

Rational Requisite[®] Pro Installation Guide

Version 4.5

Rational
unifying software teams

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Patent

U.S. Patent Nos. 5,193,180 and 5,335,344 and 5,535,329 and 5,835,701. Additional patents pending.

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1

Rational Software Installation Quick Start

Installation Overview

The Rational Software Setup program lets you perform standard and custom installations of Rational software products.

This document provides you with:

- An overview of the installation procedures for Rational software products, included in this chapter.
- Software licensing description and procedures. See “Licensing Overview” on page 21. The online help for Rational License Key Administrator contains detailed information about licensing activities.
- Information needed to perform a typical installation of Rational RequisitePro and RequisiteWeb. Online documentation is available in PDF. Adobe Acrobat Reader is required to view PDF files. The release notes are available in HTML; a Web browser is required for HTML documents.

A copy of the Adobe Acrobat Reader installation kit is available on the Rational Solutions for Windows CD in the [extras] directory. Rational Suite and other Rational products are on a separate Rational Solutions for Windows – Online Documentation CD.

- Support information, including references to additional sources of information for Rational software and licensing. See Table 13, Rational Customer Support Information, on page 101.

Installing Rational Software Products and License Keys

This section provides a summary of the steps for installing Rational software products and the FLEXlm license server software.

For each product that you install, refer to the installation chapter for information about prerequisites and additional installation procedures.

Note

This guide assumes drive C as your default installation drive. Substitute your actual installation drive name, as needed.

Installation Quick Start

Table 1, Installation Quick Start Guide, summarizes the steps for installing Rational software and license keys:

Table 1: Installation Quick Start Guide

Step	For More Information
Install Rational software from the Rational Solutions for Windows CD. Make certain that you are installing the product you have purchased.	See the chapter for the product you are installing for custom installation options and configuration procedures.
If you are using floating licenses: Install and configure the FLEXIm License Server software. The FLEXIm License Server software is on the Rational Solutions for Windows CD.	See "FLEXIm License Server Installation" on pag e39.
Use the Rational License Key Administrator to install the startup license key.	See the Rational License Key Administrator online help for detailed instructions. The information you need to install the startup license key is included on your Startup License Key Certificate in your media kit.
Request permanent license keys from Rational using the License Key Administrator. Make certain that you are requesting keys for the product you have purchased and installed.	See "Rational Software Client Licensing" on page 25, "Rational Software Server Licensing" on page 29, and the Rational License Key Administrator online help.
If you are using node-locked licenses: Install the new permanent license key on your client system. If you are using floating licenses: Install the new permanent license key on your license server system.	See the Rational License Key Administrator online help.
If you are using floating licenses: Set up your client systems to use the licenses from the license server system.	See the Rational License Key Administrator online help.
Use the Start menu to select and start the program.	See the program's online help.

Note Startup license key information is included with your Rational Suite software media kit. The startup license expiration date is noted on your startup license key certificate. For additional licensing information, see the Rational License Key Administrator online help.

Caution **Make certain that you select the product you purchased when you use the Rational Software Setup program. Review the License Key Certificate that you received with your purchase. If you install a program other than the one you purchased and for which you do not have a license key, you will not be able to use that program.**

Configuring RequisitePro and RequisiteWeb as an Administrator

As an administrator, you must set up the databases used with RequisitePro if your team is using an enterprise database (Oracle or SQL Server) for your project. For information about installing and configuring enterprise databases for use with RequisitePro, see “Enterprise Database Configuration” on page 9.

To install RequisiteWeb on your IIS server, refer to “Rational RequisiteWeb Installation and Configuration” on page 33.

2

Rational RequisitePro Installation and Database Configuration

This chapter describes how to use the Rational Software Setup wizard to install Rational RequisitePro, version 4.5. It also includes instructions on configuring Oracle® and Microsoft® SQL Server™ databases for RequisitePro projects.

RequisitePro organizes your software development requirements, linking Microsoft Word to a requirements repository that can be shared among other Rational products.

For the most current information related to RequisitePro features and known issues, refer to the Release Notes document that is, by default, at the following location on your system after installation:

```
c:\Program Files\Rational\RequisitePro 4.5\help\readme.html
```

Before You Start the RequisitePro Installation

The following sections provide you with steps you must take and information you must prepare prior to installing RequisitePro.

For more detail on the installation procedure, including an explanation of installation types, installing shared components, and accessing support, refer to the “Additional Installation Information” on page 67.

Installation Requirements

Note

Make certain that you have a current backup of your Registry and system directories prior to running the Rational Software Installation procedure.

You must install either a startup or permanent license key to use this software. The Rational License Key Administrator online help provides detailed instructions for installing startup and permanent license keys. See “Rational Software Client Licensing” on page 49 for more information about licenses, including the procedure for obtaining an updated license key.

The installation program requires specific versions of Microsoft files. The installation program will install them or you may choose to install them yourself from other sources.

To use the Rational Software Setup program on a Windows NT system, you must have Windows NT administrator privileges on the local machine.

Table 2: RequisitePro Requirements

Item	Requirement
Operating Systems	Windows NT 4.0, Service Pack 3 or greater Windows 95, Service Pack 2 or greater Windows 98
Database	Microsoft Access 97 Microsoft SQL Server 6.5 or 7.0 Oracle7 or Oracle8 server and client software -- (specifically, Oracle version 7.3.4 or greater)
Processor	133 MHz or greater
Memory	64 MB
Disk Space	55 MB
Word Processor	Microsoft Word 95, 97, or 2000
Requirement Metrics Reporting	Microsoft Excel 97 or 2000.
LAN Support	Any Windows-supported network

Installing RequisitePro with Rational Software Setup

Preparing to Install RequisitePro

The Rational Software Installation procedure uses `c:\Program Files\Rational` as the default installation path. You may specify another drive during the installation procedure.

Note If you have installed another Rational Suite product, you cannot select an alternate location for your RequisitePro installation.

Caution Canceling an installation that is in progress may leave your system in an indeterminate state. If you click **Cancel** while the installation is in progress, you are asked to confirm that you want to exit from the incomplete installation.

This section describes a Typical installation of RequisitePro. For a more detailed description of the installation procedure, see “Using the Rational Software Setup Program” on page 67.

- 1 Insert the Rational Windows Solutions CD into your system’s CD drive.

The setup program starts automatically.

If autorun is disabled on your system, click **Start → Run**. Using the drive letter of your CD-ROM drive, enter `drive:\SETUP.EXE`.

- 2 The Rational Software Setup wizard guides you through the software installation. On each page, click **Next** to proceed to the next page.

The Rational Software Setup program writes a log of the installation activities. The log file is located in

```
<Install Path>\Rational\RSSetup\RSSetup.log.
```

- 3 At the Choose Products page, select **Rational RequisitePro 4.5**.

- 4 If you are responsible for setting up an Oracle or SQL Server database for RequisitePro, select the **Custom/Full** installation option at the “Setup Configuration” screen and go to step 5. If not, select the **Typical** installation option and complete the installation.

- 5 At the screen “Choose Features,” select the **Oracle Setup** or **SQL Server Setup** options (under Rational RequisitePro 4.5) if you plan to use those databases for your RequisitePro projects.

If you select either option, the program will install schema creation scripts in one or both of the following default locations on your local machine:

```
c:\Program Files\Rational\RequisitePro 4.5\database\oracle  
c:\Program Files\Rational\RequisitePro 4.5\database\sqlserver
```

For more information on configuring Oracle or SQL Server for RequisitePro projects, refer to “Enterprise Database Configuration” on page 9.

For additional detail on the installation procedure, including an explanation of installation types, installing shared components, and accessing support, refer to the “Additional Installation Information” on page 67.

Possible Reboot Required

If files that are required for the installation are in use during the installation procedure, the Rational Windows Setup program may need to reboot your system to complete the installation. After rebooting, log on as the same user to complete the installation procedure.

Configuring E-mail for Discussions

Use the Rational E-mail Reader application to configure inbound and outbound e-mail for all discussion participants with a valid e-mail address in their RequisitePro user information. The Rational E-mail Reader application is included with your Rational Software installation at the following default location: c:\Program Files\Rational\common\mailreader.exe

This separate application offers full e-mail integration with RequisitePro by associating an e-mail handler with each RequisitePro project. Initial discussion items and replies are automatically stored in the RequisitePro database and sent to discussion participants via e-mail. Participants can reply to the discussion items using their e-mail, as well as from within RequisitePro.

Note

The E-mail Setup option on the RequisitePro Tools menu only configures outbound e-mail for users who initiate a discussion or reply to a discussion from within the RequisitePro Discussion dialog box. To allow users to reply to discussions via e-mail, and to enable discussion e-mail for RequisiteWeb users, configure an e-mail handler for each project using the Rational E-mail Reader.

Discussion E-mail Configuration Requirements

- You must configure a unique e-mail address for each RequisitePro project
- **For RequisiteWeb:** You must run the Rational E-mail Reader on a different server than the IIS server where RequisiteWeb is installed.
- **For RequisiteWeb:** In order to enable e-mail for RequisiteWeb discussions, you must configure discussion e-mail using the **SMTP** protocol option rather than MAPI protocol option in the Rational E-mail Reader.
- In order to complete the Rational E-mail Reader setup for SMTP protocol, you need the following information from your e-mail administrator:
 - SMTP Server name
 - POP3 Server name

- E-mail address; one for each RequisitePro project
- POP3 server login and password for the e-mail address

Note Refer to the online help in the Rational E-mail Reader for more information.

Removing RequisitePro

This section describes how to remove RequisitePro from your system.

Preparing to Remove RequisitePro

Make sure that no one is using RequisitePro and any associated files. You will not be able to remove files that are in use.

To remove RequisitePro from a Windows NT system, you must have Windows NT administrator privileges on the local machine.

To Remove RequisitePro

Use the **Add/Remove Programs** control panel to select and remove RequisitePro. The Rational Software Setup removes RequisitePro from your system.

Note Removing RequisitePro does not remove RequisitePro project data from your system.

Enterprise Database Configuration

The following sections describe the configuration of Oracle® and Microsoft® SQL Server™ databases for RequisitePro projects.

The use of client/server databases offers significantly increased power and expandability to your organization's implementation of Rational RequisitePro. RequisitePro provides the capability to use Oracle7 and Oracle8 and Microsoft SQL Server 6.5 and 7.0, as well as Microsoft Access databases. Project data currently in Access can be easily migrated to Oracle or SQL Server using the RequisitePro Database Type Conversion Wizard.

To create and access RequisitePro projects in Oracle or Microsoft SQL Server databases, you must configure an Oracle or SQL Server schema on your database server, and install RequisitePro on your client PC.

Database Setup

Refer to Oracle or Microsoft documentation for information on installing Oracle or Microsoft SQL Server. To configure an Oracle or SQL Server database for RequisitePro projects, refer to the sections “Configuring Oracle for RequisitePro” on page 10 and “Configuring SQL Server for RequisitePro” on page 22.

Client Installation

Access to RequisitePro projects on Oracle and SQL Server databases requires the installation of RequisitePro on the client PC. If you are using an Oracle database, you must also install the Oracle client software on your PC.

See the chapter “Rational RequisitePro Installation and Database Configuration” on page 5 for RequisitePro system requirements.

Installing Database Configuration Scripts

If you are responsible for setting up an Oracle or SQL Server database for RequisitePro, you should have installed the database configuration scripts with the **Custom/Full** installation option, described in “Installing RequisitePro with Rational Software Setup” on page 6.

If you selected the Oracle or SQL Server options, the program installed schema creation scripts in one or both of the following locations on your local machine:

```
c:\Program Files\Rational\RequisitePro 4.5\database\oracle  
c:\Program Files\Rational\RequisitePro 4.5\database\sqlserver
```

If you did not install the scripts during the installation process, you can copy them to your local machine from the `RequisitePro 4.5/database` directory on your installation media.

