

Rational Suite

Administrator's Guide

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WINDOWS

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Preface

This manual provides an overview of the typical tasks that an administrator needs to perform to set up and maintain a Rational Suite environment. This manual describes some topics in more detail and provides pointers to other resources.

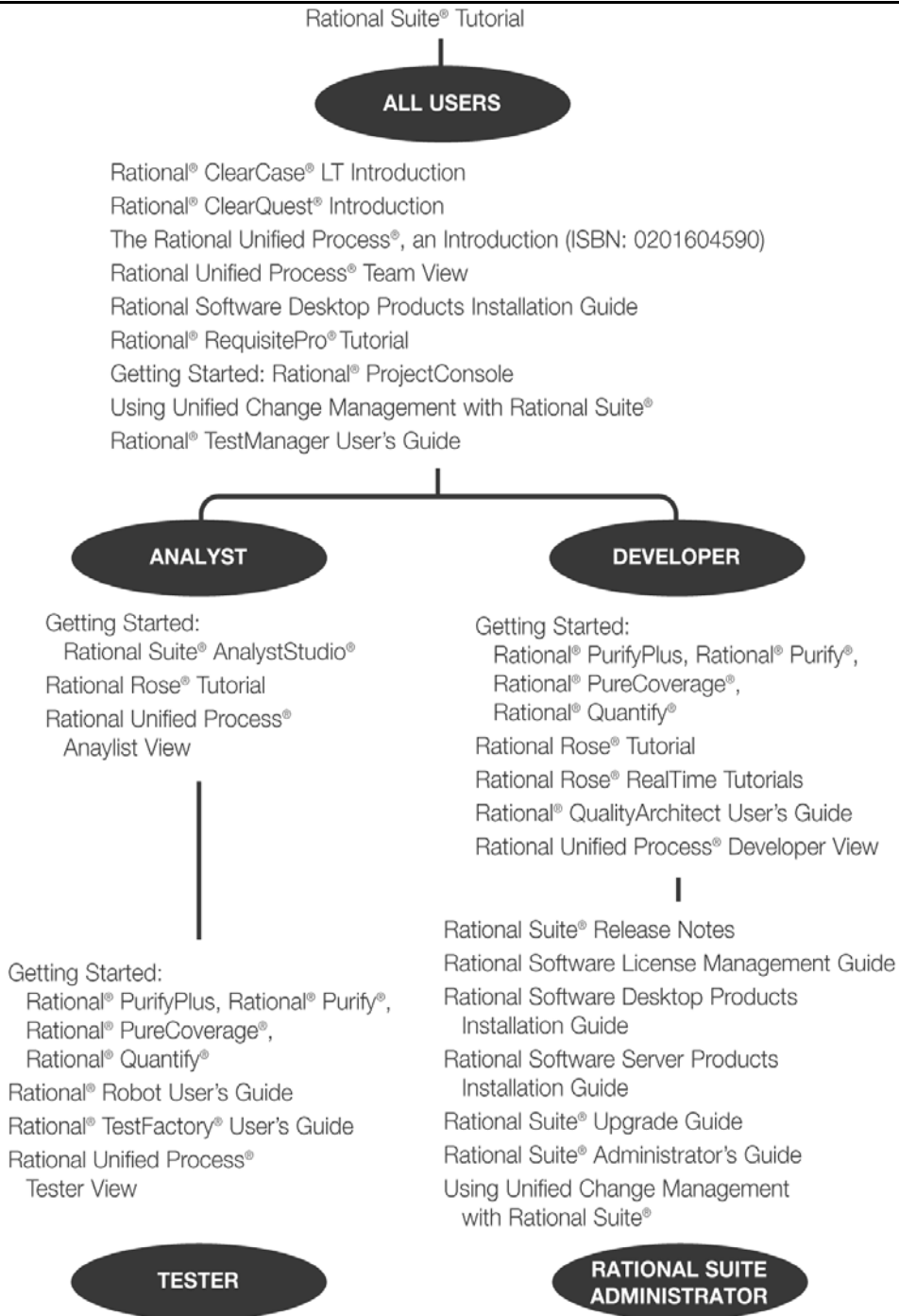
Audience

This guide is intended for Rational Suite administrators.

