



IBM Rational ClearQuest EmailPlus Package Version 2.0 Release Notes and Installation Guide



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1 Introduction

The purpose of this document is to:

- Document the environment requirements of the package
- Document what has changed since previous releases
- Describe how to install the package

Details of how to apply the EmailPlus package to a ClearQuest Schema are contained in the EmailPlus Administrator Guide.

1.1 Overview

The ClearQuest EmailPlus Package (EmailPlus) provides a comprehensive solution to the problem of email notifications. The functionality provided by the out-of-the-box ClearQuest Email Rules package, provides basic facilities to communicate record changes to users. EmailPlus provides a number of additional features to provide an enhanced email experience for users.

These features include support to:

- Customize the content of the message subject and body texts to allow boilerplate text to be included.
- Include dynamic content in emails in addition to field old or new values.
- Include rich content (HTML).
- Provide access to SMTP restricted servers.
- Attach files to emails.
- Allow enhanced conditions to construct the rules.
- Allow users to self subscribe to rule or record notifications.
- Enable enterprise-wide configuration of email notifications in addition to allowing individuals to turn on or off email notifications.
- Provide a number of performance improvements, particularly if queries are used.
- Extend the rules and data displayed through customer provided extensions.

2 Package contents

The EmailPlus package consists of four components:

- The ClearQuest EmailPlus Package itself,

- An optional stand-alone “EMP Relay application” which must be deployed on a Windows server and will not work on a UNIX/Linux server,
- Two batch files to register the package (One file for ClearQuest 7.0.x and earlier releases and one for ClearQuest 7.1.x and later releases), and
- The EmailPlus package documentation.

The EmailPlus package is written entirely in PERL, but even if your selected schema script language is VBScript, you can still use this package. It is possible to deploy the package in mixed environments to ClearQuest Web or ClearQuest clients running on Windows or Unix/Linux platforms.

The EMP Relay component used with the SMTP Relay and PostOffice Relay mail transport modes is a Windows only application. More details about when to deploy this component are available in the EmailPlus Administrator Guide.

Note: The EMP Relay application currently runs as a normal application *not* a Windows service. It must run at all times if you are using a mail transport mode that requires it.

3 Release notes

3.1 Version 2.0

Version 2.0 is a major release in which the package language was converted from VBScript to PERL. This package is now supported in the ClearQuest client on Windows, Unix, and Linux platforms. It also works with ClearQuest Web.

Due to the major change in the package, please read all of the release and installation notes if you are upgrading from a 1.x Version of the EmailPlus package.

There are no new major features, but instead the focus of this package is support for Unix/Linux.

The following are known problems with this release:

- When using PNG images in EmailPlusTemplates, the images may not correctly display as inline images in some email clients. This is due to PNG image support in email clients. To work around this, use either JPG or GIF image file formats.
- The EmailPlus Relay Component is provided in two language variants. English only and English/Japanese/Chinese. The latter version defaults to the Japanese language in locales other than these. If English is desired, use the English only variant of the component. The component can be found in the sub-directory Pkg_util under each of the package revisions for 2.0 / 2.0.2 & 2.0.3.

History of Previous Releases

3.2 Version 1.7

Version 1.7 is a maintenance release fixing a few small problems introduced by Version 1.6. Version 1.6 was never made public, so please see the Version 1.6 section for full details of what is new over version 1.5.

Some small changes occurred in the procedure for installing the package so please read section ?? for full details even if you are familiar with previous versions. This change was necessary because of some differences in the installation of ClearQuest 7.1.

3.3 Version 1.6

This is a maintenance release that also eliminates the dependence on the third party custom control *ToolSack Baseline Components*. *This release was never made publically available*

The release also fixes the following problems:

- This release fixes a problem whereby when a user subscribes to a record using the special interest feature, every other person so subscribed gets an email which essentially tells them that somebody else has changed their subscription. EmailPlus now ignores changes to the subscription field when evaluating changes. If other fields change at the same time, then an email will still be generated.
- This release fixes a problem in the email template validation processing that incorrectly reported an error if the state field was included in the template. This was caused by an inappropriate use of a ClearQuest API call. This has now been fixed.
- Instead of the *ToolSack Baseline Components* control, the package now makes use of facilities of Microsoft Collaboration Data Objects (CDO) component for its SMTP Client and some additional facilities of the Microsoft XML DOM Document interface for its HTML Post Request which is now used to talk to the Relay Service Component *CQ SMTP Forwarder*.

