Rational® TestManager

Version 7.0.0
Windows

IBM

Installation Guide

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Before using this information, be sure to read the general information under "Notices," on page 27.

Contents

Tables

About this book

This guide provides instructions for installing IBM® Rational® TestManager.

Who should read this book

This guide is intended for those who are responsible for installing Rational TestManager. The guide includes information for both end users of the products and administrators.

Contacting IBM Customer Support for IBM Rational software products

If you have questions about installing, using, or maintaining this product, contact IBM Customer Support as follows:

The IBM software support Internet site provides you with self-help resources and electronic problem submission. The IBM Software Support Home page for IBM Rational products can be found at http://www.ibm.com/software/rational/support/.

Voice Support is available to all current contract holders by dialing a telephone number in your country (where available). For specific country phone numbers, go to http://www.ibm.com/planetwide/.

Note: When you contact IBM Customer Support, please be prepared to supply the following information:

- Your name, company name, ICN number, telephone number, and e-mail address
- Your operating system, version number, and any service packs or patches you have applied
- Product name and release number
- Your PMR number (if you are following up on a previously reported problem)

Downloading the IBM Support Assistant

The IBM Support Assistant (ISA) is a locally installed serviceability workbench that makes it easier to resolve software product problems. ISA is a free, stand-alone application that you download from IBM and install on any number of machines. It runs on AIX®, RedHat Enterprise Linux® AS, HP-UX, Solaris, and Windows® platforms.

ISA includes these features:
- Federated search
- Data collection
- Problem submission
- Education roadmaps

For more information about ISA, including instructions for downloading and installing ISA and product plug-ins, go to the ISA Software Support page.

IBM Support Assistant: http://www.ibm.com/software/support/isa/

Chapter 1. Preliminary installation information

This chapter will help orient you to the installation process. Read this information before you install IBM Rational TestManager.

For the most current information related to Rational TestManager installation procedures, product features, and known issues, see the *IBM Rational TestManager Release Notes* at the IBM Publications Center (www.ibm.com/shop/publications/order).

You can also access the release notes after the installation is complete, both from the LaunchPad and from within the product (click **Start** > **Programs** > **IBM Rational** > **IBM Rational TestManager** > **Readme**).

System and software requirements

For a list of compatible operating systems and the disk space requirements for product installation and for the cache files that the products create, see the *IBM Rational TestManager Release Notes*.

In addition to the system and software requirements listed in the release notes, you must also have Adobe Acrobat Reader 4.x or higher installed on your computer so that you can read online PDF files. Download a free copy of Adobe Acrobat Reader from www.adobe.com.

Installation instructions

If you are an end user of Rational TestManager, go to Chapter 2, "Installation instructions for end users," on page 3.

If you are an administrator who is setting up Rational TestManager for end users to install, go to Chapter 3, "Installation instructions for administrators," on page 15.

Chapter 2. Installation instructions for end users

This chapter describes how to install and license IBM Rational TestManager. It also includes instructions for using Rational TestManager with IBM DB2, for modifying an installation, and for uninstalling IBM Rational products.

Preinstallation tasks

Before you start the installation, perform the following tasks:

- Verify that your system meets the minimum requirements and is running on a compatible operating system. See "System and software requirements" on page 1.
- Make a backup copy of your registry and system directories.
- If you have IBM Rational products on your system from a previous release, this installation process uninstalls them. Back up any local files and data related to those versions.
- Stop all applications. If you have virus protection software, it is advisable to turn it off. These programs often run in the background and interfere with the performance of the installation process because the virus protection checks each file that is installed.
- Keep the following information about the installation process in mind as you proceed through the installation instructions:
  - The IBM Rational Setup wizard, which performs the installation, uses C:\Program Files\Rational as the default installation directory.
  - The Setup wizard requires that you install all IBM Rational products in the same directory. If you already have IBM Rational products installed on the computer, the Setup wizard installs additional IBM Rational products in the same directory.
  - If you have installed earlier versions of Rational TestManager as part of the Rational Suite®, read Chapter 4, "Upgrading from an IBM Rational Suite installation," on page 25.
  - The Setup wizard installs Microsoft® Core Components and some additional files on the same drive as the operating system (often the C drive), even if you have specified an alternate drive for the installation. These files can require between 5 and 15 MB of temporary disk space on your hard disk.

Decide how to install your product. Talk your administrator if you have questions. Select one of the following methods:

- "Installing from a CD"
- "Installing from a Web download" on page 4
- "Installing from a release area" on page 4

Installing from a CD

To perform a typical installation of an IBM Rational product from the product CD:

1. Log in as a user with administrator privileges on the local computer.
2. Insert the CD into the CD drive. The LaunchPad starts. (If it does not start, click **Start > Run**, and enter the following command, where *cd_drive* is the letter of the CD drive: *cd_drive*:\Setup.exe.)

.

For more information about the installation process, see "Using the IBM Rational LaunchPad and Setup Wizard" on page 6.

Installing from a Web download

To perform a typical installation of a product from a software package that you download from the IBM Rational Licensing and Download center:

1. Log in as a user with administrator privileges on the local computer.
2. Go to the following Web site and enroll in the Passport Advantage® Program:

   http://www.ibm.com/software/howtobuy/passportadvantage/

   This site provides all the necessary information for purchasing and downloading IBM Rational software online.
3. After you are a Passport Advantage member, purchase and download IBM Rational products from the Passport Advantage Web site.
4. Extract the downloaded files, and then double-click **Setup.exe**.

   The LaunchPad starts.

For more information about the installation process, see "Using the IBM Rational LaunchPad and Setup Wizard" on page 6.

