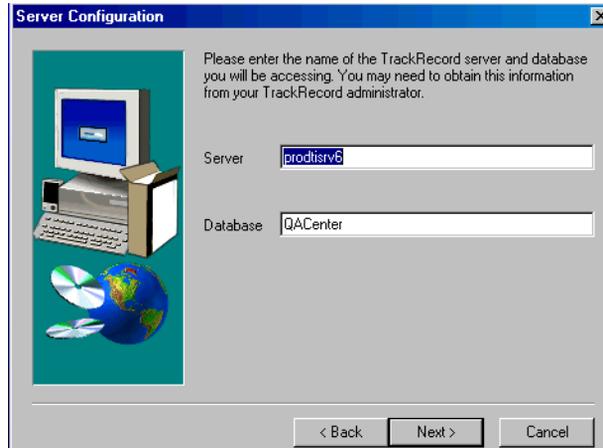
Figure 2-5 Server Configuration Dialog Box

◇ Enter the DNS name of the machine that the TrackRecord server is installed on. Your administrator can supply this name. It must be the same database name as used in the TrackRecord server installation.

◇ 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**.

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

A status bar shows the progress of the installation.

---

Note    If prompted, restart your PC (strongly recommended).

---

**11 When setup is complete, you may choose whether to view the Release Notes 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.

---

Note    If you are running a previous version of TrackRecord, Compuware strongly recommends that you uninstall the previous version and reboot your PC before proceeding with this installation. See "Uninstalling TrackRecord" on page 32.

---

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 Dialog Box.**

7  **On the same Dialog Box, select a location for the TrackRecord installation.**

---

Note    It is recommended that the path you choose be 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 when 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   **On the Server Configuration Dialog Box (Figure 2-5):**
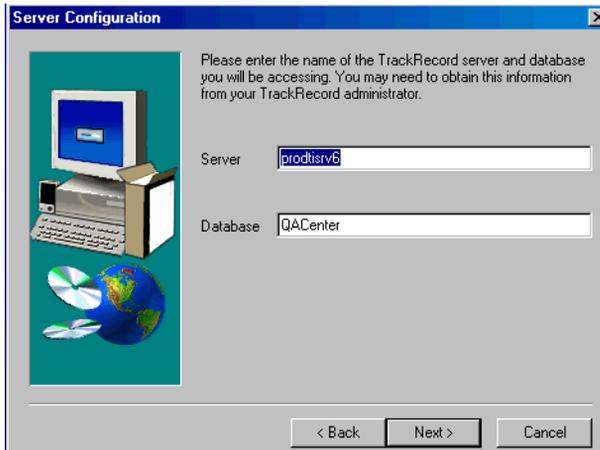
Figure 2-6 Server Configuration Dialog Box

◇ Enter the DNS name of the machine that the TrackRecord
   server is installed on. Your administrator can supply this name.
   It must be the same database name as used in the TrackRecord
   server installation.

◇ 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**.

**13 Choose any installation dialogs that you want displayed during
the client's installation (Figure 2-7).**
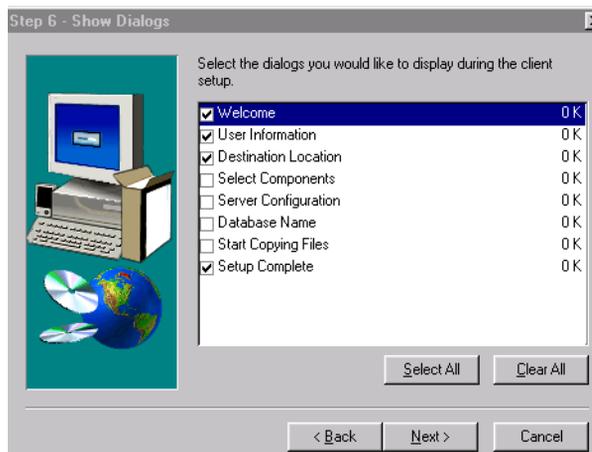


Figure 2-7 Step 6 of Custom Client Installation

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.**

14 **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.

15 **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 18.

◆ **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 19.