Configuring Oracle for RequisitePro

Purpose

This section provides information about configuring Rational RequisitePro for use with Oracle database server. It includes:

- database management information for setting up an Oracle schema to accommodate Requisite projects,

- instructions for accessing an Oracle host from the client PC using Oracle's SQL*Net or Net8 Easy Configuration tool, and
- a procedure for creating a Requisite project in the Oracle database.

These instructions are intended for use by Oracle database administrators, system administrators, and RequisitePro project managers.

For the most current information related to Oracle database configuration, refer to the “Oracle Database Configuration for RequisitePro” document that is, by default, at the following location on your system after installation:

`c:\Program Files\Rational\RequisitePro 4.5\help\OracleSetup.html`

Introduction

To create and access RequisitePro projects in the Oracle database, follow the instructions in this document for enabling your Oracle database compatibility. RequisitePro supports multiple projects within a single Oracle schema. Refer to the procedure in this document, “Creating a Project in Oracle” on page 19 for instructions on adding an Oracle database project within RequisitePro. Use the same schema name for each of your RequisitePro projects.

Prerequisites

This document assumes that you have Oracle, installed on your LAN and the Oracle client software installed on your PC. Refer to the Oracle documentation for all questions regarding that product.

The following installation and configuration tasks need to be accomplished prior to performing the RequisitePro/Oracle integration outlined in this document.

Oracle Database Administration

Prior to configuring your access to Oracle from RequisitePro, the database administrator needs to provide the following information:

- Oracle database server name (TCP/IP Host Name)
- Oracle database alias or service name
- Oracle schema name for storing RequisitePro projects (see procedure below)
- your user ID for logging on to the Oracle database
- your user password for logging on to the Oracle database

Platform Compatibility

RequisitePro database implementation is compatible with all Oracle-supported platforms.

Creating an Oracle Schema for RequisitePro

Oracle database administration allows the creation of multiple schemas within your Oracle database instance. **Use the scripts listed below to create a RequisitePro user and schema** within Oracle for storing your projects. The RequisitePro scripts are designed to initially allocate disk space for the various database tables and indexes that are used by RequisitePro, based on the following approximations:

- 25 projects
- 250 documents (10 per project)
- 125 document types (5 per project)
- 125 requirement types (5 per project)
- 1250 user defined attributes (10 per requirement type)
- 125 user groups (5 per project)
- 100 users
- 12,500 requirements (500 per project)
- 12,500 discussions (500 per project)

The scripts simply provide an initial size for the RequisitePro schema. They in no way imply any constraints on size or number of projects.

Extents are set to the same size as the initial allocations. They define additional table space that Oracle will allocate if the original allocation becomes insufficient.

As database administrator, you can customize the scripts to adjust the table space allocations for tables and indexes in order to accommodate your organization's intended use of RequisitePro. See the section “Editing Scripts” on page 14.

Schema Creation Scripts

The following scripts are used for creating a RequisitePro schema within your Oracle database. They can be run automatically by executing the main script, `CREATE_REQPRO`, as described in the procedure “Creating a Schema” on page 16, or you can run them individually as needed.

CREATE_REQPRO

Establishes a log which can be used to review the results of running the script and runs the other scripts, listed below.

TABLESPACE

Creates table spaces for data and indexes. Creates disk files to support these table spaces.

CREATE_USER

Creates the default RequisitePro user (REQPRO) and password (REQPRO) and connects to the database with that user ID.

TABLES

Creates tables for the RequisitePro database.

PRIMARY

Creates primary keys for each table in RequisitePro.

INDEXES

Creates indexes for the RequisitePro database.

FOREIGN

Creates foreign key relationships between tables.

FUNCTIONS

Creates user-defined functions used within RequisitePro.

SEQUENCE

Creates sequences and triggers for auto-sequencing the RqToRelationships and RqQueryCriteria tables.

PROCEDURES

Creates stored procedures used within RequisitePro.

DATA

Inserts data into the RqKeys and RqRequisite tables.

GRANT_ROLE

Creates a user role with access to the RequisitePro schema objects.

Copying the RequisitePro Scripts

If you did not install the Oracle database creation scripts as described in “Installing RequisitePro with Rational Software Setup” on page e6, you can repeat the Custom/Full installation procedure or copy the Oracle scripts from

the Rational Windows Solutions media in the following location:

```
CD-ROM:\\RequisitePro 4.5\database\Oracle\
```

After installation, the scripts are located, by default, at the following location on your local machine:

```
c:\Program Files\Rational\RequisitePro 4.5\database\oracle
```

Copy the scripts to a subdirectory on your Oracle database server. We suggest that you create a “sql” directory below the home directory on the server.

Editing Scripts

All modifications described below are made in the CREATE_REQPRO script, unless otherwise indicated.

Specifying the Path for the Schema Scripts

Edit the DEFINE PATH entry to indicate the full path of your RequisitePro installation where the .SQL scripts are located. The suggested path (from the “Copying...” procedure, above) is:

```
DEFINE PATH= "$HOME/sql/ "
```

Note

If your environment limits your path to a maximum 8-character name for directories, be sure to reflect this format in your entry.

Indicating Data and Index Files Directory

Edit the DEFINE ORACLE _DATA entry to indicate the path and directory where the data file for the data table space will be created:

```
DEFINE ORACLE_DATA=/ORACLE_DATA/
```

Edit the DEFINE ORACLE _INDEX entry to indicate the path and directory where the data file for the index table space will be created:

```
DEFINE ORACLE_INDEX=/ORACLE_INDEX/
```

Specifying a Temporary Tablespace

Edit the DEFINE TEMP entry in the CREATE_REQPRO script to assign temporary tablespace for storing temporary objects for the user’s operations.

```
DEFINE TEMP=TEMP
```

Make sure that the value for this entry is a valid, existing tablespace in your Oracle database. Some versions of Oracle use “TEMPORARY_DATA”

rather than “TEMP.” Your installation of Oracle may contain a custom name for the temporary tablespace.

Customizing Disk Space Allocation for Database Objects

The schema creation scripts are designed to allocate disk space for the various database tables and indexes that are used by RequisitePro.

If you anticipate a much larger or smaller requirement for your organization’s use of RequisitePro, you can customize the disk space allocation specified in the CREATE_REQPRO script to accommodate your projected capacity.

Edit the following sizing variables:

```
SMALL          = 10K
MEDIUM        = 100K
LARGE         = 1000K
REQS          = 6000K
REQHIST       = 75000K
```

Note

The last two variables, REQS and REQHIST, are used for the requirements (RqRequirements) and requirement history (RqRequirementHistory) tables, respectively.

Edit the DEFINE DATA_SIZE and DEFINE INDEX_SIZE entries to reflect the change in the total size of the database caused by your edits to the sizing variables.

Modifying the Limits of the VARCHAR2 Datatype

Oracle8 supports up to 4000 characters in the VARCHAR2 data type. The RequisitePro Oracle scripts set this data type to a maximum of 2000 characters to accommodate both Oracle7 and Oracle8 databases. To modify this limit for Oracle8 databases, you can edit table settings in the TABLES and DATA scripts.

In the TABLES script, all occurrences of 2000 in the following columns can be set to the new maximum value of 4000:

Table	Column
RQDOCUMENTHISTORY	VERSIONREASON
RQDOCUMENTS	VERSIONREASON
RQPROJECTHISTORY	VERSIONREASON
RQPROJECTS	VERSIONREASON
RQQUERYDEFINITIONS	QUERYSTRING
RQREQUIREMENTHISTORY	VERSIONREASON

RQREQUIREMENTS	REQUIREMENTTEXT
RQREQUIREMENTS	VERSIONREASON
RQUSERDEFINEDFIELDVALUES	FIELDVALUE

In the DATA script, all occurrences of 2000 in the following columns can be set to the new maximum value of 4000:

Table	Column
RQREQUISITE	REQUIREMENTTEXTSIZE
RQREQUISITE	FIELDVALUESIZE
RQREQUISITE	VERSIONREASONSIZE

Creating a Schema

The Oracle database administrator performs the following procedure to create a RequisitePro schema in Oracle:

- 1 Edit the CREATE_REQPRO script, as described above in the section “Editing Scripts” on page 14.
- 2 On the Oracle database server, log on to SQL*Plus with system administrator permissions.

Note

If you run SQL*Plus from a remote client, you need to edit the RequisitePro CREATE_USER script. Change the entry `connect &3/&4` to the following:

```
connect &3/&4@<target Oracle database server alias>
```

- 3 Run the CREATE_REQPRO script using the command:
@<setup directory>\CREATE_REQPRO

This script runs the schema creation scripts. A message appears upon successful completion of the schema creation. If errors occur, review the log CREATE_REQPRO.LOG.

User ID for Accessing Oracle Database

All RequisitePro projects should access the Oracle database using the same user ID, which was created during the schema creation process, described above. The initial user name and password created by the script is REQPRO/REQPRO.

Each user does not need a separate Oracle account because RequisitePro uses its own user and user group tables to control access to a project.

Using Multiple Projects within an Oracle Database

RequisitePro supports multiple projects within a single Oracle schema. Refer to the procedure “Creating a Project in Oracle” on page 19 for instructions on adding an Oracle database project within RequisitePro. Use the same schema name for each of your RequisitePro projects.

Connecting Projects Across Databases

Perform the following steps to enable cross-project traceability between projects in distributed Oracle databases. Refer to the following sections for details.

- Create a reference to the remote database instance.
- Create a database link to the remote database.
- Define database aliases or service names on each RequisitePro client.

Creating a reference to the remote database instance

In order to run trace to and trace from queries between projects in distributed Oracle databases, you need to define a reference in each database instance that refers to the remote database instances. Edit the `tnsnames.ora` file, located on the Oracle server, to define the name, host, port and protocol of the remote service.

The following example shows the syntax for defining the database instance “server02” as a remote database server to “server01” in the `tnsnames.ora` file:

```
Server02.world =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS =
        (COMMUNITY = tcp.world)
        (PROTOCOL = TCP)
        (Host = server02)
        (Port = 1521)))
    (CONNECT_DATA = (SID = ORCL)))
```

In similar fashion, the “server02” database instance needs an entry to define the remote “server01” database instance:

```
Server01.world =
  (DESCRIPTION =
    (ADDRESS_LIST =
```

```
(ADDRESS =
  (COMMUNITY = tcp.world)
  (PROTOCOL = TCP)
  (Host = server01)
  (Port = 1521))
(CONNECT_DATA = (SID = ORCL))
```

Note This feature was tested using TNSNAMES for service name resolution. Use of Oracle Names Server or any other name server mechanism will require different setup.

Creating a database link to the remote database

Next, create a database link to each remote database in each database instance using an SQL utility. The link should be defined under the user account which owns the RequisitePro schema. The following example shows the required syntax for linking to “server02” from “server01”:

```
CREATE DATABASE LINK server02.world
CONNECT TO reqpro IDENTIFIED BY reqpro
USING 'server02.world';
```

A similar statement should be executed on the server02 database instance in order to define a link to server01.

If the `db_name.db_domain` does not result in a unique name for each database for which a link is required, use the `@connection_qualifier` syntax to create a unique name.

This naming convention will work regardless of the setting of the `global_names` parameter in the `initorcl.ora` file.

Defining database aliases on each RequisitePro client

Define SQL*Net database aliases or Net8 service names (resulting in local `tnsnames.ora` file entries) on each RequisitePro client machine (or shared centrally on a network) for each database instance. The database alias or service name on the client **MUST** match the database link you defined in the previous step for RequisitePro cross-project traceability to function correctly.