Installing from a release area

Your administrator can configure a release area for installing IBM Rational products. All installation files are included in the release area and are configured to install the product when you run a single site defaults file.

To install from a release area, obtain the following information from your administrator:

- Either the path to the site defaults file and the **setup.exe** file in the release area, or a defaults shortcut, such as sitedefs_client or sitedefs_client.lnk.
- The installation directory on your computer.
- License key information, if necessary.

You can install the product from a release area in one of two ways:

- Interactive installation. This approach requires you to use the LaunchPad and Setup wizard. Ordinarily, you accept the default settings that your administrator defines; however, by using this option, you can customize your installation. If you have concerns about the default values, see your administrator. For more information, see "Performing an interactive installation from a release area."
- Silent installation. This approach installs the product without your intervention. The default settings that your administrator defines are applied to your installation. For more information, see "Performing a silent installation from a release area" on page 5.

Performing an interactive installation from a release area

To install a product interactively from the release area:

1. Log on to your local system as a user with administrator privileges.
2. Run the installation in one of the following ways:

   - In a command window, use the **cd** command to navigate to the root directory of the release area. Then enter the command **setup.exe**. If your

administrator instructs you to use a site defaults file other than sitedefs.dat, you must specify the site defaults file that you want to use in the command. For example:

```
setup.exe sitedefs_client.dat
```

> **Note:** For more information about **setup.exe**, go to "Command syntax for setup.exe" on page 6.

- In Windows Explorer, map a drive to where the release area is located, then expand the mapped drive and run the shortcut specified by your administrator; for example, sitedefs_client.lnk or sitedefs_client.

For more information about the installation process, see "Using the IBM Rational LaunchPad and Setup Wizard" on page 6.

Performing a silent installation from a release area

When you run a silent installation, you do not see the LaunchPad or the Setup wizard. Although it may be necessary for the computer to restart and for you to log in again, the installation takes place without your intervention.

Before you begin a silent installation, verify that you have removed all earlier versions of IBM Rational products. Users who perform silent installations do not see the warning message to remove these products, but the installation does not proceed until the earlier versions of the products are removed. This warning message is saved in the installation log file, Rational_install.log. Examine this file if the installation fails. For more information about the log file, see "Rational_install log file" on page 7.

To perform a silent installation:

1. Log in to your computer as a user with administrator privileges.

   > **Note:** If you try to perform the silent installation without administrator privileges on the computer, the installation will fail, but no error message will be displayed.

2. (Optional) Map a local drive to the release area.

3. Click **Start > Run** and enter the following commands, where *local-drive* is the mapped drive or the path to **setup.exe** and *filename* is the name of the site defaults file:

   local-drive: **\setup.exe /g** *<Drive>*:*filename*.**dat**

   > **Note:** For more information about **setup.exe**, see "Command syntax for setup.exe" on page 6.

   The product specified in the site defaults file is installed from the release area to the installation directory. The default installation directory is C:\Program Files\Rational\.

   If necessary, your computer restarts. You must then log on manually. The installation resumes, and then finishes. When the installation finishes, you do not see a message indicating that the installation is complete.

   The IBM Rational License Key Administrator (LKAD) starts when the wizard completes installation only if you need to supply licensing information. For information about licensing, see "Licensing your software" on page 7.

   If the LKAD does not start, you can now use the product that you installed. Click **Start > Programs > IBM Rational > IBM Rational TestManager**.

There is no command to cancel a silent installation.

Using the IBM Rational LaunchPad and Setup Wizard

The LaunchPad starts the Setup wizard, which guides you through the software installation. To continue the installation process, follow the instructions that the LaunchPad and Setup wizard provide.

On the Features page for Rational TestManager, you can specify whether to install the entire Rational TestManager package, or a subset of it. If you need information about entering data on other wizard pages, press the F1 key for help.

The IBM Rational License Key Administrator (LKAD) starts when the wizard completes the installation only if you need to supply licensing information. For information about licensing, see "Licensing your software" on page 7.

If the LKAD does not start, you can now use the product that you installed. Click **Start > Programs > IBM Rational > IBM Rational TestManager**.

Canceling an installation

To cancel an installation, click **Cancel** in the Setup wizard. This ends the installation process.

If you close the Setup wizard while the installation is in progress, your computer might be in an unstable state, and you might need to restart it.

Command syntax for setup.exe

Installs an IBM Rational product from a Windows command prompt.

Synopsis
setup [**/g**] [*path-to-sitedefs.dat*]
[**/l** *logfilename*] [**/d**]

Description
The **setup** command starts the LaunchPad, from which you can start the Setup wizard to install the product on your computer. When running the **setup** command, you can specify the location of the sitedefs.dat file. For more information about installing from a release area and using sitedefs.dat, see "Installing from a release area" on page 4. The command also has the options to run a silent installation, create a detailed log file, and install the product in the default language of the product.

Options and arguments

/g   Runs **setup.exe** in silent mode. When you specify this option, your IBM Rational product is installed without a progress bar or notification that the installation process has completed.

/l   Creates a log file of the installation process. You must specify the location for the log file.

/d   Installs the product in English, the default language. If you do not specify this option, the product will be installed in the language of your operating system if the product has been localized for that language. This option is ignored if you previously installed other IBM Rational products in your local language; in that case, the local language version of the IBM Rational product, if available, is installed.

Example

Runs a silent installation, creates a log file, and installs the product in the default language, English.

```
setup /g \rational_release\sitedefs_client.dat /l C:\temp\install_log.txt /d
```

Command syntax for MSIEXEC.exe

If you want more options when installing products from the command line, you can use the **MSIEXEC.exe** application. For information about this application and its parameters, go to the Microsoft Web site.