# 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 Shutdown the Server Process Manually

From the **Start** menu, choose **Programs>Compuware>TrackRecord Server>Server Startup**.

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

*Tip You can also have the server run manually when your system 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.*

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.

## Stopping 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**.

*Tip 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.*
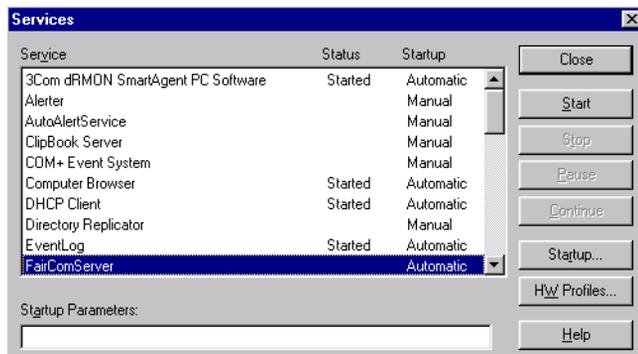


Figure 2-8 Windows NT Services Dialog Box

◇   **Windows 2000**: From the **Start** menu, select **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.

### Starting 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 19.

## 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. The virtual
directory is a name that is used in an address, which corresponds to a
physical directory on the server. 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 4.0, Microsoft IIS 5.0, Netscape Enterprise Server 3.5.1, and Personal Web Server. For other servers and versions, refer to your web server documentation for information about creating a virtual directory.

## Creating a Virtual Directory With Microsoft IIS 4.0

Perform the following procedure to create a virtual directory on an Windows NT Server with IIS 4.0:

1  **From the Start menu, select Programs>Windows NT 4.0 Option Pack>Microsoft Internet Information Server>Internet Service Manager.**
2  **Ensure that the Web site to which you want to add a directory is running and selected.**
3  **Click the Action button, and then point to New>Virtual Directory.**
4  **The New Virtual Directory Wizard appears. Click Next.**
5  **Enter *cgi-win* as the alias used to access the virtual directory. Click Next.**
6  **Map the physical path to the directory where TrackRecord's WebServer is installed (C:\InetPub\cgi -win by default) and click Next.**
7  **Ensure that only the options *Read* and *Run scripts* are selected. Click Next.**
8  **Click Finish to close the Wizard.**

## Creating a Virtual Directory With Microsoft IIS 5.0

Perform the following procedure to create a virtual directory on an Windows 2000 machine with IIS 5.0:

1  **Right-click on My Computer and select Manage.**
2  **Select Services and Applications>Internet Information Services.**
3  **Right-click on your Web site and select the New>Virtual Directory option.**
4  **Click Next to start the New Virtual Directory wizard. In the Wizard, complete the following steps:**

◇ Enter *cgi-win* as the alias used to access the virtual directory. Click **Next**.

◇ Map the physical path to the directory where TrackRecord's WebServer is installed (C:\InetPub\cgi -win by default) and click **Next**.

◇ Ensure that only the options *Read* and *Run scripts* are selected. Click **Next**.

◇ Click **Finish** to close the Wizard.

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

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

7 **Verify that the Execute Permissions are set to *Scripts and Executables*.**

## Creating a Virtual Directory With Netscape Enterprise Server

Perform the following procedure after running setup in order to run TrackRecord WebServer on a Netscape Enterprise Server 4.1.

1 **From the Start menu, select Programs>iPlanet Web Server>Administer Web Server.**

2 **Click on Manage Servers in the left pane to display a list of current servers.**

Select the appropriate server from the drop down list and click the **Manage** button.