For more information on configuring client PCs for use with a Rational RequisitePro Oracle database, refer to the following section.

Setting Up PCs for Oracle Access

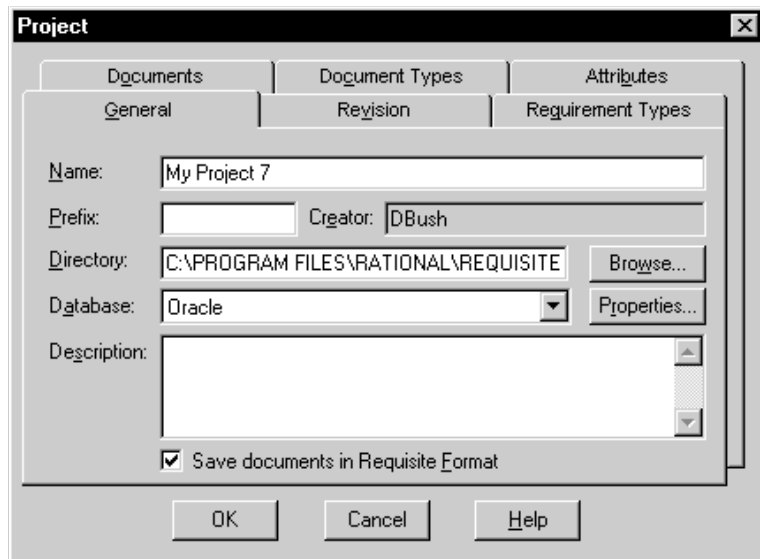
Configuring Your PC

Use the Oracle SQL*Net or Net8 Easy Configuration tool to configure access from your client PC to the Oracle database server.

Creating a Project in Oracle

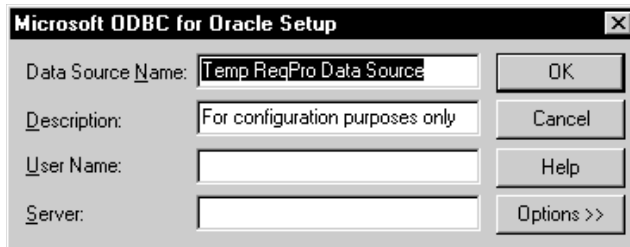
Perform the following steps to create a RequisitePro project that uses the Oracle database server for storing the RequisitePro project database.

- 1 Start RequisitePro.
- 2 On the **Project** menu, click **New**.
- 3 At the New Project dialog box, select the method **Blank project database**.
- 4 Click **OK**. The Project dialog box appears.



- 5 Perform all actions you would normally perform when creating a project; in addition, do the following.

- 6 In the Project dialog box General tab, select **Oracle** from the **Database** drop-down list.
- 7 Click the **Properties** button. The Database Properties dialog box appears.
- 8 Click the **Configure** button. The Microsoft ODBC for Oracle Setup dialog box appears.



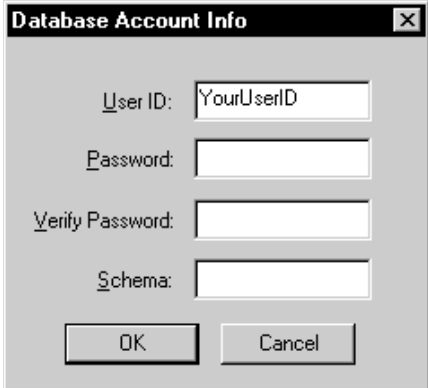
- 9 Do not modify the default entries in the **Data Source Name** and **Description** fields.
- 10 Type your **User Name** for logging into the Oracle database. This should be supplied to you by your Oracle database administrator.
- 11 For the **Server** field, type the alias or service name you created when configuring your PC for access to the Oracle database.

Note

This database alias or service name must be identical when configuring all PCs that will access the RequisitePro projects in the Oracle database.

- 12 Click **OK**.

- 13 On the Database Properties dialog box, click the **Account Info** button. The Database Account Info dialog box appears.



The screenshot shows a dialog box titled "Database Account Info". It contains the following fields and buttons:

- User ID:** A text box containing "YourUserID".
- Password:** An empty text box.
- Verify Password:** An empty text box.
- Schema:** An empty text box.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

- 14 Do not modify the User ID field.
- 15 Type your user password for logging into the Oracle server. This should be supplied to you by your Oracle database administrator.
- 16 Retype your password in the **Verify Password** field.
- 17 In the **Schema** field, type the name of the Oracle schema that your Oracle database administrator has established for storing RequisitePro data in Oracle.
- 18 Click **OK** to close the dialog box.
- 19 Click **OK** to close the Database Properties dialog.
- 20 Finish creating your project, then click **OK** to close the Project dialog box.

Archiving an Oracle Project

The RequisitePro archiving function is not supported in a RequisitePro Oracle database. In order to protect your work, you should back up the Oracle database and the project Word documents concurrently.

Configuring SQL Server for RequisitePro

Purpose

This section provides information about configuring Rational RequisitePro for use with Microsoft SQL Server. The section includes:

- database management information for setting up a SQL Server schema to accommodate RequisitePro projects, and
- a procedure for creating a RequisitePro project in the SQL Server database.

This document is intended for use by SQL Server database administrators, system administrators, and RequisitePro project managers.

For the most current information related to SQL Server database configuration, refer to the “SQL Server Database Configuration for RequisitePro” document that is, by default, at the following location on your system after installation:

```
c:\Program Files\Rational\RequisitePro 4.5\help\SQLsetup.html
```

Introduction

RequisitePro now offers the capability of using Microsoft SQL Server, as well as Microsoft Access, for your project database. The use of SQL Server offers significant power and expandability to your organization's implementation of RequisitePro.

This document assumes that you have SQL Server, Version 6.5 or 7.0, installed on your LAN. Refer to the SQL Server documentation for all questions regarding that product.

To create and access RequisitePro projects in the SQL Server database, follow the instructions in this section for enabling your SQL Server database compatibility. RequisitePro supports multiple projects within a single SQL Server schema. Refer to the procedure “Creating a Project in SQL Server” on page 27 for instructions on adding an SQL Server database project within RequisitePro. Use the same schema name for each of your RequisitePro projects.

Prerequisites

The following installation and configuration tasks need to be accomplished prior to performing the RequisitePro/SQL Server integration outlined in this document.

Required Software

- Rational RequisitePro 4.5
- Microsoft SQL Server database server, Version 6.5 or 7.0

SQL Server Database Administration

Prior to configuring your access to SQL Server from RequisitePro, the database administrator needs to establish the following items:

- SQL Server machine name (TCP/IP Host Name)
- SQL Server default database for RequisitePro projects, such as “RequisitePro”
- a user ID for logging on to the SQL Server database, such as “ReqPro”
- a user password for logging on to the SQL Server database, such as “reqpro”

See the following sections for instructions on configuring these items.

Platform Compatibility

RequisitePro database implementation is compatible with all Microsoft SQL Server-supported platforms.

Creating a SQL Server Database for RequisitePro

Use the following instructions to create a SQL Server database and schema for RequisitePro projects. The initial database size is based on the following approximations for your use of RequisitePro:

- 25 projects
- 250 documents (10 per project)
- 125 document types (5 per project)
- 125 requirement types (5 per project)
- 1250 user-defined attributes (10 per requirement type)
- 125 user groups (5 per project)

- 100 users
- 12,500 requirements (500 per project)
- 12,500 discussions (500 per project)

Creating a Database in SQL Server 6.5

To create a database in **SQL Server 6.5**, do the following:

- 1 Create a database device for the RequisitePro database.**
 - The recommended device name is “ReqProData.”
 - The ideal size of the device depends on the number of RequisitePro projects that will be stored in the database, as well as the number of requirements in those projects. The recommended size is 150 MB.
 - 2 Create a database device for the RequisitePro log file:**
 - The recommended device name is “ReqProLog.”
 - The recommended size for the log device is one third of the size of the database device, in this case, 50 MB.
 - 3 Create a database in the ReqProData device created in step 1:**
 - The recommended database name is “RequisitePro.”
- Note** If you use a different database name, you will need to modify the database configuration scripts to reflect the actual name.
- The recommended size is the same as the database device created in step 1, in this case, 150 MB.
 - Specify the ReqProLog device, created in step 2, as the log device for this database.

Creating a Database in SQL Server 7.0

To create a database in **SQL Server 7.0**, do the following:

- 1 Enter a name for the RequisitePro database. The database has an .MDF extension.**
 - The recommended database name is “RequisitePro.”

Note If you use a different database name, you will need to modify the database configuration scripts to reflect the actual name.

- 2 Set the initial size of the database to 150 MB.
- 3 Set the initial size of the transaction log file (.LDF) to one third the size of the database, in this case 50 MB.

Schema Creation Scripts

The scripts listed below are used for creating a RequisitePro schema within your SQL Server database.

Login and User.sql

Creates a default RequisitePro login and user. For more information refer to the section below, “Default Login and User.”

Defaults.sql

Creates default values used by various tables.

Tables and Indexes.sql

Creates the tables and indexes required by RequisitePro.

Triggers.sql

Creates triggers that enforce cascading deletes.

Initial Data.sql

Inserts data required by RequisitePro when it first runs.

Copying the RequisitePro Scripts

If you did not install the SQL Server database creation scripts as described in “Installing RequisitePro with Rational Software Setup” on page 6, you can repeat the Custom/Full installation procedure or copy the SQL Server scripts from the Rational Windows Solutions media in the following location:
CD-ROM: \\RequisitePro 4.5\database\SQLserver\

After installation, the scripts are located, by default, at the following location on your local machine:

```
c:\Program Files\Rational\RequisitePro 4.5\database\sqlserver
```

Copy the scripts to a subdirectory on your SQL Server database server. We suggest that you create a “sql” directory below the home directory on the server.

Running Schema Creation Scripts

The scripts listed below are used for creating a RequisitePro schema within your SQL Server database. Run the scripts in the sequence presented below.

- For **SQL Server 6.5**, run the scripts individually using the **iSQL_w** executable or the **SQL Query Tool** within the SQL Server Enterprise Manager. Be sure to select the RequisitePro database in the DB drop-down list when running the scripts
- For **SQL Server 7.0**, run the scripts individually using the **SQL Server Query Analyzer**. Be sure to select the RequisitePro database in the DB drop-down list when running the scripts.

- 1 login and user.sql
- 2 defaults.sql
- 3 tables and indexes.sql
- 4 triggers.sql
- 5 initial data.sql

Default Login and User

The schema creation scripts, described above, create default user information for accessing and creating projects in SQL Server. The user name also establishes the ownership and name of the schema (by default, “reqpro”). The default user permissions are required for use with RequisitePro.

Note

If you modify this script to use a different login and user name, you will need to modify subsequent scripts.