To see an abbreviated display of the command and its parameters, enter **msiexec.exe /?** in a Windows command prompt.

Rational_install log file

The Setup wizard does not display an error summary. The file Rational_install.log records all installation activities. You and a customer support representative can use this file to trace most installation errors.

By default, the installation log file is in the TEMP directory. The location of the directory is set in the TEMP environment variable on the computer. To find the location, open a command window and enter echo %TEMP%.

This folder and file may be hidden. To display them in Windows Explorer, select **Show Hidden Files and Folders** when searching for the file.

The installation log is not cumulative. The log file is overwritten when you perform another installation or when you repair or modify an existing installation. If you need to save the log, either copy it to a different location or rename it before you install another product.

Licensing your software

All users need a license key to start the product. Ask your administrator which license key to use and where to obtain it.

The IBM Rational License Key Administrator (LKAD) is a tool that you can use to import license keys to your desktop computers. It can also help you set up your client to use floating licenses, and change your license configuration. The LKAD wizard simplifies these processes.

The IBM Rational Setup wizard installs the LKAD with each IBM Rational product. If the product is not already licensed, the LKAD wizard starts when the product installation completes. You can also start the LKAD by clicking **Start > Programs > IBM Rational > IBM Rational License Key Administrator**. The LKAD main window and wizard page open simultaneously. For more information, see the LKAD Help.

Follow the instructions in Table 1 to license your IBM Rational product.

Table 1. Requesting and installing IBM Rational license keys

Type of license key	Where to request license key	Installation instructions
Permanent node-locked	AccountLink (go to www.ibm.com/software/rational/support/licensing/)	Import the key on your computer by using the LKAD wizard.
Permanent floating	AccountLink (go to www.ibm.com/software/rational/support/licensing/)	Configure your client to point to the IBM Rational License Server by using the LKAD wizard. Your administrator must provide the path to the server.
Evaluation floating	Your sales representative	
Evaluation node-locked	The Web eval pages, which mail it automatically	Import the node-locked key on your desktop with the LKAD wizard.

Note: To use Rational TestManager on Windows Terminal Servers, you must configure your console system to use floating licenses.

Using Rational TestManager with IBM DB2

If you have IBM DB2® installed on your computer, you can use the information in this section to prepare to use DB2 with Rational TestManager.

Creating a DB2 database alias

Use the DB2 alias on your client desktop to access the DB2 database server. If you plan to share projects with other users, be sure to use a consistent database alias as determined by your database administrator or project administrator.

Note: Make sure you select the **Register this database for ODBC** check box.

Creating a Rational TestManager project

Ask your database administrator for the database type that is configured for Rational TestManager projects, and follow the instructions in "Creating a project in DB2" for that database type. These sections describe how to create projects in the Rational TestManager client for Windows.

Creating a project in DB2

Perform the procedures in the following sections to create a Rational TestManager project that uses DB2 for the project database.

Use the DB2 Client Configuration Assistant tool to configure access from your client computer to the DB2 database server. If you plan to share projects with other users, be sure to use a consistent database alias as determined by your database administrator.

To configure access to DB2 from Rational TestManager, the database administrator must provide the following information:
- DB2 database alias
- DB2 schema name for storing Rational TestManager projects

- Your user ID for logging on to the DB2 database
- Your user password for logging on to the DB2 database

Installing DB2 UDB Express

These are the main steps for installing DB2 UDB Express with Rational TestManager.

1. "Installing the Configuration Assistant and setting up an alias"
2. "Creating the Rational TestManager datastore with Rational Administrator" on page 10
3. "Running Rational TestManager" on page 11

The following steps are optional:
- "Migrating to DB2 databases" on page 11
- "Changing a database alias, user name, or password" on page 12

The following sections discuss each of these steps in greater detail.

Installing the Configuration Assistant and setting up an alias: The DB2 Configuration Assistant must be installed and configured on each client computer. The Configuration Assistant is available along with the DB2 server on the DB2 UDB Components for Rational Products version 8.2 CD that ships with Rational TestManager. The configuration process involves creating an alias for each datastore. The same alias must be used for every client.

Note: If you want the Administrative Client that does not include the server, you can download it from www.ibm.com/software/data/db2/udb/support/downloadv8.html .

To install the Configuration Assistant and set up an alias:

1. On each client computer, install the Configuration Assistant from either the server installation (located on the CD) or the Administrative Client (located on the Web site). Then follow the steps in this procedure to configure the client on each computer.

   Note: These are the minimum components you need to select for the Configuration Assistant (either from CD setup or from the Administrative Client):
   - From the **Client Support** menu:
     - Interfaces
     - Base Client Support
     - System Bind Files
     - Communication Protocols

     Select **This feature and all sub-features** for each component.
   - From the **Administration Tools** menu:
     - Configuration Assistant

2. Click **Start** > **Programs** > **IBM DB2** > **Set-up Tools** > **Configuration Assistant**.
3. If the DB2 Message window is open, click **Yes**.
4. Select **Search the network** and click **Next**.

5. Expand the **Known Systems** folder. If you see the DB2 database server host on which the database resides, expand it, select the database name for which you want to create an alias, and then click **Next**.

   If you do not see the DB2 server host that you need or if you cannot expand the **Known Systems** folder, expand the **Other Systems** folder.

   If you cannot expand either the **Known Systems** or the **Other Systems** folders, follow these steps:

   a. Click **Add System**.

   b. Complete the Add Systems window by performing the following actions:

      1) Type the name of the computer on which you created the empty database in the **System Name** field.

      2) Do not make any changes to the **Host Name** field; it is filled in automatically and is the same as the system name.

      3) Type the name of the database you created in the **Node Name** field.