3.4 Version 1.5

Version 1.5 is a maintenance release and also introduces some extensions to capabilities.

The release fixes a few problems:

- This release fixes a problem where rules do not execute even though they should. If there were two or more To & CC addresses for a message then the rule would fail to execute. What was intended to prevent email with no addresses executing was actually too aggressive.
- This release fixes a number of problems where embedded charts were used in an email and for some reason or other the chart could not be executed or returned no data.

The release introduces the follow extra capabilities:

- The expression expansion capabilities have been extended to make them much more useful. In previous versions, the expressions had to be completely specified in the template and could contain no data from a record field. Although it was previously possible to specify a field expansion within an expression, the expression did not correctly evaluate when the template was defined because the field value was expanded as just plain text. What was actually needed was a properly typed value to be returned. So a date should have been returned as a date object, a string as a quoted string and so on. The package now correctly identifies the context with a Meta tag expansion and returns a properly typed value instead of just the field content.

For example, an expression likes this:

```
#@expression::formatdatetime(#?submit_date?#,1)@#
```

returns a properly formatted date as found within the "submit_date" field – like this:

15 July 2008

See Section 3.1.1 in the EmailPlus Administrators Guide for details

A pre-configured demonstration database is now provided in the install set to allow you to get up and running quickly with a play environment to experiment with.

3.5 Version 1.4

Version 1.4 is a maintenance release which deprecated the use of the API ValueChangedThisAction in ownership tests as it does not record changes to fields if the change occurs during the action initialization hook.

3.6 Version 1.3

Version 1.3 is a maintenance release that fixed a problem reintroduced in Version 1.2 having to do with ownership. Ownership code was completely rewritten and optimized to minimize queries. It also allows the flexibility for owner fields to be simple text fields containing a ClearQuest User ID.

3.7 Version 1.2

Version 1.2 contains no new features only fixes for the following problems:

- Ownership notification rule - In some circumstances, the email was generated with the user ID of a user, not their email address, or an email was generated even when the owner had not changed
- Eliminated a query in ownership notification execution.
- Dependent fields on CQWeb for the EmailPlusRule record

3.8 Version 1.1

This release contains no new features but only problem fixes and clarifications:

- Fixed problem with subscribing to record or rules that gave an error when the list contained more than one user.
- Fixed problem with subscriptions and general group memberships. This was caused by an SQL problem when using SQL Server database. Queries have been rephrased to avoid this problem.
- Subscription records are now deleted where possible when removed from a rule. The documentation was updated to indicate there is a manual process required in replicated environments.
- Fixed problem that allowed Special interest subscriptions when no template existed to trigger them. Revisit Section 6.3 of the EmailPlus Administrator Guide if you had previously manually enabled any stateless record types. The record script code has changed slightly.
- Fixed problem with group list restriction on subscriptions that appeared to have no effect.
- Fixed problem with Subscribe action not working for anyone – related to SQL problem.
- Minor change to some cache names to comply with package naming standards.

4 Installing the Package

The ClearQuest EmailPlus package contains four components:

- The ClearQuest EmailPlus Package.
- Two batch files to register the package: one file for ClearQuest 7.0.x and one for ClearQuest 7.1.x and later releases.
- The EMP Relay application (Windows only).
- The EmailPlus package documentation.

The ClearQuest EmailPlus package needs to be installed on every machine where you intend to run the ClearQuest Designer tool. It does not need to be installed on ClearQuest client-only machines.

The EMP Relay application should be installed only on one machine with the ClearQuest client installed per ClearQuest site and then only if a mail transport mode (SMTP Relay or PostOffice Relay) is selected (which makes use of it).

If you are upgrading from Version 1.x of the ClearQuest EmailPlus package then you should read section 4.1.

If you are installing EmailPlus 2.0 for the first time then please read Section 4.2.

4.1 Upgrading from EmailPlus 1.x

If you are upgrading from Version 1.x of EmailPlus you should also review any customizations you have made to the EmailPlus package as these will need to be converted from VBScript to PERL.

All EmailPlusTemplate and EmailPlusRule records will need to be reviewed and any VBScript expressions will need to be replaced with PERL versions. If you do not update the expressions they will not be correctly evaluated by PERL. It is recommended that you set up a test environment running the PERL version to test and convert your existing EmailPlusTemplate and EmailPlusRule records.