User	Login	Password
ReqPro	ReqPro	reqpro

The ReqPro user is assigned the following statement permissions in SQL Server:

User	Statement Permissions
ReqPro	Create Default, Create Procedure, Create Rule, Create Table, Create View

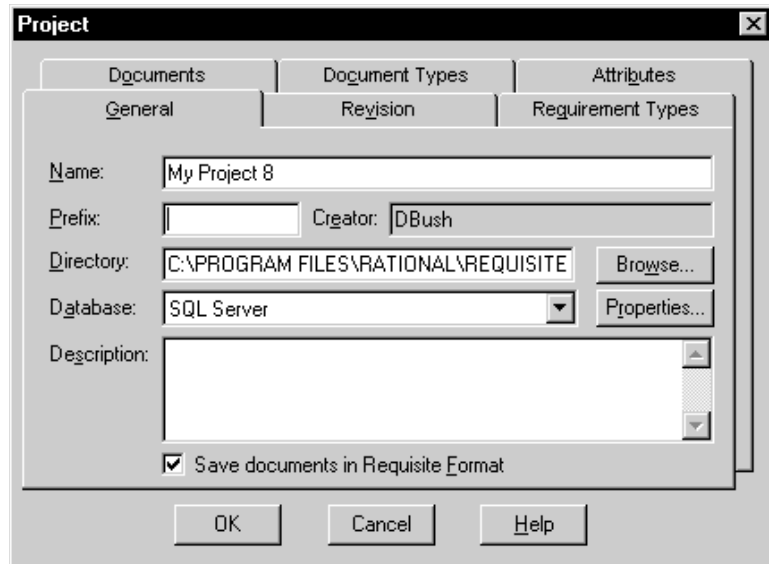
As the owner of the RequisitePro database objects, the ReqPro user is automatically assigned the following database permissions in SQL Server:

User	Database Permissions
ReqPro	Select, Insert, Update, Delete, DRI on all Tables and Views

Creating a Project in SQL Server

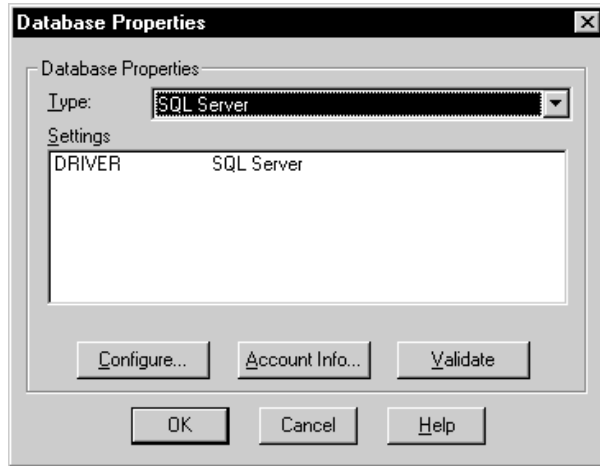
Perform the following steps to create a RequisitePro project that uses the SQL Server for the project database.

- 1 Start RequisitePro.
- 2 On the **Project** menu, click **New**.
- 3 At the New Project dialog box, select the method **Blank project database**.
- 4 Click **OK**. The Project dialog box appears.



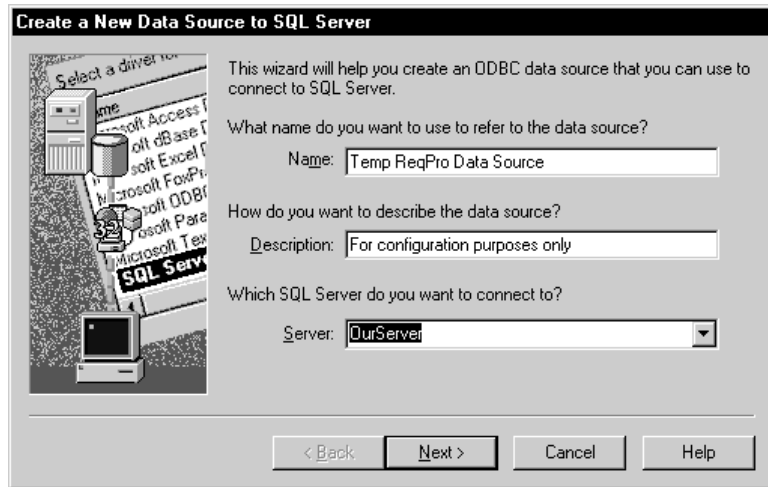
- 5 Perform all actions you would normally perform when creating a project; in addition, do the following.

- 6 In the Project dialog box General tab, select **SQL Server** from the **Database** drop-down list.
- 7 Click the **Properties** button. The Database Properties dialog box appears.



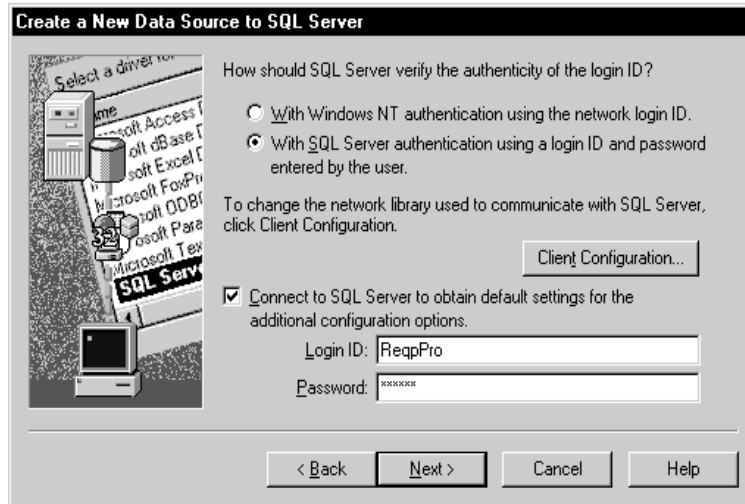
Configuring the Database

- 1 At the Database Properties dialog box, click the **Configure** button. The “Create a New Data Source to SQL Server” dialog box appears.



- 2 Do not modify the data source **Name** or **Description** fields
- 3 In the **Server** field, type the name of the SQL Server, supplied by your database administrator.

- 4 Click **Next**. The second data source screen appears.



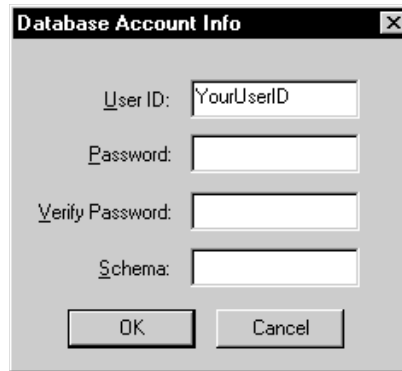
- 5 Select the option “**With SQL Server authentication using a login ID and password entered by the user.**”
- 6 Be sure the check box “**Connect to SQL Server to obtain default settings for the additional configuration options**” is checked.
- 7 Type a **login ID** and **password** supplied by your database administrator, such as “ReqPro” and “reqpro.”
- 8 Click **Next**.
- 9 Click the check box “**Change the default database to**” and select a database name supplied by your database administrator, such as “RequisitePro.”
- 10 Click **Next**.
- 11 Click **Next** to accept the default language, character, and regional settings. The use of log files, shown on the following screen, is optional.
- 12 Click **Finish**. The ODBC Microsoft SQL Server Setup dialog box appears.
- 13 Click the **Test Data Source** button. The SQL Server ODBC Data Source Test dialog box appears.

14 Click **OK**. The ODBC Microsoft SQL Server Setup dialog box appears.

15 Click **OK**. You return to the Database Properties dialog box.

Setting Up the Project Account Information

- 1 At the Database Properties dialog box, click the **Account Info** button. The “Database Account Info” dialog box appears.



The screenshot shows a dialog box titled "Database Account Info". It contains the following fields and controls:

- User ID:** A text box containing the text "YourUserID".
- Password:** An empty text box.
- Verify Password:** An empty text box.
- Schema:** An empty text box.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

- 2 Type the **user ID** and **password**, supplied by your database administrator for accessing the SQL Server database, such as “ReqPro” and “reqpro.”
- 3 Retype your password in the **Verify Password** field.
- 4 In the **schema** field, type the user name of the owner of the RequisitePro database tables, supplied by your database administrator, such as “ReqPro.”
- 5 Click **OK** to close the dialog box.
- 6 Click **OK** to close the Database Properties dialog.
- 7 Finish creating your project, then click **OK** to close the Project dialog box.

Archiving a SQL Server Project

The RequisitePro archiving function is not supported with a SQL Server database. In order to protect your work, you should back up the SQL Server database and the project Word documents concurrently.

3

Rational RequisiteWeb Installation and Configuration

Overview

This chapter describes the installation and configuration of Rational RequisiteWeb 4.5.

Rational RequisiteWeb allows clients to read and modify requirements information across the Internet or an Intranet. By utilizing browsers – Netscape Navigator or Microsoft Internet Explorer – RequisiteWeb provides platform-independent, thin-client access to RequisitePro project data.

RequisiteWeb requires the configuration of the Microsoft Internet Server and the installation of Web components on the same Microsoft Windows NT server. In addition, a Web browser must be installed on the client system. No Requisite application-specific files need to be installed on the client system.

For more information related to RequisiteWeb, including the most current installation, configuration, and known issues, refer to the RequisiteWeb Installation and Configuration document that is, by default, at the following location on the system where you install RequisiteWeb:

```
c:\Program Files\Rational\RequisitePro 4.5\reqweb\reqwebsetup.html
```

RequisiteWeb Server

Server Configuration Overview

The following sections provide system requirements, installation, and configuration information for installing RequisiteWeb on your NT server. This information is necessary for performing the following procedures:

- 1 Reviewing system requirements
- 2 Installing RequisiteWeb on your IIS server
- 3 Copying RequisiteWeb components on the IIS server
- 4 Creating a virtual Web directory

- 5 Configuring the ReqWeb site for Netscape Navigator access
- 6 Configuring the ReqWeb site for Netscape Navigator access from UNIX
- 7 Configuring RequisiteWeb for displaying documents (NTFS drives only)
- 8 Building a RequisitePro project catalog using a text editor
- 9 Configuring e-mail for RequisitePro discussions
- 10 Configuring RequisiteWeb for Oracle database projects

For more detail on the installation procedure, including an explanation of installation types, installing shared components, and accessing support, refer to the “Additional Installation Information” on page 67.

Reviewing Installation Requirements

Note Make certain that you have a current backup of your Registry and system directories prior to running the Rational Software Installation procedure.

You must install either a startup or permanent license key to use this software. The Rational License Key Administrator online help provides detailed instructions for installing startup and permanent license keys. See “Rational Software Client Licensing” on page 49 for more information about licenses, including the procedure for obtaining an updated license key.

To use the Rational Software Setup program on a Windows NT system, you must have windows NT administrator privileges.

Table 3 summarizes the requirements for the RequisiteWeb server.

Table 3: RequisiteWeb Server Requirements

Item	Requirement
Operating System	NT Server 4.0, Service Pack 3 or later NT 4.0 Option Pack which includes: Microsoft Internet Information Server (IIS) 4.0 and Microsoft Transaction Server (MTS) 2.0
Processor	200 MHz or greater
Memory	128 MB
Disk space	RequisiteWeb (includes system DLLs) -- 40 MB ASPs, Web DLLs, bitmaps -- 2 MB
Other products	Microsoft Word 97 or Word 2000; in Word 97, you must include the installation option: Converters and Filters/Text Converters/HTML Converter Oracle 7.3 or later client software (for accessing projects in an Oracle database)

Installing RequisiteWeb on the IIS Server

Note

For current RequisiteWeb users, be sure to uninstall any earlier version of RequisiteWeb prior to installing RequisiteWeb on your server. Refer to “Removing RequisiteWeb” on page e41 for specific instructions. Be sure to retain your existing `catalog.txt` file.

- 1 Insert the Rational Windows Solutions CD into your system’s CD drive.

The setup program starts automatically. If autorun is disabled on your system, click **Start → Run**. Using the drive letter of your CD-ROM drive, enter `drive:\SETUP.EXE`.

- 2 The Rational Software Setup wizard guides you through the software installation. On each screen, click the **Next** button to proceed to the next screen.

The Rational Software Setup program writes a log of the installation activities. The log file is located, by default, in

`c:\Program Files\Rational\RSSetup\RSSetup.log`

- 3 At the Choose Product screen, select **Rational RequisiteWeb 4.5** on the drop-down list.
- 4 At the Setup Configuration screen:
 - click **Typical** to install all required RequisiteWeb components, including the Learning Projects, which provide initial sample projects;
 - click **Custom/Full** or **Compact** to install RequisiteWeb without the Learning Projects.