      4) Do not make any changes to the **Operating System** field; it is filled in automatically as `Windows`.

   c. Click **OK**.

   d. Expand the **Database** folder and click **Next**.

   Note: If you still do not see the server host that you need, talk to your database administrator. There might be a network problem.

6. Type an alias name in the **Database alias** field. (Use the same alias for the database on each client computer.)

7. (Optional) Type a comment in the **Comment** field.

8. Click **Next**.

9. Select the **Register this database for ODBC** and then click **Finish**.

10. In the confirmation window that opens, follow this procedure to test access to the DB2 database:

    a. Click **Test Connection**.

    b. Complete the Test Connection window by performing the following actions:

       1) Select **ODBC** and leave the other fields as they are.

       2) Type the user ID and password of the user that has privileges to access the database.

       3) Click **Test Connection**.

       4) Click **Cancel** to close the window.

       5) Click **Close**.

    Note: If the connection fails, try to connect by using the following commands from the DB2 command-line editor:

    db2
    db2> **catalog TCPIP node node-name remote host-name server port-number**
    db2> **catalog database database-alias at node node-name**
    db2> **terminate**

11. Repeat steps 1 through 7 for each client computer.

Creating the Rational TestManager datastore with Rational Administrator: You can create the datastore from either a client or the server.

Follow these rules when creating a datastore:

- Be sure that there is an alias associated with the database for all datastores that you will run Rational TestManager with.
- Use the same alias name for each client that is connecting to the datastore.
- Make sure that the user name and password of the alias have the authority to modify the database.
- Be sure that there is only one project for each database (no more than one project in a database).

To create the datastore for DB2 databases:

1. In Rational Administrator, perform one of the following actions:
   - In the New Project Summary window, create a project and select **Configure Project Now**.
   - Right-click an existing project and click **Configure**.
2. In the Configure Project window, click **Create** next to **Test Assets**.
3. In the Create Test Datastore window, select **IBM DB2 UDB** and then click **Next**.
4. In the IBM DB2 UDB Components for Rational Products Settings window, perform the following actions:
   a. Leave the **New test datastore path** field as is. It reflects the path of the selected project.
   b. Type the alias that you created when you configured the DB2 Administrative Client in the **Database alias** field. See "Installing the Configuration Assistant and setting up an alias" on page 9.
   c. Type the user name that has access to connect to the database in the **User Name** field. If you are using Windows authentication, include the domain name followed by a backslash (for example, `Rational\Myname`).
   d. Type the password that has access to connect to the database in the **Password** field.
5. Click **Next**.
6. In the Initialize New Test Datastore from Existing Assets window, select any items you want to initialize and then click **Next**.
7. The Create Test Datastore Summary window opens. To change any information, click **Back** and return to the appropriate window.
8. Click **Finish** and watch for the `Successfully Created` message.

Running Rational TestManager: Run Rational TestManager as described in the *IBM Rational TestManager User's Guide*. Use the same user name and password that you assigned to the datastore.

The *IBM Rational TestManager User's Guide* is available in the IBM Publications Center at www.ibm.com/shop/publications/order.

Migrating to DB2 databases

You can migrate from existing Microsoft Access or SQL Anywhere databases to DB2 databases.

Note: You cannot revert from DB2 databases back to Microsoft Access or SQL Anywhere databases.

Before migrating an existing database to DB2, complete the following actions:

1. "Installing the DB2 server" on page 20
2. "Creating an empty DB2 database for each Rational TestManager project" on page 21
3. "Installing the Configuration Assistant and setting up an alias" on page 9
4. "Creating the Rational TestManager datastore with Rational Administrator" on page 10
5. Upgrade the project to the version of Rational TestManager that you want to use (if you are migrating as part of an upgrade).

To migrate an existing database to DB2:

1. In the Rational Administrator, right-click the project and select **Connect**.
2. Right-click a datastore and select **Properties**.
3. Click **Advanced Database Setup**.
4. In the Advanced Database Setup window, select **Use IBM DB2 UDB** for database engine.

   Complete the window by entering the following information:

   a. In the **Alias** field, type the alias that you created when you configured the DB2 Administrative Client. See "Installing the Configuration Assistant and setting up an alias" on page 9.

   b. In the **User Name** field, type the user name that has access to connect to the database. If you are using Windows authentication, include the domain name followed by a backslash (for example, `Rational\Myname`).

   c. In the **Password** field, type the password that access to connect to the database.
5. Click **OK**.

Changing a database alias, user name, or password

You can change the alias, user name, or password used to connect to a DB2 database. To modify the properties of a DB2-based datastore:

1. In the Rational Administrator, right-click the project and select **Connect**.
2. Right-click a datastore and select **Properties**.
3. Click **Advanced Database Setup**.
4. In the Advanced Database Setup window, select **Use IBM DB2 UDB** for the database engine.

   Complete the window by entering the following information:

   a. In the **Alias** field, type the new alias.

   b. In the **User Name** field, type the user name that has access to connect to the database. If you are using Windows authentication, include the domain name followed by a backslash (for example, `Rational\Myname`).

   c. In the **Password** field, type the password that has access to connect to the database.
5. Click **OK**.

Note: After you change user names on a project, you must rebuild the datastore.

Modifying or repairing an installation

To modify or repair an installation, use Add or Remove Programs in the Windows Control Panel.

Before you modify or repair an installation of any product, save the original installation log to a different location or rename it. If you do not, it will be overwritten.