Other Resources

- All manuals are available online, either in HTML or PDF format. The online manuals are on the Rational Solutions for Windows Online Documentation CD.
- To send feedback about documentation for Rational products, please send e-mail to techpubs@rational.com.
- For more information about Rational Software technical publications, see: <http://www.rational.com/documentation>.
- For more information on training opportunities, see the Rational University Web site: <http://www.rational.com/university>.
- For articles, discussion forums, and Web-based training courses on developing software with Rational Suite products, join the Rational Developer Network by selecting **Start > Programs > Rational Suite > Logon to the Rational Developer Network**.

Rational Suite Documentation Roadmap



Contacting Rational Customer Support

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

| Your Location | Telephone | Facsimile | E-mail |
|-----------------------------|--|------------------------------------|-----------------------------|
| North America | (800) 433-5444 (toll free) (408) 863-4000 Cupertino, CA | (781) 676-2460 Lexington, MA | support@rational.com |
| Europe, Middle East, Africa | +31 (0) 20-4546-200 Netherlands | +31 (0) 20-4546-201 Netherlands | support@europe.rational.com |
| Asia Pacific | +61-2-9419-0111 Australia | +61-2-9419-0123 Australia | support@apac.rational.com |

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

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

Setting Up a Rational Suite Environment

1

This chapter describes tasks to perform to set up a Rational Suite environment when you are installing Rational Suite for the first time on your network.

These tasks include the following:

- Plan network resources.
- Configure licenses.
- Install Rational Suite software on servers.
- Configure servers and files.
- Configure integrations.
- Install Rational Suite software on clients.

For information about upgrading Rational Suite, see the *Rational Suite Upgrade Guide*.

Plan Network Resources

During planning, you work in these areas, as described in this section:

- Planning for UCM (Unified Change Management).
- Designating servers.
- Developing a database plan.
- Configuring databases.
- Configuring security.

Planning for UCM

Unified Change Management is the Rational Software process of managing change in software development from requirements to release. Configuring a network to work with UCM requires special considerations. If you plan to use UCM to store Rational assets, see *Using Unified Change Management with Rational Suite*.

Designating Servers

Before you install Rational Suite, you need to determine which computers you will use as servers. Servers need to be highly available, and may need extra memory and disk space. Table 1 describes types of servers you may want to include in your environment. Note that you may be able to combine several servers on one computer.

Table 1 Servers Used with Rational Suite

| Type of Server | Description |
|-----------------------------------|---|
| License server | If you use floating licenses, you need to set up a server to administer the licenses. For more information, see the <i>Rational Suite License Management Guide</i> . |
| Web server | Some Rational tools include a Web component. You can set up a Web server for these tools: <ul style="list-style-type: none">▪ ClearCase LT.▪ ClearQuest.▪ RequisitePro.▪ ProjectConsole. For more information, see the <i>Rational Software Server Products Installation Guide</i> . |
| Database server | If you are using commercial databases with Rational Suite products, we recommend that you install those databases on dedicated servers. See <i>Developing a Database Plan</i> on page 14. |
| ClearCase LT server | ClearCase LT is a client/server product. To use a ClearCase LT client, a ClearCase LT server must be installed in the same network domain as the clients. A client can work with exactly one server. For guidelines about selecting a ClearCase LT server system, see the <i>Rational Software Server Products Installation Guide</i> . |
| ClearQuest administrator's system | To use ClearQuest, you need to designate one computer as the administrator's system. See the <i>Rational Software Server Products Installation Guide</i> . |

Developing a Database Plan

For each Suite product you are using, you need to decide which database management system to use with Rational Suite. Table 2 summarizes choices based on the size of the user group planned for each product.