Possible Reboot Required

If files that are required for the installation are in use during the installation procedure, the Rational Windows Setup program may need to reboot your system to complete the installation.

After rebooting, log on as the same user to complete the installation procedure.

Copying RequisiteWeb Components on the IIS Server

The IIS installation creates a `wwwroot` directory in the server file structure; typically this is located in the `C:\Inetpub` directory.

The RequisiteWeb installation creates a `ReqWeb` directory in the RequisitePro installation directory; typically located in: `C:\Program Files\Rational\RequisitePro 4.5`. Copy and paste this directory into the `wwwroot` directory using Windows NT Explorer.

- 1 Copy the `ReqWeb` directory located in `C:\Program Files\Rational\RequisitePro 4.5`. Be sure to include the `ReqWeb` directory and all its contents and subdirectories.
- 2 Paste the `ReqWeb` directory and all its contents in the `C:\Inetpub\wwwroot` directory on your IIS installation.

Creating a Virtual Web Directory

RequisiteWeb requires a virtual directory on your Web server in order to access the RequisiteWeb catalog and other components.

- 1** Launch Microsoft Management Console (MMC).
- Note** The default Start menu path for the MMC is Programs/Windows NT 4.0 Option Pack/Microsoft Internet Information Server/Internet Service Manager.
- 2** Navigate to the ReqWeb directory under the Default Web Site.
 - 3** Right-click on the ReqWeb directory and click **Properties**. The Properties dialog box appears.
 - 4** At the **(Virtual) Directory** tab, under **Access Permissions**, mark the **Read** check box and clear the **Write** check box. Clear all the **Content Control** check boxes.
 - 5** Under Application Settings, click the **Create** button to create a virtual Web directory.
- Note:** If the Remove button is displayed instead of the Create button, click it. The Create button appears.
- 6** Mark the check box **Run in separate memory space (isolated process)**.
 - 7** Under the Application Settings **Permissions**, select the **Script** option.
 - 8** In the **Name** field, type ReqWeb.
 - 9** Click the **Configuration** button. The Application Configuration dialog box appears.
 - 10** Click the **App Options** tab. Be sure that the **Enable session state** check box is marked.
 - 11** Be sure that the **ASP script timeout** field is set to at least 90. Click **OK** to return to the Properties dialog box.
 - 12** On the **Directory Security** tab in the **Anonymous Access and Authentication Control** frame, click the **Edit** button to access to display Authentication Methods dialog box.
 - 13** Mark the **Allow Anonymous Access** check box and clear the **Basic Authentication** and **NT Challenge/Response** check boxes. Click

the **Edit** button next to the **Account Used for Anonymous Access** label. The Anonymous User Account dialog box appears.

- 14 At the **Username** field, note the IUSR user name. It should be in the form IUSR_<server name>. You will use this user name in subsequent configuration steps.

Note: If you change the name of the default IIS user name in the Anonymous User Account dialog box, be sure to specify that name at each occurrence of the “IUSR_<server name>” user in this document.

- 15 Click on the **Documents** tab and be sure the **Enable Default Document** check box is selected. If `default.asp` is not on the Default Document list, click **Add** and type `Default.asp` and click **OK**. If `Default.asp` is not at the top of the Default Document list, select it and click the up arrow. Click **OK**.

Configuring for Navigator Access

If any of your RequisiteWeb users will access the interface using Netscape Navigator on any operating system, perform the following procedure:

- 1 Launch Microsoft Management Console (**MMC**) on the IIS server.
- 2 In MMC, click the `ReqWeb` site, and select **Properties**.
- 3 In the Properties dialog box, select the **HTTP Headers** tab.
- 4 Click the **Add** button. The Add/Edit Custom HTTP Header dialog box appears.
- 5 In the **Custom Header Name** text box, type `LAST-MODIFIED`.
- 6 In the **Custom Header Value** text box, type the following date and time: `07/08/1999 10:10:10 AM -0700 GMT`
- 7 Click **OK**. Click **OK** again to close the ReqWeb Properties dialog box. No reboot is required to apply the changes.

Configuring for UNIX Navigator Access

Note: When configuring RequisiteWeb for use with UNIX Navigator, be sure to perform the procedure outlined in "Configuring for Navigator Access", above, as well as the following procedure.

If any of your RequisiteWeb users will access RequisiteWeb through the UNIX version of Netscape Navigator, you must use Microsoft Management Console (MMC) to disable the HTTP Keep-Alives setting for the RequisiteWeb default Web site.

- 1 Log on to the RequisiteWeb server.
- 2 Open **MMC**. This option is located on the Start/Programs menu at Windows NT 4.0 Option Pack/Microsoft Internet Information Server/Internet Service Manager.
- 3 In the left pane of the MMC display, right-click on the `Default Web Site` virtual directory and click **Properties**. The Properties dialog box appears.
- 4 Click the **Performance** tab.
- 5 Clear the check box **HTTP Keep-Alives Enabled** in the Connection Configuration frame.
- 6 Click **OK** to close the Properties dialog box.

Configuring RequisiteWeb for Displaying Documents (NTFS drives only)

In order to dynamically display RequisitePro documents, RequisiteWeb creates temporary directories that contain copies of the project documents on the IIS server. By default, the anonymous IIS user (`IUSR_<server name>`) does not have permission to create directories in the `ReqWeb` virtual directory. Therefore, you must create the `GenDoc` directory that will contain the temporary directories for the documents. In addition, you must grant the `IUSR_<server name>` user permissions to create, change, and delete subdirectories and files within that `GenDoc` directory.

Note: Because FAT drives do not limit access by the default IIS user, you do not need to configure security access. If the Security tab is not present on the directory properties dialog box, the drive is configured as a FAT drive. In this case, skip this procedure.

- 1 In NT Explorer, navigate to the `Inetpub\wwwroot\ReqWeb` directory on your IIS installation. (You created this directory in the procedure “Copying RequisiteWeb Components on the IIS Server” on page 36.)
- 2 Create a new folder in the `ReqWeb` directory named `GenDoc`.

- 3 Right-click on the new GenDoc directory and select **Properties**.
- 4 Click the **Security** tab, then the **Permissions** button. The Directory Permissions dialog box appears.
- 5 Mark the **Replace permissions on subdirectories** check box.
- 6 Click the **Add** button. The Add Users and Groups dialog box appears.
- 7 Click the **Show Users** button. Find and highlight the IUSR_<server name> user, then click the **Add** button.
- 8 In the Type of Access field, select **Change** then click the **OK** button to close the Add Users and Groups dialog box. At the Directory Permissions dialog box, you should see the IUSR_<servername> user with Change access rights listed.
- 9 Click **OK** to close the dialog box and complete the NT permissions change.

Building the Web Project Catalog

Before projects are available for the RequisiteWeb clients, they must be cataloged on the RequisiteWeb server. The default catalog file contains entries for the two Learning Projects.

- 1 Using a text editor, open the `catalog.txt` file in the `C:\Inetpub\wwwroot\ReqWeb` directory.
- 2 Type the full path and RequisitePro project file name (*.rqs).
- 3 Enter additional project files on successive lines of the text file.
- 4 Save and close the file.

Note:

You must use full UNC paths to RQS files in Oracle and SQL Server-based projects that are not located on the IIS server.

Accessing Projects from the RequisiteWeb Server

If you are using Microsoft Access for your RequisitePro project database, the project files must be located on the IIS server in order for RequisiteWeb to access the project.

RequisiteWeb can open SQL Server- and Oracle-based projects which are not physically located on the IIS server. However, to open these projects, the

RequisiteWeb IUSR_<servername> user must have “change” rights to the directory containing the RequisitePro RQS project file on the machine where that file is located. To grant these rights, add the IUSR_<servername> user to the list of users with rights to that directory. Give the user a minimum of “change” level rights. Alternately, you may add the IUSR_<servername> user to a group who already has “change” rights (or greater) for that directory.

Configuring E-mail for Discussions

To configure e-mail for RequisitePro discussions, refer to “Configuring E-mail for Discussions” on page 8 in this guide. You use the same Rational E-mail Reader session for both RequisitePro and RequisiteWeb; however, note the following requirements when configuring the Rational E-mail Reader for both RequisitePro and RequisiteWeb:

- You must run the Rational E-mail Reader on a **different** server than the IIS server.
- In order to enable e-mail for RequisiteWeb discussions, you must configure discussion e-mail using the **SMTP** protocol option rather than MAPI protocol option in the Rational E-mail Reader.
- The E-mail Setup option on the RequisitePro Tools menu **does not** configure e-mail for RequisiteWeb discussions. Use the Rational E-mail Reader, as described on page 8, to configure e-mail for RequisiteWeb discussions.

Configuring RequisiteWeb for Oracle Database Projects

In order to access RequisitePro projects that are stored in an Oracle database using RequisiteWeb, you must configure Oracle client software on the IIS server. Refer to the section “Setting Up PCs for Oracle Access” on page 19 in this guide. That section refers to installation on a client PC; you must perform that procedure on the IIS server.

Removing RequisiteWeb

This section describes how to remove RequisiteWeb from your system.

Note

RequisiteWeb 4.0 SR1 required the use of Distributed COM (DCOM) for managing Microsoft Word documents on the IIS server. The current release no longer requires DCOM. If you created an "Admin" user for use with DCOM and Microsoft Word, you should reset the launching user for Word.

Run `dcomcnfg` at the **Start/Run** command line. Select **Microsoft Word Basic** and click **Properties**. At the **Identity** tab, select **The launching user** and click **OK**. At the Distributed COM dialog box, select **Microsoft Word Document** and repeat this change on the **Identity** tab.

Preparing to Remove RequisiteWeb

Prior to removing RequisiteWeb from your system, make sure that no one is using RequisiteWeb or any associated files. You will not be able to remove files that are in use.

RequisiteWeb installs a new project catalog containing paths to new sample projects. Be sure to make a copy of your existing `catalog.txt` file before removing RequisiteWeb. Add your previous `catalog.txt` entries to the new catalog file that is installed with the new version of RequisiteWeb. For more information, see “Building the Web Project Catalog” on page 40.

To remove RequisiteWeb from the Windows NT system, you must have Windows NT administrator privileges on that machine.

Stop the IIS Web Site Processes

- 1 Launch Microsoft Management Console (MMC).

Note

The default Start menu path for the MMC is Programs/Windows NT 4.0 Option Pack/Microsoft Internet Information Server/Internet Service Manager.

- 2 Select the `Default Web Site`.
- 3 Click the **Stop** button on the toolbar.
- 4 Right-click on the `ReqWeb` virtual directory and select **Properties**. The `ReqWeb Properties` dialog box appears.
- 5 Click **Remove**.
- 6 Click **OK** to close the dialog box.

Unload RequisiteWeb Components from Memory

- 1 At the Start/Run command line, type `cmd`.
- 2 In the MS-DOS window, type the commands indicated in the following steps. Answer OK to any messages. The `C:\` prompt appears after each command is successfully executed.
- 3 Type `net stop iisadmin /y` and press Enter.
The following message appears: "The IIS Admin Service was stopped successfully."
- 4 Type `mtxstop` and press Enter.
The following message appears: "Mtxstop: Stopping all application server processes..."
- 5 Type `net start w3svc` and press Enter.
The following message appears: "The World Wide Web Publishing Service was started successfully."
- 6 Close the MS-DOS window.

To Remove RequisiteWeb

Use the **Add/Remove Programs** function in the Windows NT Control Panel to select and remove RequisiteWeb. After the uninstall process is complete, check to see if the `ReqWeb` directory is still present on the server. If so, delete the `ReqWeb` directory and its subdirectories.