To modify or repair an installation of a product:

1. Log in as a user with administrator privileges on the local computer with the IBM Rational product that you want to modify or repair.
2. Click **Start > Control Panel > Add or Remove Programs**.
3. Select the IBM Rational product that you want to modify or repair and click **Change**.
   - **Modify.** Use this option to change the products and product features installed. Use the Custom Setup page of the Setup wizard to clear or select features. To modify a product installation:
     a. Select **Modify**, and then click **Next**
     b. On the Custom Setup page, click **Next** to select or clear features.
     c. Click **Next**, and then click **Install** to begin the installation.
   - **Repair.** Use this option to repair a damaged registry or to replace files that you may have inadvertently deleted. This option does not repair incomplete or unsuccessful installations. To repair a product installation:
     a. Select **Repair**, and then click **Next**.
     b. Click **Install** to begin the installation.

Uninstalling IBM Rational products

This section provides information about removing earlier versions of IBM Rational software.

Before uninstalling IBM Rational products

This section provides general requirements that must be met before you remove IBM Rational products. It also describes which components the Setup wizard does and does not remove from the computer.

- To remove IBM Rational products from a computer, you must have administrator privileges on the local system.
- If you plan to move the application to another system, first return the license key file to your IBM Rational software account. Use AccountLink to return a node-locked or floating license key. To find AccountLink, go to https://www.software.ibm.com/reg/rational/rational-i and click **Request and Manage License Keys**. For more information about moving or returning licenses, see the *IBM Rational License Management Guide*, which you can view or download from the IBM Publications Center at www.ibm.com/shop/publications/order.
- Removing an IBM Rational product does not delete the license key file, project databases, and other files that you created while using the product. If you plan to install an upgrade of the IBM Rational product to a different drive or use a new installation path, back up these files and manually remove them. If you do not remove them, the Setup wizard may find these files and install the application in the previous location rather than the new location.
- Before removing the IBM Rational products (including the IBM Rational license server) from clients, record the specified license server host names in the IBM Rational License Key Administrator (LKAD).
  1. Start the LKAD by clicking **Start > Programs > IBM Rational > IBM Rational License Key Administrator**.
  2. Find the host names by clicking **Settings > Client/Server Configuration**.

3. After you install the new IBM Rational products, reset the license server name in the LKAD. The LKAD wizard starts after the installation. If the wizard does not start, click **Start > Programs > IBM Rational > IBM Rational License Key Administrator**.

• Make sure that no one is using the application or any associated files. You cannot remove files that are in use.

Using Add or Remove Programs to uninstall IBM Rational products

Use the Add or Remove Programs function in the Windows Control Panel to select and remove the IBM Rational product you want to uninstall. Click **Start > Control Panel > Add or Remove Programs**. Highlight the product and click **Remove**.

Uninstalling from the command line

If you want to uninstall IBM Rational products from the command line, you must use the **MSIEXEC.exe** command. For information about this command, see "Command syntax for MSIEXEC.exe" on page 7.

Chapter 3. Installation instructions for administrators

This chapter guides administrators through the tasks required to configure the installation of IBM Rational TestManager. Table 2 provides an outline of these tasks.

Table 2. Rational TestManager administrator installation tasks

Step	Task	Document to reference
1	Upgrading Rational TestManager as part of an IBM Rational Suite.	Chapter 4, "Upgrading from an IBM Rational Suite installation," on page 25
2	Reviewing system and software requirements.	"System and software requirements" on page 1
3	Configuring a license server for IBM Rational software and configuring licensing.	"Setting up and configuring IBM Rational Common Licensing" on page 16
4	Installing database client software if you plan to use DB2 database for your Rational TestManager projects. Install this on the same computer that you plan to use for your initial installation of Rational TestManager.	For information about installing client software, see the DB2 documentation.
5	Determining and configuring the deployment of your IBM Rational products. Use the IBM Rational Setup wizard to set up a release area if you expect your team to perform an interactive or silent installation from a release area. You will have to provide your team members with the path to the release area, the name of the defaults file, and any necessary licensing information. **Note:** This is not necessary if your team is installing products directly from the CD or from a Web download.	"Deploying the product" on page 16
6	Performing an initial installation of the product to test the license server and deployment method if you have purchased floating licenses and are installing from a release area.	"Installing from a release area" on page 4
7	Configuring an enterprise database for Rational TestManager projects on IBM DB2.	"Configuring a database" on page 20

For all administrator installation and licensing tasks, you must be logged on to an account that has administrator privileges on the local computer. If you are not logged on with administrator privileges, the product installation will fail, and the installation log file will not indicate that it was incorrect privileges that caused the failure.

Setting up and configuring IBM Rational Common Licensing

The administrator tasks for setting up and configuring licensing depend on the type of licenses that you use. The *IBM Rational License Management Guide*, which you can view or download from the IBM Publications Center at www.ibm.com/shop/publications/order describes the license management tools and how to set up your license server configuration. It also describes the different types of license keys and provides instructions for requesting, installing, upgrading, and moving licenses.

Note: If you are upgrading from a previous version of the product and already have licenses and the license server installed, you can skip this task.

Deploying the product

Configuring deployment of your software product requires that you understand the types of deployment methods available for your product. You can then select the appropriate deployment type for your users and configure your software for the selected deployment method.

Selecting a deployment method

Select the deployment type that is most efficient for you and your users. Table 3 describes each deployment method.

Table 3. Deployment methods

Deployment type	Description
Installation from the IBM Rational product CD	End users can install the product directly from the IBM Rational product CD. For the end-user procedures, see "Installing from a CD" on page 3.
Installation from a Web download	End users can download the product from the Passport Advantage Program (go to http://www.ibm.com/software/howtobuy/). They can then install the product from the downloaded files. For the end-user procedures, see "Installing from a Web download" on page 4.
Installation from a release area	Installation can be either interactive or silent. These methods can reduce your work as you deploy a product in your development environment. Both require you as an administrator to make preparations. For instructions, see "Creating a release area and site defaults file" on page 17. • Interactive installation: End users run the Setup wizard to install the product. For end-user procedures, see "Performing an interactive installation from a release area" on page 4. • Silent installation: This method allows users to perform unattended installations. A silent installation does not require users to select options or make decisions. Silent installations ensure that all users have the same products, features, and options on their desktops. For more information, see "Setting up silent installations of IBM Rational products" on page 19. For end-user procedures, see "Performing a silent installation from a release area" on page 5.