The Name field on the EmailPlusTemplates and the EmailPlusRule records have been modified so that they may only contain the characters [A-Z], [a-z], [0-9], _ (underscore), and – (dash). If you have existing EmailPlusRule or EmailPlusTemplate records with names which include characters that do not conform to the new convention then they will need to be renamed. Be sure to rename EmailPlusTemplate records first and then EmailPlusRule records so that the rules and the EmailPlusAction records are automatically updated correctly. This renaming should be done prior to upgrading to the EmailPlus 2.0 package.

4.2 Installation Steps

This section tells you how to register the EmailPlus package with ClearQuest. Details of how to use it with your schema are contained in the EmailPlus Administrator Guide.

The following are some important cautionary notes:

- Make a full backup of your ClearQuest databases before you apply the package.
- Apply the package to a copy of your schema first while evaluating it.
- You should be fully conversant with the implications of applying a package to a schema before you do this to any live environment. In particular remember that a package cannot be removed from a schema without deleting all schema version(s) that contain it and all databases that use any of those schema versions. See the [ClearQuest Administrator Guide](#) for further details
- The install location varies depending upon the version of ClearQuest in use and the location chosen by you to install the product. Use this table to determine the correct locations and script to execute.

Table 1 - Install locations

ClearQuest Version	Default Install Location	Register Script
7.0.x or earlier	C:\Program Files\Rational\ClearQuest\packages	RegisterPackage.bat
7.1 or later	C:\Program Files\IBM\RationalSDLC\ClearQuest\packages	RegisterPackageCQ7.1.bat

If you chose to install ClearQuest to a different drive or path you should use that path. In this case you will also need to take a copy of the relevant RegisterPackage script and edit it to correctly reflect your installation location.

The zip file EmailPlus<n.m>.zip contains all of the components described above except for the optional third party component, which must be obtained separately. <n.m> refers to the version number of the package:

To install the EmailPlus package:

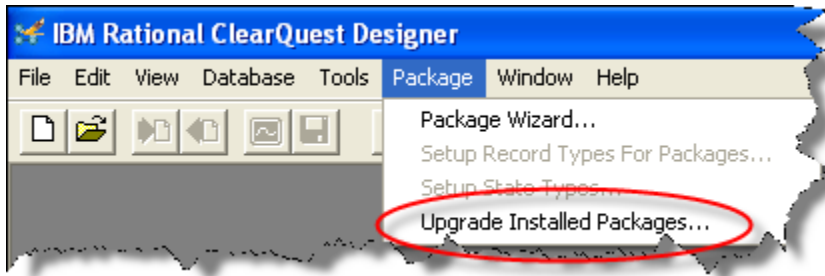
1. Unzip the Zip file – it contains these directories:
 - Package - Which contains all of the ClearQuest Package files
 - Scripts - Which contains the scripts to register the package
 - Relay - Which Contains the Mail relay application
 - Docs - Which contains this Installation Guide and the Administrator Guide.
2. Copy the **contents** of the Package directory to the appropriate location as shown in ??. If the directory into which ClearQuest has been installed is different from the directory specified in Table 1, then copy the Packages subdirectory to this directory instead.
3. If you installed ClearQuest in a nonstandard location, edit the batch file Scripts \RegisterPackage.bat to change the path to the package to reflect the install location on your machine.
4. Select and run the appropriate batch file for your version of ClearQuest / install location according to ??. Remember you may need to edit the script if you installed to a nonstandard location or drive. The scripts can be found in the Scripts subdirectory. You should see something like this when the script executes.

```
C:\> RegisterPackage.bat
+++ Registered version '1.0' of package 'EmailPlus' located in 'C:\Program Files
\Rational\ClearQuest\packages\EmailPlus\1.0'
```

The exact content will vary with the number of revisions of the package and the install path.

5. To complete the registration of the package with the ClearQuest Designer see the EmailPlus Administrator Guide Section 6.1.
6. Carefully read the Administrator Guide contained in the Docs directory **before** you do anything further with the package.
7. If you have not previously applied this package, apply the package to a copy of your schema as described in section 6 of the Administrator Guide in order to evaluate the package first.
8. If this is an update to an existing deployment of the package, use the upgrade installed packages feature of the Designer.

Note: If the schema to which you have applied the package does not show up or the package does not appear in the list of packages to be updated, you can upgrade it manually using the package wizard and selecting the new revision and schema to apply it to. You will need to click on **More Packages** to add the latest revision.



On completion of your successful evaluation repeat steps 1-4 on each machine where the ClearQuest Designer will be used to make schema changes or to upgrade databases.

Optionally install the EMP Relay application contained in the Relay folder. This can be delayed until a mail transport mode is selected. See the EmailPlus Administrator Guide for details.

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