RequisiteWeb Client

Browser Requirements

To access RequisiteWeb from client machines, you must install one of the following Web browsers on the client system. No additional client installation is required for use of RequisiteWeb.

- Microsoft Internet Explorer 4 or 5
- Netscape Navigator 4 (Win 95/98/NT)
- Netscape Navigator 4 (UNIX)

4

Licensing Overview

This chapter provides an overview of the Rational software licensing, including descriptions of the types of licenses and license keys used with Rational software products.

“Installation Quick Start” on page 2 provides a summary of the steps associated with installing and setting up license keys with Rational software products.

The online help in the Rational License Key Administrator describes how to use the Rational License Key Administrator to review and modify your license configuration. The online help also provides information about configuring the FLEXlm License Server software.

The Rational License Key Administrator online help is available by clicking **Help** in the License Key Administrator program or by opening `<Install Path>\Rational\Common\licadmin.hlp`.

The Rational Software Licensing Model

Rational Software uses FLEXlm, a software-based license management tool from GLOBETrotter, Inc. FLEXlm provides users with a powerful and flexible mechanism for managing licensing resources.

For more information about FLEXlm licensing, see the FLEXlm for Windows FAQ file on www.globetrotter.com/lmwfaq.htm.

The Rational Software installation procedure automatically installs the FLEXlm licensing software on client systems, allowing client systems to use either node-locked or floating licenses. (Table 5, “License Types,” on page 47 describes node-locked and floating licenses.)

Most end users configure their own systems for licensing using software provided by Rational. In cases where customers choose to use floating licenses, a system administrator typically configures a license server system for licensing, using software provided by Rational and GLOBETrotter.

For additional information about Rational software licensing, see “Rational Software Client Licensing” on page 49 and “Rational Software Server Licensing” on page 53.

License Types and License Key Types

Table 4 describes the types of license keys used by Rational licensing. Table 5, “License Types,” on page 47 describes the types of licenses supported by Rational licensing. The Glossary on page 75 contains definitions of the terms in this table, along with other licensing terms.

Table 4: License Key Types

License Key Type	Description	Notes
Startup	A time-limited license.	The expiration date for the startup license keys is noted on the startup license key certificate included with your software media kit. You can use a startup license key on any system.
Permanent	A license issued to a customer for running Rational products. Permanent licenses are keyed to a product and machine. Permanent Keys can be node-locked or floating. Node-locked Permanent Keys are installed on a client machine, and floating Permanent Keys are installed on a License Server machine.	The Rational issues Permanent Keys upon request. Use the Rational License Key Administrator to prepare and send your license requests to Rational.
TLA (Term License Agreement)	Variations of a Permanent Key. TLAs are issued to a site to allow their employees to use Rational software for a negotiated period of time.	TLAs are issued by the Rational Sales Team. If you are interested in obtaining TLAs for your organization, contact your local Rational Sales Team

Table 5: License Types

License Type	Description	Notes
Node-locked	<p>A license that permits a user to use the licensed software on a specified system.</p> <p>A node-locked license is configured for a specific system. To move a node-locked license to another system, you must uninstall the license key from the old system and request a new license key for the new system.</p>	<p>Use the Rational License Key Administrator to add or modify a node-locked license.</p> <p>Contact Rational Support for help with node-locked licenses.</p>
Floating	<p>A floating license is installed on a license server system and permits a specified number of users to use the licensed software from client systems.</p> <p>Floating licenses are shared among all users of the licensed software.</p>	<p>A system administrator must install the FLEXlm License Server software on a server to set up floating licenses.</p> <p>Use Rational License Key Administrator to set up floating licenses for your system.</p> <p>See "FLEXlm License Server Installation" on page63.</p>

5

Rational Software Client Licensing

This chapter describes the following topics related to Rational software licensing services:

- Installing and configuring Rational Software node-locked license keys on a client system
- Installing or changing license keys after installing Rational software

If your system administrator has configured your license keys on your system, you can immediately start using your Rational software product.

Rational supports both node-locked and floating licenses. Node-locked licenses are restricted to an individual system. Floating licenses can be shared by multiple users, with one person using a license at a time.

The online help in the Rational License Key Administrator describes how to use the Rational License Key Administrator to review and modify your license configuration.

The Rational License Key Administrator online help is available by clicking **Help** in the License Key Administrator program or by opening `<Install Path>\Rational\Common\licadmin.hlp`.

Installing a Startup License on a Client System

After you install Rational software, you may install a startup license, allowing you to use Rational software until you obtain your permanent license key. The startup license key information is included with your software kit. The license key expiration date is noted on the startup license key certificate.

You can request permanent licenses keys, if available. The date that your permanent license key is available is noted on your startup license key certificate. You can request the permanent key as soon as it is available, whether you have installed a startup key or not.

In order to maintain uninterrupted use of your software, make sure you obtain and install your permanent license key before your startup license key expires.

To Install a Startup License Key on a Client System

- 1 Using your product's Windows Start menu, find and run the License Key Administrator. The Rational License Key Administrator is located in the program group for the program you have installed (for example, RequisitePro or Rational Suite Enterprise).
- 2 On the **License Key(s)** tab, click on **Enter a License Key**.
- 3 On the first wizard page, select **Startup License Key**.
- 4 On the second wizard page, select **Node-Locked License Key**.
- 5 On the wizard screen, provide the information in the fields based on the columns on the Startup License Key Certificate.

You must enter the information exactly as presented or the key will not work. If you enter incorrect or incomplete information, the License Key Administrator reports the following message:

```
There is an error in the license key as it was entered.  
Please check your entries for a possible typo.
```

Review and correct the information in each of the fields.

- 6 Click **Finish**.

After you complete this step, the License Key Administrator displays the startup license key on the **License Key(s)** tab.

Configuring Your Client System to Use a Node-Locked License

If you are using a node-locked license, you do not need to set up or connect to a license server system; you simply install your license keys on your client system. The Rational License Key Administrator online help describes the license installation process.

Configuring Your Client System to Use a Floating License

Before configuring your system to use a floating license, you must obtain the name of your license server system from your system administrator. (If you are the system administrator, see "Rational Software Server Licensing" on page 53 for information about setting up server-based floating licenses.)

- 1 Ensure that the FLEXlm license server software is running on the license server system. Contact your system administrator or see “Installing Rational License Server Software” on page 54.
- 2 Start the Rational License Key Administrator on the client system.
- 3 Click the **Settings** tab.
- 4 Select the **Search Server** check box and specify the name of the FLEXlm license server system.
- 5 Click **Exit** to exit from the Rational License Key Administrator.

Acquiring a Node-Locked Permanent Key for Your Client System

This section summarizes the steps you follow to submit your request.

The Rational License Key Administrator online help provides instructions for preparing, sending, and receiving license key requests, and installing license key files.

You must have an Internet connection to request license keys electronically with the Rational License Key Administrator.

- 1 Use the License Key Administrator to prepare the license request.
- 2 Send the request to Rational. You may send the request to Rational electronically using the Rational License Key Administrator, by printing and faxing the request, or by printing the request and making your request by telephone.

Notes

Review the Rational License Key Administrator online help before requesting permanent licenses. The online help describes the steps for any additional tasks. For example, the online help describes the steps needed to prepare license key requests for multiple systems and submitting those requests from a different system.

Make sure that the contact and account information is correct. The Rational License Key Administrator will identify any fields that are missing required information.

See “Support Information” on page 72 for contact information regarding licensing questions.

If you request a new license electronically, Rational will send you a license key via e-mail. If you request a license by fax and have specified an e-mail address in your contact information, you will receive a license key file via e-mail.

If your system is not connected to the Internet, you can request license keys from another system with an Internet connect. See the License Key Administrator online Help for details about requesting license keys via proxy.

6

Rational Software Server Licensing

This chapter describes the following topics related to Rational software licensing services:

- Installing Rational Software license management software.
- Installing and configuring license keys on a server system.
- Installing or changing license keys after installing Rational software.
- Special procedures and restrictions.

The information in this chapter is intended for system administrators or users who manage licenses.

If you are using node-locked licenses on a client system, you can skip this chapter. See “Rational Software Client Licensing” on page 49 for information about setting up node-locked licenses on a client system.

The online help in the Rational License Key Administrator describes how to use the Rational License Key Administrator to review and modify your license configuration. The online help also provides information about configuring the FLEXlm License Server software.

The Rational License Key Administrator online help is available by clicking **Help** in the License Key Administrator program or by opening `<Install Path>\Rational\Common\licadmin.hlp`.

Four steps are required to use floating licenses. These steps are described in the following sections:

- 1 Install the FLEXlm License Server software on the license server system. See FLEXlm License Server Installation on page 63 for additional information.
- 2 Configure the license server software.
- 3 Install the floating license keys on the license server system.
- 4 Configure the client to use license keys from the server.

Installing Rational License Server Software

The chapter FLEXlm License Server Installation on page 63, describes the installation procedure for the FLEXlm license server software

Configuring the License Server Software

After installing the FLEXlm License Server software, you must provide the following additional information about your configuration. You can use the FLEXlm License Manager to configure:

- Location of the license key file. (Rational recommends that you keep a copy of the license in the location where the application expects it.)
- Location of licensing executables.
- Location of log files. The debug log files can be used to diagnose configuration problems and daemon software errors.

To Configure the License Server Software

Use the following steps to configure your FLEXlm License Server software:

- 1 Click **Start** and choose **Settings→Control Panel**.
- 2 Open the **FLEXlm License Manager** control panel.
- 3 Click the **Setup** tab. Enter the location of the `lmgrd.exe` file. The default location is
<Install Path>\Program Files\Rational\Common\
4 Enter the location of the license key file on your licenser server computer. Specify either `rational_server_perm.dat`, the permanent license key file, or `rational_server_temp.dat`, the startup license key file. The default location is
<Install Path>\Program Files\Rational\Common\
5 Enter the location of the license debug log file. The default location is
<Install Path>\Program Files\Rational\Common\
6 Select the **Use NT Services** check box if you want to start the FLEXlm License Server software as a Windows NT service.

If you select the **Use NT Services** check box, you may also select the **Start Server at Power Up** check box. If you do not select the **Start**

Server at Power Up check box, you must start the FLEXlm License Server manually each time you start your computer.

We recommend that you select both check boxes to start your license server as a Windows NT service automatically each time you boot your system.

To start the FLEXlm License Server manually, on the **Control** tab of the FLEXlm License Manager control panel, click the **Start** button.

- 7 Click **OK** to save this information and exit.

To Start the FLEXlm License Server Software

We recommend that you reboot your system before starting the FLEXlm License Server software for the first time.

- 1 Open the **FLEXlm License Manager** control panel.
- 2 On the **Control** tab, click the **Start** button to start the license server.
- 3 Click the **Status** button to confirm that the license server started.

Installing a Startup License Key on a Server System

You may install startup license keys, letting client systems use floating licenses from the server to use Rational software until you get your permanent license keys.

You can request permanent license keys, if available. Your startup license key certificate indicates the date that your permanent license key is available. You may request the permanent key as soon as it is available, whether you have installed a startup key or not.

Review the information on Startup License Key Certificate, included with your software media kit. Your startup license key certificate indicates the startup license key expiration date.

To Install a Startup License Key on a Server System

- 1 From the Windows **Start** menu, select **Rational**→**License Key Administrator**.
- 2 On the **License Key(s)** tab, click the **Enter a License Key** button.

- 3 On the first wizard page, select **Startup License Key**.
- 4 On the next wizard page, select **Floating License Key**.
- 5 On the third wizard page, provide the information in the fields, based on the columns on the startup license key certificate. You must enter the information exactly as presented or the key will not work.
- 6 Click **Finish**.

After you complete this step, the License Key Administrator creates a file containing a startup license and displays the startup license key on the **License Key(s)** tab.