Creating a release area and site defaults file

A release area is an area on a network shared drive that contains installation files that you as an administrator can configure for easy and consistent installation by users. These files include one or more site defaults files that contain default settings that apply to all users who perform a standard installation from the release area.

There are two methods for creating site defaults files:

- Using the Setup wizard. The wizard creates a disk image of product files in a shareable directory on the network. It also creates a release area. For instructions, see "Using the Setup Wizard to create a release area and site defaults file" on page 17.
- Using the Site Preparation wizard. This wizard, like the Setup wizard, creates a disk image of product files in a shareable directory on the network, but does not create a release area. You must run the Site Preparation wizard multiple times to create multiple site defaults files. For instructions, see "Using the Site Preparation Wizard to create multiple site defaults files" on page 18.

Using the Setup Wizard to create a release area and site defaults file

This section explains how you can use the Setup wizard to create a release area and populate it with site defaults files. You can use this release area to install IBM Rational products on servers or client desktops.

The default site defaults file is sitedefs.dat. You can create multiple site defaults files that are specific to different products or teams and assign them meaningful names, such as developers.dat or qualityengr.dat. Users can install the product with the configurations you create by specifying the site defaults file with the **setup.exe** command, for example, **setup.exe developers.dat**. (If users run the command with no arguments, the Setup wizard uses the settings in sitedefs.dat.) Or you can prepare shortcuts for these files, such as developers or developers.lnk, which users can run from their desktops.

When creating a site defaults file, do not add a file name extension (for example,sitedefs.developers.dat. The maximum length of the path for the release area of an Enterprise Deployment installation is approximately 30-35 characters. The exact limit depends on the product that you are installing, and on the length of the paths of the installed files.

To create a release area and populate it with site defaults files:

1. Log in as a user with administrator rights on the local computer.
2. Make the release area directory shareable. Even if the drive that contains the directory is already shareable, making the directory itself shareable makes it easier to find the product release area.
   a. In Windows Explorer, right-click the network release area and click **Sharing**.
   b. On the Sharing page of the properties window, click **SHARE this folder** and provide a meaningful name, such as 7.0 Release Area.

      The Setup wizard creates a shortcut to the site defaults file only if the release area is created under a network share. The shortcut opens in the release area, for example, as sitedefs or developers without the file extension .dat.
3. Insert the product CD into the computer's CD drive; or, if you have downloaded the software, click **Setup.exe** after you extract the files. If autorun is enabled on your computer, the LaunchPad starts.

If autorun is disabled on your computer, click **Start > Run** and enter *cd_drive*:
\Setup.exe, where *cd_drive* is the letter of the CD drive.

4. Click **Install IBM Rational TestManager**.

Follow the instructions in the LaunchPad and Setup wizard. The Setup wizard
guides you through the software installation. Enter the required information on
each page of the wizard. (All required information is shown in the left panel of
the wizard with a red dot.) Use the following instructions to use the
Deployment Method, Features, and Windows IDE pages of the Setup wizard to
configure the installation process:

- On the Deployment Method page, select the **Enterprise Deployment** option.
- On the Features page for Rational TestManager, you can specify whether to
  install the entire package, or a subset of it.
- On the Windows IDE page for Rational TestManager, you can specify
  whether to integrate with Microsoft Visual Studio .NET 7.0, Microsoft Visual
  Studio .NET 7.1, with both, or with neither. The IDE must be installed before
  you can integrate it with other products.

  If you need information about entering data on other wizard pages, press the
  F1 key for help.
- Supply a license server name if you are using floating licenses.

When you have finished, the wizard saves the site defaults information to a file.
The wizard reports the name of the shortcut that is created for the data file. You
can run setup with the data file by clicking the shortcut in Windows Explorer.

Testing your site defaults file

When you create a release area, you can install the product on your own computer
to test your site default files.

To perform this installation, follow the instructions in "Performing an interactive
installation from a release area" on page 4. Be sure to click **Use the standard
configuration** on the Site Default Configuration page.

If files required for the installation are in use while the Setup wizard is running
and shared components must be installed, the Setup wizard may need to restart
your computer. If so, a Restart Windows page opens.

Using the Site Preparation Wizard to create multiple site defaults files

In some cases, your site might require multiple site defaults files.

To create multiple site defaults files for a release area:

1. Create the initial release area as described in "Using the Setup Wizard to create
   a release area and site defaults file" on page 17. Set up this area with the
   site-specific parameters needed by the first group of users.
2. Open the site defaults file created in Step 1 (sitedefs.dat, for example) by
   running **siteprep.exe** (in your release area) and clicking **Open**. The Site
   Preparation wizard displays the values set in sitedefs.dat. Keep the values that
   apply to both groups and change the values to meet the needs of the second
   group.
3. Click the **Save the file under another name** icon to save a new site defaults
   file. Enter a file name and folder for the new site defaults file when prompted.

Setting up silent installations of IBM Rational products

To set up and test the performance of a silent installation:

Note: If users click **siteprep.exe** without specifying a site defaults file and a sitedefs.dat file is not in the release area, the Site Preparation wizard creates a new site defaults file.