3 **After ensuring that the WebServer is on, select the Programs tab and click the WinCGI Directory link.**

4 **On the WinCGI Directory setup page (Figure 2-9),**
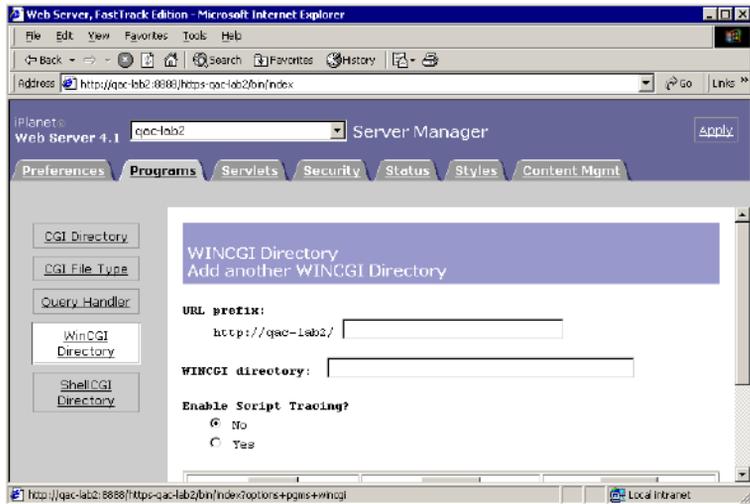
Figure 2-9 WinCGI Directory

◇ Enter **cgi-win** in the URL prefix field.

◇ Enter the full path of the WinCGI directory, which was installed with the TrackRecord server in the WinCGI directory field. By default, the path is *x*:\netscape\server4\cgi-win.

◇ Set enable script tracing to **No**.

◇ Click the **OK** button.

You should receive a message indicating that the directory has been successfully added.

**5 Access the CGI application from a web browser by typing in the url: http://<dns name>cgi-win/itemview.exe.**

## Creating a Virtual Directory With Personal Web Server

To prepare the web server for Windows NT workstations with Personal Web Server, follow these steps:

**1 Navigate to Start>Programs>Windows [NT or 2000] 4.0 Option Pack>Microsoft Personal Web Server>Personal Web Manager.**

**2 Click the Advanced icon on the left side of your screen.**

**3 Click Add.**

The Add Directory dialog box (Figure 2-10) appears.
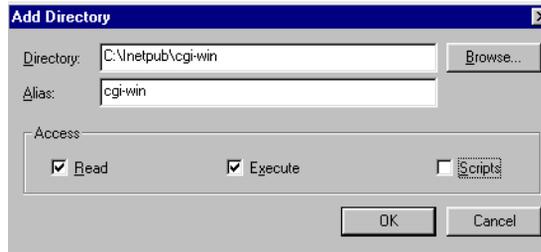
Figure 2-10 Add Directory Dialog Box

    a    In the Alias field, type **cgi-win**.

    b    Click **Browse** to map the physical path to the directory where TrackRecord's WebServer is installed (C:\InetPub\cgi -win by default).

    c    Select **Read** and **Execute** for the access level. Click **OK**.

**4**    **Exit the Personal Web Manager.**

# Running in Interactive Mode

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

The differences between the settings are as follows:

| Account Setting | Description | Note/Caution |
|---|---|---|
| Interactive user (recommended) | 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 Web-Server will not start if a user is not logged on. |

| Account Setting | Description | Note/Caution |
|---|---|---|
| Launching user | Specifies that the WebServer will run using the security setting of the user who started the Web-Server (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. | Windows NT server's authentication service does not allow an identity that is passed from one computer over the network to be used to access network resources. |

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

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

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

**2    The Distributed COM Configuration Properties Dialog Box appears (Figure 2-11).**

**3    From the Applications tab, select *TRWebDB.TRWebDBHost* and click Properties.**
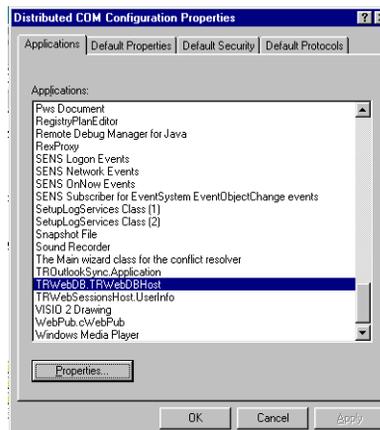


Figure 2-11 Distributed COM Configuration Properties

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

---

Note    If you require that the WebServer be accessible without a logged-on user, set the user account to *launching user*. However, this is not a supported setting.

---

5   **Click Apply. Click OK.**

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

7   **Click OK to exit the dialog.**

8   **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.