Acquiring Permanent Floating License Keys for Your Server System

You can use the Rational License Administrator to request changes to your license key configuration. For example, you can move license keys from one server to another or specify a new license contact.

The Rational License Key Administrator online help provides instructions for preparing, sending, and receiving license key requests, and installing license key files.

You must have an Internet connection to request license keys electronically with the Rational License Key Administrator.

- 1 Use the License Key Administrator to prepare the license request.
- 2 Send the request to Rational. You may send the request to Rational electronically using the Rational License Key Administrator, by printing and faxing the request, or by printing the request and making your request by telephone.

Notes

Review the Rational License Key Administrator online help before requesting permanent licenses. The online help describes the steps for any additional tasks. For example, the online help describes the steps needed to prepare license key requests for multiple systems and submitting those requests from a different system.

Make sure that the contact and account information is correct. The Rational License Key Administrator will identify any fields that are missing required information.

See Table 10, “Rational Licensing Support,” on page 73 for contact information regarding licensing questions.

If you request a new license electronically, Rational will send you a license key via e-mail. If you request a license by fax and have specified an e-mail address in your contact information, you will receive a license key file via e-mail.

If your system is not connected to the Internet, you can request license keys from another system with an Internet connect. See the License Key Administrator online Help for details about requesting license keys via proxy.

Redundant License Server Systems

You can configure your licensing environment to use up to three license server systems to ensure availability of license keys.

See the License Key Administrator online Help for information about setting up redundant license servers.

FLEXlm License Server

The following sections provide information about the FLEXlm License Server, including descriptions of the license daemons running on the server systems.

FLEXlm Components

The FLEXlm license configuration includes these major components, which are described in the following sections:

- License manager daemon
- Vendor daemon
- License key file
- Application program

License Manager Daemon (lmgrd)

The *license manager daemon* (`lmgrd`) handles the initial contact with the client application programs, passing the connection on to the appropriate vendor daemon. It also starts, stops, and restarts the vendor daemons.

Vendor Daemon

In FLEXlm, licenses are granted by running processes. There is one process for each vendor who has a FLEXlm-licensed product on the network. This process is called the *vendor daemon*. The vendor daemon keeps track of how many licenses are checked out, and who has them. If the vendor daemon terminates for any reason, all users lose their licenses. (This does not mean the applications suddenly stop running. Users can save their work and exit safely.) Users normally regain their license automatically when *lmgrd* restarts the vendor daemon, although the applications may exit if the vendor daemon remains unavailable.

Client programs communicate with the vendor daemon, usually through TCP/IP network communications. The client application and the daemon processes (the license server) can run on separate nodes on your network, across any size wide-area network. Also, the format of the traffic between the client and the vendor daemon is machine-independent, allowing for heterogeneous networks. This means the license server and the computer running an application can be different hardware platforms or even different operating systems (for example, Windows NT as a server system and Windows 95 as a client).

License Key File

Licensing data is stored in a text file called the *license key file*. The license key file is created by the software vendor and is edited and installed by the license key administrator. It contains information about the server nodes and vendor daemons, and at least one line of data (called FEATURE or INCREMENT lines) for each licensed product. Each FEATURE line contains a license key based on the data in that line, the *hostids* specified in the SERVER lines, and other vendor-specific data.

In some environments, you can combine the licensing information for several vendors into a single license key file. The FLEXlm default location is:

```
<Install Path>\license.dat (Windows, Windows/NT  
/usr/local/flexlm/licenses/license.dat (Unix)
```

See Table , “License Key Files,” on page 60 for details about the files used by Rational.

If your site has software from multiple vendors with incompatible license key files (due to different sets of servers), you should manage these activities with multiple server processes. See “Multiple License Server Processes” on

page 115 for details about setting up multiple server processes on your license server system.

You will not typically need to set the `LM_LICENSE_FILE` variable in order to use Rational software products. We strongly recommend that you keep a copy of the license key file in the vendor's 'default' location, so that users do not need to set `LM_LICENSE_FILE` to run their applications.

The `LM_LICENSE_FILE` variable is used on UNIX systems and on systems with multiple license key files. On Windows systems, set the variable `LM_LICENSE_FILE` in the **Environment** tab of the **System** control panel.

Application Program

The application program using FLEXlm is linked with the program module (called the FLEXlm client library) that provides communication with the license server. On Windows, this module is called `LMGRxxx.DLL`, where `xxx` indicates the FLEXlm version. During execution, the application program communicates with the vendor daemon to request a license.

License Activation Process

When you run a 'counted' FLEXlm-licensed application, such as a Rational Suite product that uses a floating license, the following occurs:

- 1** The license module in the client application finds the license key file, which includes the host name of the license server node and port number of the license manager daemon, `lmgrd`.
- 2** The client establishes a connection with the license manager daemon (`lmgrd`) and specifies the appropriate vendor daemon.
- 3** `lmgrd` determines which machine and port correspond to the master vendor daemon and returns that information to the client.
- 4** The client establishes a connection with the specified vendor daemon and sends its license request.
- 5** The vendor daemon checks in its memory to see if any licenses are available and sends a grant or denial back to the client.
- 6** The license module in the application grants or denies use of the feature, as appropriate.

'Uncounted' features, where the number of licenses is '0' (zero), do not require a server and the FLEXlm client library routines in the application grant or deny usage based solely upon the license contents. Node-locked licenses, for example, set the license number to 0 (zero).

License Key Files

As a system administrator, you must be aware of the files used by Rational software licensing. You will need access to them only when you are making changes to your license configuration. Table, "License Key Files," on page 60 describes the license key files.

All files are installed in <Install Path>\Rational\Common\ unless otherwise noted. Client files are installed during the installation of Rational software products with the Rational Software Setup program. Server files are installed on the license server system during the installation of the FLEXlm license software.

Table 6: License Key Files

File Name	Description	Notes
rational_temp.dat	Contains all client startup license keys.	You must obtain a permanent license key to continue to use your Rational software product past the startup key expiration date.
rational_perm.dat	Contains all client permanent license keys.	Run the License Key Administrator program on your client system to request new permanent keys.
rational_redirect.dat	Used on a client to specify the name of the license server system that manages floating licenses.	This file is initially empty. The Rational License Key Administrator updates this file with the name of your license server when you select server-based licensing.

Table 6: License Key Files (Continued)

File Name	Description	Notes
rational_server_temp.dat	Contains all startup server license keys on a license server.	You must obtain a permanent license key to continue to use your Rational software product.
rational_server_perm.dat	Contains all permanent server license keys on a license server.	Run the License Key Administrator program on your license server system to request new permanent license keys.

7

FLEXlm License Server Installation

This chapter describes how to use the Rational Software Setup wizard to install FLEXlm License Server Version 6.0, a software-based license server that:

- Provides flexible installation and maintenance of license keys
- Supports standard networking protocols

Before You Start the FLEXlm License Server Installation

The following sections list the steps you must take and information you must prepare before installing FLEXlm License Server.

Installation Requirements

Make sure that you have a current backup of your Registry and system directories before running the Rational Software Setup program.

Table 7, FLEXlm License Server Requirements, lists the system and software requirements for installing FLEXlm License Server:

Table 7: FLEXlm License Server Requirements

Item	Requirement
Operating System	Microsoft Windows NT 4.0, SP3
Processor	133 MHz or greater
Memory	64 MB
Disk space	1.8 MB
Privileges	To use the Rational Software Setup program on a Windows NT system, you must have Windows NT administrator privileges on the local system.

After you finish installing the FLEXlm License Server software, you must configure your license server. See “Configuring the License Server Software” on page 54.

Installing FLEXlm License Server with the Rational Software Setup Procedure

Preparing to Install FLEXlm License Server

The Rational Software Installation procedure uses `C:\Program Files\Rational` as the default install path. You can specify another drive during the installation procedure.

If your `C:\` drive lacks sufficient free disk space, you may either specify another drive or make space available on the default drive.

Caution Interrupting an installation that is in progress may leave your system in an indeterminate state. If you try to close the Rational Software Setup window while the installation is in progress, you are asked to confirm that you want to exit from the incomplete installation.

Typical Installation

This section describes a Typical installation of FLEXlm License Server.

For a more detailed description of the installation procedure, see “Using the Rational Software Setup Program” on page 67.

- 1 Insert the Rational Windows Solutions CD into your system’s CD drive.

The setup program starts automatically.

If autorun is disabled on your system, use Windows Explorer to locate and run the `SETUP.EXE` file on the Rational Windows Solutions CD.

- 2 The Rational Software Setup wizard guides you through the software installation. On each page, click **Next** to proceed to the next page.

The Rational Software Setup page provides general information about the software installation. Click **Browse** to review Rational product information. You must have a Web browser installed to view the product gallery.

The **Save** button lets you copy the contents of the setup wizard message window to a file. The **Copy** button copies the contents of the message window in the setup wizard to the Windows clipboard. The **Copy** and **Save** buttons are enabled on wizard pages that display the license agreement or installation messages.

The **Help** button is enabled on the Setup Configuration, Shared Components, and Software Use pages, providing you with additional information regarding setup options.

- 3 The Choose Product page provides a list of products for you to install. Select **GLOBETrotter FLEXIm License Server** from the list of products. Click **Next** to continue.

- 4 The License Agreement page displays the Rational Software license agreement. Choose to accept or not accept the license agreement.

If you accept the license agreement, the installation continues installing Rational software on your system. If you do not accept the license agreement, the installation does not let you proceed further. If you exit from the installation by clicking the **Finish** button at this point, no changes are made to your system.

- 5 Click **Finish** to exit from the Rational Software Setup wizard. If the **Launch License Key Administrator** check box is selected, the License Key Administrator will start after you click **Finish**.

The Rational Software Setup program writes a log of the installation activities. The log file is located in

```
<Install Path>\Rational\RSSetup\RSSetup.log.
```

Possible Reboot Required

If files required for the installation are in use during the installation procedure, the Rational Software Setup program may need to reboot your system to complete the installation.

- 1 After rebooting, log on as the same user to complete the installation procedure.

Part 2 of the installation automatically starts on your system.

- 2 Click **Finish** to exit from the Rational Software Setup program. If the **Launch License Key Administrator** check box is selected, the Rational License Key Administrator will start after you click **Finish**.

3 Click **Finish** to exit from the Rational Software Setup wizard.

You must then configure your license server and obtain your server licenses.

Removing FLEXlm License Server

This section describes how to remove FLEXlm License Server from your system.

Preparing to Remove FLEXlm License Server

Make sure that no one is using FLEXlm License Server or any associated files. You cannot remove files that are in use.

To remove FLEXlm License Server from a Windows NT system, you must have Windows NT administrator privileges on the local machine.

To Remove FLEXlm License Server

Use the Windows **Add/Remove Programs** control panel to select and remove FLEXlm License Server. The Rational Software Setup program removes FLEXlm License Server from your system. It does not remove directories that contain files that you have created using Rational Suite products.

8

Additional Installation Information

Troubleshooting Your Installation

If you have any problems running the Rational Software Setup program, try the following suggestions before you call Rational Customer Support for help:

- Be sure to stop all applications before you begin the installation.
- Turn off all virus protection software. These programs often run in the background and interfere with the installation and file decompression process.
- Turn off any user interface managers or desktop environments that run on top of Microsoft Windows.
- Change to a standard VGA video driver while Rational Setup is running, or disable video features such as virtual screens or screen switching.
- Change to a standard mouse driver, or disable special mouse features that perform tasks such as leaving pointer trails or changing pointer sizes.
- Make certain that your system meets the minimum system requirements listed in Table 2, “RequisitePro Requirements,” on pag e6.