1. Create a site defaults file and a release area (optional) on the network by using one of the following options:

   a. Use the **Enterprise Deployment** option in the IBM Rational Setup wizard to create a site defaults file and a release area to deploy the product to your users. For instructions, see "Creating a release area and site defaults file" on page 17.

      Or, use the Site Preparation wizard by double-clicking **siteprep.exe** in the CD or IBM Web download (or enter **siteprep.exe** in a command prompt) to create a site defaults file without the release area.

   b. You can customize site defaults files for different sets of users. For more information, see "Using the Site Preparation Wizard to create multiple site defaults files" on page 18.

2. If you want to run the silent installation to test the site defaults file, enter the command `setup.exe /g [sitedefs file]` to start the Setup wizard. You should not see any installation screens displayed on your computer during the installation.

   The file directs the Setup wizard to install program files on your computer. If necessary, your computer will restart. When you log on again, the installer restarts and finishes. When the installation is finished, you do not see a screen to indicate that the installation is complete.

   If you did not specify the license server in the site defaults file, you or your users might have to configure licensing manually after the Setup wizard finishes. For more information, see "Licensing your software" on page 7.

3. Give users the following information so that they can perform silent installations on their computers.

   - The path to the site defaults file and the **setup.exe** file in the release area.
   - The shortcut to the site defaults file, if you created one and want the user to use it.
   - The installation directory on the user's computer.
   - License key information, if necessary.

Also, ensure that users remove all earlier versions of IBM Rational products from their computers. Users who perform silent installations do not see the message to remove earlier versions of IBM Rational products. The installation does not proceed until all products are removed. An installation message is saved in the user's installation log file. If the installation fails, have users examine the log file. For more information about the log file, see "Rational_install log file" on page 7.

For information about **setup.exe** command syntax, see "Command syntax for setup.exe" on page 6 or type **setup /?** in a command prompt.

Configuring a database

Rational TestManager supports IBM DB2 as a database engine for test datastores. DB2 UDB Components for Rational Products version 8.2 is shipped with Rational TestManager. This database platform replaces SQL Anywhere as the database platform offering. This release of Rational TestManager does not support SQL Anywhere.

Note: DB2 UDB Components for Rational Products version 8.0 contains all the features and function of DB2 UDB Express version 8.2.

Supported versions of DB2

Rational TestManager supports any DB2 database created with the following software:

- DB2 UDB Components for Rational Products version 8.2 (shipped with Rational TestManager)
- DB2 UDB Express version 8.2
- DB2 version 8.2

Note: Only Microsoft Windows versions of DB2 are supported.

Installing and using DB2 UDB Express

These are the main steps for installing and using DB2 UDB Express with Rational TestManager:

1. "Installing the DB2 server"
2. "Creating an empty DB2 database for each Rational TestManager project" on page 21

The following sections discuss these steps in greater detail.

Installing the DB2 server

To use Rational TestManager with DB2 databases, you must install one of the supported DB2 software versions on your database server.

Note: DB2 is a case-sensitive database.

Table 4. Recommended and minimum requirements for the DB2 server

	Recommended	Minimum
Processor	P4 2Ghz (or equivalent)	P3 600 (or equivalent)
Memory	2 GB of RAM	512 MB of RAM
Drive	10000 RPM SCSI drive	7200 RPM drive with at least 2 BG free
Network	100 MB network connection	10 MB network connection

Note: These specifications depend on the size and number of the databases you create, the number of clients you expect to have at any given time, and other processes that may be running on the server.

To install DB2 or DB2 Express on your server, follow the instructions in the online help.

To install DB2 UDB Components for Rational Products version 8.2 from the provided CD:

1. Close all applications.
2. Insert the CD.

   If the installation does not start immediately, navigate to the **setup.exe** file and double-click it.
3. Follow the instructions on the screen.
4. After the installation completes, restart your computer.

Note: When creating a DB2 database on a supported AIX platform, make sure the file system where the database resides is set to **large file enabled** to enable database control files to exceed 2 GB.

Creating an empty DB2 database for each Rational TestManager project

An empty DB2 database must exist for each Rational TestManager project so that you later populate it with a Rational TestManager datastore. You create the empty database on the same machine on which the DB2 server is installed.

To create an empty DB2 database, you must complete the following steps:

1. "Creating an empty database"
2. "Configuring the database using the Configuration Advisor wizard" on page 22
3. "Creating the table spaces" on page 22

Each of these steps is described in greater detail in the sections that follow.

Creating an empty database: You need to create an empty database for Rational TestManager. All the Rational TestManager clients will be connected to this database. This database will be used in the Rational Administrator when you create the Rational TestManager datastore. To create an empty database:

1. Click **Start > Programs > IBM DB2 > General Administration > Tools > Control Center**.
2. In the DB2 Control Center window, expand **All Systems**, and expand the host name that corresponds to the database server name. Then expand **Instances** and expand **DB2**.
3. Ensure that all DB2 services are running on the DB2 server host.
4. Right-click the **Databases** folder and select **Create Database > Standard**.

   Note: If the database was not created, run the following commands from the DB2 command-line editor:

   > **db2**
   > db2> **connect to** *database-name*
   > db2> **bind db2schema.bnd blocking all grant public**
   > db2> **disconnect all**

5. In the **Database name** field, type the name of the database.

   Note: DB2 supports database names of up to eight characters.

6. Select a default drive and type an alias name in the **Alias** field (up to eight characters).
7. (Optional) Provide a comment in the **Comment** field.
8. Click **Next**.

9. On the Specify how and where to store the user tables page, select **High Performance** and then click **Add**.

a. Select a location on the DB2 server to store the user tables and give it a file name.

b. Type a size for the table. A good starting point is 200 MB. Use a larger size if you think your tables will grow.

c. Click **OK**.