---

**Caution: Compuware recommends that you not set up a personal email account on the machine where AutoAlert is installed. AutoAlert will delete any incoming email that is not recognized as valid TrackRecord information.**

---

## Using SMTP Mail Services

TrackRecord AutoAlert users can choose to use SMTP as their underlying mail service. 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    On a machine on which the AutoAlert Administrator has been installed, select AutoAlert from the Start\Programs\Compuware\TrackRecord menu.**

The TrackRecord AutoAlert- Servers dialog appears.

**2    Click View Server 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    Select the Email Package tab.**

For more information on this tab, see the *TrackRecord User's Guide*.

**5    Place a checkmark next to the Use SMTP option to enable the AutoAlert server to use SMTP (Figure 2-12).**

Figure 2-12 SMTP Option

**6** **Enter the name of the SMTP server and the address of the user sending the email (e.g. xxxx@mycompany.com).**

**7** **Click Apply and OK when your settings are complete.**

## 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** **From the Start menu, select Settings>Control Panel. Double-click on the Mail option.**
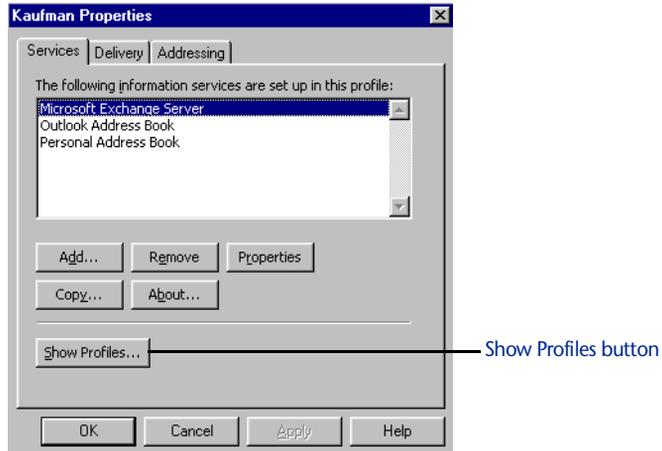
Figure 2-13 Mail Properties Dialog Box

**4   On the Services tab, click the Show Profiles button (Figure 2-13).**

◇  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 Setup Wizard.

   ii  Check the appropriate Information Service, typically Microsoft Exchange Server (Figure 2-14). Click **Next**.



Figure 2-14 Setup Wizard

   iii  For the Profile name, enter the name **AutoAlert** (Figure 2-15). Click **Next**.

Figure 2-15 Entering a Profile Name

    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** from the **Start** menu. Select the **Services** option. From the list of available services, select **TrackRecord AutoAlert Server** and click the **Startup** button.

        i  In the Startup Type box (Figure 2-16), select **Automatic**. This step is optional, but recommended.

**Figure 2-16** Services Dialog Box

    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 28.

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

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

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

◇ **Windows 2000**: Choose **Settings>Control Panel** from the **Start** menu.

    i   Double-click the **Administrative Tools** icon.

    ii   Select **Services** and then double-click on the **TrackRecord AutoAlert Service**.

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

    iv  Click the **Log On** tab (Figure 2-17) and check the **This Account** option and enter information for the account you logged into in Step 1 on page 28.
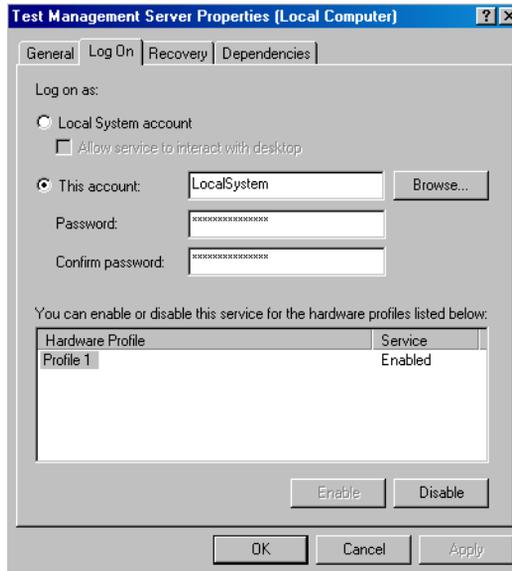
Figure 2-17 Logon Tab.