Using the Rational Software Setup Program

The Rational Software Setup program provides you with several installation types, letting you install the configuration most appropriate for your system. Table 8, “Installation Types,” describes the installation types supported with the Rational Software Setup program.

Table 8: Installation Types

Type	Description
Typical	Installs the most commonly used features for a product. Use this option for standard installations.
Custom/Full	Allows you to add or remove features.

Table 8: Installation Types

Type	Description
Compact/Laptop	Installs a subset of the standard configuration. May omit optional files, including online documentation or online help. Use this option on systems with limited disk space.
Minimal	Installs the files needed to run the program from a CD or network location. Use this option to run the program from a centrally managed location.

Rational Software Setup lets you choose the Custom Installation option; you can set or clear the check box for products or product features on the Choose Features page. Setting or clearing installation options lets you install selected components of Rational software.

Installing Shared Components

The Rational Software Setup program needs to install shared components. A shared component is software provided by a company other than Rational. It is potentially available to other applications on your system.

If the setup program needs to update shared components, the setup program displays a list of the required files. The files listed must be installed on your system before the installation can proceed.

Setup installs U.S. English versions of the files. It does not overwrite newer file versions.

The check box, **Replace files with newer versions in English**, is enabled when you have installed earlier versions of the files that are localized to a non-U.S. English language. If you select this check box, the U.S. English versions of the files will replace your versions. If you clear this check box, the files will not be updated and you will need to update them yourself.

When to Install Files Yourself

In general, we recommend that you allow the installation procedure to install shared files for you. Under some circumstances, you may want to install the files yourself:

- You are using a U.S. English system, but installing new files may invalidate your current environment. In this case, you need to determine how to correct your environment so that you can run existing tools and the Rational products you want to install.
- Your site may mandate that you obtain shared files directly from the source, for example, from Microsoft, rather than using files supplied by a third party. Or your site may prohibit end-users from installing shared components.
- Rational supplies U.S. English versions of shared files. You may want to install equivalent files that are localized to your language.
- There may be a later version of the files available. Rational products should work with the supplied version of shared files or any later versions.

Using the Rational Software Setup Procedure

This section gives a more complete description of a Typical installation of Rational software than provided in the product chapters of this manual.

- 1 Insert the Rational Windows Solutions CD into your system's CD drive.

When you insert the Rational Windows Solutions CD, the setup program starts automatically.

If autorun is disabled on your system, use Windows Explorer to locate and run the `SETUP.EXE` file on the Rational Windows Solutions CD.

The Rational Software Setup wizard will guide you through the software installation. On each page, click **Next** to proceed to the next page.

- 2 The Rational Software Setup page provides general information about the software installation. Click **Browse** to review Rational product information. You must have a Web browser installed to view the archive.

The **Save** button lets you copy the contents of the setup wizard message window to a file. The **Copy** button copies the contents of the message window in the setup wizard to the Windows clipboard. The **Copy** and **Save** buttons are enabled on wizard pages that display the license agreement or installation messages.

- 3 The Choose Install Type page displays the installation options for the software installation.

Note If you have previously performed a Typical installation of Rational software with the Rational Software Setup program, the Minimal

installation type is disabled. Similarly, if you performed a Minimal installation, then all other installation types are disabled. You must remove Rational software to enable all installation options.

The options are Typical, Custom, Compact, and Minimal, described in Table 8, “Installation Types,” on pag e67.

- 4 The Choose Product page presents a list of products for you to install.
- 5 The License Agreement page displays the Rational Software license agreement. Choose to accept or not accept the license agreement.

If you accept the license agreement, the installation continues installing Rational software on your system. If you do not accept the license agreement, the installation does not let you proceed further. If you exit from the installation by clicking the **Finish** button at this point, no changes are made to your system.

- 6 The Setup Configuration page describes the setup options for this software installation. Select the installation option.

Confirm that you have sufficient free space for the installation. If the amount of free space is less than the amount required, either exit from the installation procedure and make more space available on the specified disk or specify an alternate Install Path.

To specify another Install Path, type the new path in the Install Path field or use the **Browse** button to select a drive and directory.

The setup procedure installs Microsoft Core Components and some additional files on your C: drive, even if you have specified an alternate drive for installation. These files can require up to 20 MB of disk space on your C: drive.

Note The installation program requires that all Rational programs be installed in the same directory. If any Rational product has been previously installed with the Rational Software Setup program, the browse option and Install Path field are disabled. You must remove and reinstall Rational software to specify a new Install Path.

- 7 On the Choose Features page, if you choose the **Custom/Full** installation option, you will see the Choose Features page. This page lets you specify exactly which features and subfeatures to install on your system. Use the **+** to expand and select or deselect options as desired. There are dependencies between some products which may force an installation option, even if you have deselected it.

- 8 The Shared Components page appears if the Rational Software Setup program needs to update some shared files on your system. Click **Next** to have Rational Software Setup install these files for you or **Cancel** to install these files yourself. For additional information, see “Installing Shared Components” on page e68 or the Rational Software Setup online help.

Note The Rational Software Setup wizard does not recalculate the disk space required for your custom selections.

- 9 The Software Use page appears if you have selected a Rational Suite, ClearQuest, or Robot product for installation. Refer to the Rational Suite Installation Guide for more information.

Note The software use options do not appear when you install Rational RequisitePro or RequisiteWeb.

- 10 The Confirmation page displays the product features that will be installed.
- 11 The Installation Summary page displays errors from the first part of the software installation. If the installation is successful, the message window on the Installation Summary page is blank.

The Rational Software Setup program writes a log of installation activities. The log file is located in

```
<Install Path>\Rational\RSSetup\RSSetup.log
```

Possible Reboot Required

If files required for the installation are in use during the installation procedure, the Rational Software Setup program may need to reboot your system to complete the installation.

- 1 After rebooting, log on as the same user to complete the installation procedure.

Part 2 of the installation automatically starts on your system.

- 2 Click **Finish** to exit from the Rational Software Setup program.

If the **Launch License Key Administrator** check box is set, the Rational License Key Administrator will start after you click **Finish**.

Installation Messages

Contact Rational Customer Support for information and assistance regarding any error messages you encounter while installing Rational software. Table 9 below, provides contact information.

Support Information

Contact Rational Customer Support if you have questions regarding the installation, use, or maintenance of this Rational Software product.

Table 9 provides Rational Customer Support telephone and e-mail contact information.

Table 9: Rational Customer Support Information

Rational Support Resource	Contact Information	Notes
U.S. and Canada	800-433-5444 support@rational.com	Specify "Rational Software" in the subject line of the e-mail message. For existing issues, put the case ID of the issue in the subject line as well.
Europe	Phone: +31 (0)20 4546 200 Fax: +31 (0)20 4546 201	support@europe.rational.com
Asia Pacific	+61-2-9419-0111	support@apac.rational.com
World Wide Web	www.rational.com	Use the Feedback link to go to the feedback page.

Table 10 provides Rational License Support contact information. If you have questions about acquiring license keys for your Rational Software products, contact Rational License Support. See the online help in the Rational License Key Administrator for additional licensing support information.

Table 10: Rational Licensing Support

Region	Telephone	E-mail
North and South America	1-800-728-1212 1-781-676-2510 FAX: 781-676-2510	lic_americas@rational.com
Europe (includes Israel and Africa)	Phone: +31 23 554 10 62 FAX: +31 23 554 10 69	lic_europe@rational.com
Japan	Phone: +81-3-5423-3611 FAX: +81-3-5423-3622	lic_japan@rational.com
North Asia Pacific (China, Hong Kong, Taiwan)	Phone: +852 2143 6382 FAX: +852 2143 6018	lic_apac@rational.com
Korea	Phone: +82 2 556 9420 FAX: +82 2 556 9426	lic_apac@rational.com
South Asia Pacific (includes Australia, New Zealand, Malaysia, Singapore, Indonesia, Thailand, Vietnam, the Philippines, India, and Guam)	Phone: +612-9419-0100 FAX: +612-9419-0160	lic_apac@rational.com

9

Glossary

ANY-HOST

A license key issued for ANY-HOST will run on any system, and is not tied to the customer's system ID.

Emergency Key

A temporary license that allows customers to use Rational software for a fixed period of time if they cannot use their own license for some reason. The duration of the Emergency Key is 5 days. Emergency Keys can be node-locked or floating. Emergency Keys are distributed by the Licensing Support Group and will run on any host.

Evaluation Key

A temporary license that allows a customer to use and evaluate Rational software for a fixed period of time. The product Business Unit determines the duration of the Evaluation Key. Evaluation Keys can be node-locked or floating. Evaluation Keys are distributed by the Sales team and will run on any host.

Floating License

A license type that links products to a License Server system. Client systems access licenses on the License Server system when they need to run a copy of Rational software. Multiple clients may share the pool of floating licenses; one license is granted per client per product. Floating Licenses on License Servers are typically administered by System Administrators.

GLOBEtrotter FLEXlm Server

Software license manager for Windows, NT, UNIX, Java and VMS.

Key Type

Node-locked and floating licenses may be enforced by different types of license keys. The types of license keys are: Startup and Permanent. Evaluation, Emergency, and Temporary keys are variations of Startup keys. These keys are issued by different groups (i.e. Sales, Order Entry, Tech Support, License Support) at different times, for different purposes,

and governed under different business rules and policies.

License

A legal right to use a product. Customers receive a license when they purchase the product. However, they need a License Key to actually associate the product and the system on which it is running with a license.

License Key Code

An encrypted code used to enforce a license agreement.

License Key Certificate

A piece of paper or electronic file that contains information needed by a customer in order to begin using Rational software with a license. The License Key Certificate is shipped to the customer with the software installation media.

License Key Administrator

A program written by Rational Software, which provides a customer interface to Rational's Licensing system. Starting with the release of Rational Suites 1.0 and associated point products, the License Key Administrator is installed whenever a Rational software product is installed on a Windows system. For hosting floating licenses, the License Key Administrator is installed when the Globetrotter FLEXlm server is installed on a License Server system.

License Key

Generic term used in this document to describe keys that enable licenses on a customer system. The types of License Keys are: permanent, startup, evaluation, emergency, and Term License Agreement (TLA).

License Type

The valid types of licenses are node-locked licenses and floating licenses.

Node-locked License

A type of license that links a product to a system. Typically, one node-locked license is issued per software copy, but exceptions may be made in the case of a user who needs to run a single copy of the software on two systems.

Permanent Key

A license issued to a customer for running Rational products. Permanent licenses are keyed to a product and system. Permanent Keys have expiration dates that vary by product, but are usually two product cycles. Permanent Keys can be node-locked or floating. Node-locked Permanent

Keys are installed on a client system, and floating Permanent Keys are installed on a License Server system. The Rational BackOffice issues permanent Keys.

Permanent Key Code

The FLEXIm encrypted code that permanently allows a customer to run a particular Rational product using a Permanent Key.

Startup Key

A short-term license key that allows a customer to run Rational software products. Startup licenses are not keyed to a specific system. Startup Keys can be node-locked or floating. Node-locked Startup Keys are installed on a client system, and floating Startup Keys are installed on a License Server system. Startup Keys are issued by the Rational BackOffice and will run on any host.

Startup Key Code

The FLEXIm encrypted code that temporarily allows a customer to run a particular Rational product using a Startup Key.

Temporary Key

A short-term license key that allows a customer to temporarily run Rational software products. The Licensing Support group creates temporary Keys when they are unable to immediately fulfill a customer's request for a permanent key. Temporary keys can be node-locked or floating. Temporary keys are specific to a customer and system. Currently used by Rose UNIX to grant emergency or short-term keys to customers.

Term License Agreements (TLAs)

Variations of a Permanent Key. TLAs are issued to a site to allow their employees to use Rational software for a negotiated period of time. TLAs are issued by Rational Sales.

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