10. Click **Finish**.

11. When you see the message `Successfully Created`, click **Yes** to start the Configuration Advisor.

Configuring the database using the Configuration Advisor wizard: To configure the database:

1. You can start the Configuration Advisor wizard by clicking **Yes** in step 9 of the procedure "Creating an empty database" on page 21. Perform the actions in Table 5 to progress through the Configuration Advisor wizard. Click **Next** after you complete each page.

Table 5. Configuration Advisor pages and actions

Page	Action
Confirm the name	Do not make any changes.
Specify how much memory you want the database manager to use	Drag the **Target Memory** slider to specify the maximum memory that the database can use.
Select the type of workload that best reflects your database	Select **Transactions (order entry)**.
Specify a typical database transaction	Select **Fewer than 10 (short transaction)**.
Specify a database administration priority	Select **Faster transaction performance (slower recovery)**.
Specify whether the database is populated with data	Select **No**.
Estimate the number of applications connected to this database	**Average number of connected local applications**: Leave the choice as 0. **Average number of connected remote applications**: Select the number of Rational TestManager clients you expect to connect.
Select an isolation level that best reflects your application	Select **Cursor stability (many locks of short duration)**.
Enabling the DB2 scheduling function	Do not make any changes.

2. Click **Finish**.

3. When you see the message `Command completed successfully`, click **Close**.

Creating the table spaces: Because the default table space is too small for creating a datastore, you must create the table space manually.

To create the table spaces:

1. Under the *database-name* folder for the database you created, right-click the **Table Spaces** folder and click **Create**.

2. Perform the actions in Table 6 on page 23 to progress through the Create Table Space wizard. Click **Next** after you complete each page.

Table 6. Create Table Space wizard pages and actions

Page	Action
Specify a name for your new table space	Type a name in the **Table space name** field. **Note:** (Optional) Type a comment in the **Comment** field.
Specify the type of table space you want to create	Select **Regular**.
Specify the buffer pool for your new table space	1. Click **Create**. 2. Complete the Create Buffer Pool window by performing the following actions: a. Type a name in the **Buffer pool name** field. b. **Page size**: 32. c. Select the list item **Use Extended Storage**. d. Do not make any other changes. e. Click **OK**. 3. Select the buffer pool you just created.
Select the space management system that you want to use.	Select **System-managed space (low maintenance)**.
Define containers for this table space.	1. Click **Add.** 2. Complete the Define Container window by performing the following actions: a. Select a drive and location for the container from **Look in**. b. Type a name for the container in the **File name** field. 3. Click **OK**. 4. Select the container you just created.
Specify the extent and prefetch sizes for this table space.	Select the average size of a table in this table space. **Note:** You should usually select **Less than 200MB**. If you expect to have a very large datastore, select **Between 200 MB and 2 GB**.
Describe hard drive specifications.	Define the specifications for the hard drive where the DB2 database resides.
Specify the dropped table recovery option for your new table space.	Select **Enable dropped table recovery**.

3. Click **Finish**.
4. In the left pane of the Control Center, select **Table Spaces**.
5. In the right pane of the Control Center, right-click the new table space name you created and select **Privileges**.
6. On the Group page, click **Add Group**, select the **Public** group, and click **OK**.
7. Select **Public** (the group you just added).
8. In the **Privileges: USE** area, select **Yes** and click **OK**.

Running Rational TestManager

Run Rational TestManager as described in the *IBM Rational TestManager User's Guide*. Use the same user name and password that you assigned to the datastore.

The *IBM Rational TestManager User's Guide* is available in the IBM Publications Center at www.ibm.com/shop/publications/order.

Chapter 4. Upgrading from an IBM Rational Suite installation

In this release, the products offered can only be installed individually. You can no longer install a collection of IBM Rational products with a single installation procedure.

If you are installing IBM Rational products for the first time, follow the instructions in the installation guide for each product that you install.

If you have previously installed an IBM Rational product that was a part of an earlier IBM Rational Suite release, note that version 7.0 is a major release that includes changes to installation and other operating processes, dependencies between products, and interoperability with product integrations. In some cases, tasks must be performed in a specific sequence, for example, upgrading server components before upgrading clients.

As of version 7.0, all IBM Rational Suite products installed on a computer must be the same version. How different versions are removed depends on which versions are installed.

- If you installed multiple IBM Rational products as part of IBM Rational Suite, and those products are version 2003.06.*xx*, installing version 7.0 of any product uninstalls all products in IBM Rational Suite, not just the one you are upgrading. After installing a product in the current release, you must reinstall all other version 7.0 IBM Rational products that you use.
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- If you installed multiple IBM Rational products not as part of IBM Rational Suite, when you install version 7.0 of any product, the other products are not uninstalled. You must install and upgrade each product separately.

Site defaults file required for each product

You can no longer use the Site Preparation wizard to create a single site defaults file that installs multiple products in the IBM Rational Suite. For version 7.0, you must create and run a site defaults file for each product.

Change to search order for license keys

If you have a license for a previous release of IBM Rational Suite, that license is valid in the current release, but the search order for the license key has changed.

In earlier releases, when a product from IBM Rational Suite was installed, the IBM Rational License Key Administrator (LKAD) application tried to find a license key that corresponded to IBM Rational Suite. If such a key was not available, the LKAD searched for a key that corresponded to the product itself.

In version 7.0, the LKAD looks for the product-specific license key first. You can still use the License Usage Mapper in the LKAD to change this search order or have the application not search for an IBM Rational Suite key. For more information about licensing, see the *IBM Rational License Management Guide*.

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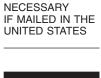IF MAILED IN THE
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