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

    vi    Double-click the **TrackRecord AutoAlert Service**. Click the **Start** button. Click **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, consult the AutoAlert online help for more information. You can reach the AutoAlert help by selecting **Start>Programs>Compuware>TrackRecord>AutoAlert Help**.

## Uninstalling TrackRecord

You can uninstall the TrackRecord server, the client, and the Compuware License Manager.

Note    Although uninstalling TrackRecord will *not* delete your TrackRecord database, it is recommended that you backup your database before uninstalling. An easy way to do this is to copy the database and save it in a different location on your computer.

## To Uninstall TrackRecord

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

**2** **Select the component to uninstall:**

---

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

---

◇ Select **Compuware TrackRecord** to delete the client

◇ Select **Compuware TrackRecord Server** to delete the server

◇ Select **Compuware License Manager** to delete the License Manager

**3** **Click the Add/Remove button.**

The Confirm File Delete Dialog Box appears. Click **Yes** to confirm the deletion and click **OK** when the uninstall is successfully completed. Click **OK** to exit the Add/Remove Programs Dialog Box.

**4** **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.

## 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

Reconcile Client(s):

- Mouse
- A minimum of 640 x 480 display
- Microsoft Windows 95B or above, Windows 98 SE, Windows 2000, or Windows NT 4.0 Workstation/Server with Service Pack 5 or Service Pack 6a
- 300MHz Pentium II PC with 128 MB of RAM
- Microsoft Word 97 or higher
- Microsoft Internet Explorer 4.0 or above
- 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.
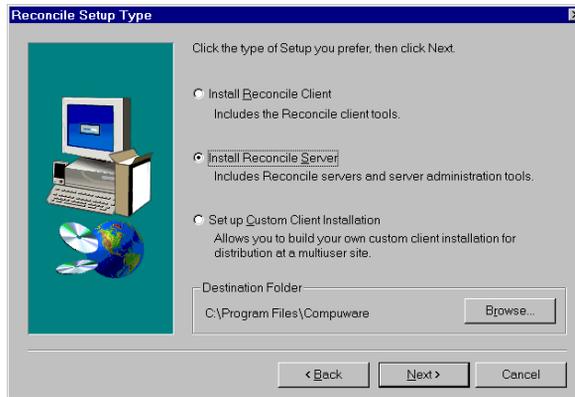


Figure 3-18 Setup Type Dialog

**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.**
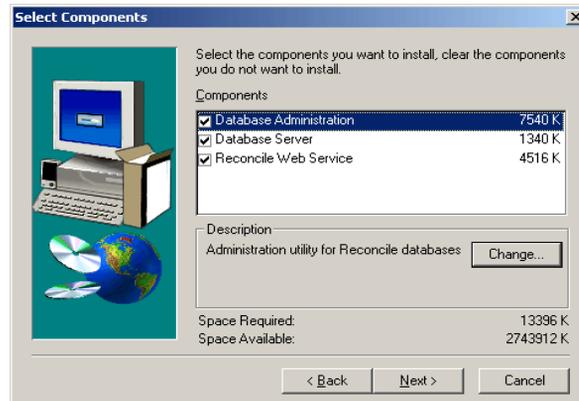


Figure 3-19 Select Components Dialog

Click **Change** to view the specific components of each of the main components. The following is a description of each of the main components, followed by a list of their specific components:

◆ **Database Administration —** An administration utility for Reconcile databases

　◇ Maintenance Utility

　◇ Help Files

◆ **Database Server —** The Reconcile Database Server

◇ Database

◇ Sample Project

---

Note    You must make sure that the Sample Project specific component is selected if you want the sample project, a project that helps users become more familiar with Reconcile, to be available on client machines.

---

◆ **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 , complete your Reconcile Server installation, and then follow these steps:

1 Create a database with a default Web Service directory of \\**Reconcile\Web**
2 Create a new \\**Reconcile\Web\Templates directory**
3 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 *\\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.

**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 *\\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 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.**



Figure 3-20 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 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.**

# Index