Table 2 Commercial Database Choices

| | Rational ClearQuest | Rational RequisitePro | Rational Test | ProjectConsole |
|-----------------------------------|-------------------------------|--|----------------------------------|-------------------------------|
| Microsoft Access | Fewer than 5 concurrent users | 5 or fewer concurrent users per RequisitePro project | No more than one concurrent user | Fewer than 5 concurrent users |
| Sybase SQL Anywhere Server | 5 to 20 concurrent users | N/A | One or more concurrent users | 5 to 20 concurrent users |
| Microsoft SQL Server | More than 20 concurrent users | 6 or more concurrent users per database | N/A | More than 20 concurrent users |
| Oracle | More than 20 concurrent users | 6 or more concurrent users per schema | N/A | More than 20 concurrent users |
| IBM DB2 | More than 20 concurrent users | N/A | N/A | More than 20 concurrent users |

The number of concurrent users is determined by the total number of current users accessing the database or schema.

Database performance depends on factors such as: number of users, network response time, number of records in the database, and database tuning. Refer to product documentation for more details about each choice.

When you use Oracle or SQL Server to store RequisitePro projects, you may include multiple projects within one Oracle schema or SQL Server database.

Microsoft Access Runtime is automatically installed when you install at least one Rational Suite product on your computer. (The Access development environment is not installed.) Also, Sybase SQL Anywhere is available on the product CD, but it is configured to work only with Rational products. SQL Anywhere is not installed automatically and must be installed separately from Rational Suite.

The *Rational Software Server Products Installation Guide*, included with your Rational Suite media kit, provides an overview of the installation, configuration, and administration of different database management systems, particularly for use with ClearQuest.

Configuring Databases

For Rational products that work with commercial databases, install and configure those databases before installing Rational products.

Configuring Security

You set security for some Rational Suite products by using the Rational Administrator to set up authorization for users and groups. You set security parameters through individual point products for other products.

Table 3 provides an overview of how to set up security in each Rational tool.

Table 3 Summary: Setting Up Security for Rational Tools

| Tool | Comments |
|-----------------------|---|
| Rational ClearQuest | The ClearQuest administrator uses the ClearQuest Designer to set up user and group access to the ClearQuest database. See <i>Rational ClearQuest Administrator's Guide</i> . |
| Rational RequisitePro | The RequisitePro administrator sets up RequisitePro users and groups by setting project security for the RequisitePro database. See <i>Rational RequisitePro User's Guide</i> . |
| Rational Rose | Rational Rose does not support user lists. To set security for Rose, secure the directory containing the Rose models. |
| Rational Test | Use the Rational Administrator to add users and groups to the test datastore. See <i>Managing Test Users and Groups</i> on page 45. |
| Rational Project | Supply an optional password to secure the Rational project. See <i>Creating the Rational Project</i> on page 28. |

Configuring Licenses

Rational Suite uses Rational Common Licensing Services. Before installing Rational software, decide what types of licenses you want to use and, if necessary, configure licenses for the software you will install. For more information about licensing, see *Rational Suite License Management Guide*, included with your Rational Suite media kit.

Installing Rational Suite Software on Servers

Use the Rational Software Setup program to install Rational Suite on your network servers. The Rational Software Setup program allows you to install Rational Suite and other Rational Software products.

You can use the Setup program to perform a standard install or a silent install.

For assistance while using the program, see the Rational Windows Setup Help.

Installing Rational ClearCase LT

To use ClearCase LT, you must:

- Install ClearCase LT server on the computer before installing Rational Suite.
- Install ClearCase LT server before you install ClearCase LT clients. This enables you to specify the server name during client install, rather than having to configure a pointer to the server at a later time.

Configuring Servers and Files

After you install Rational software, perform other tasks to configure the servers, including Web servers, and files that you will use with Rational tools. Table 1 on page 14 lists the types of servers that you may need to configure. The *Rational Software Server Products Installation Guide* provides an overview of procedures to follow after you install Rational software.

Configuring Integrations

Configure integrations that you plan to use, as described in Table 4.

Table 4 Rational Suite Integrations

| Integration | Comments |
|------------------------------|--|
| Rational project | A Rational project associates datastores from Rational products, enabling integrations across Rational Suite. For an overview, see <i>Creating the Rational Project</i> on page 27. |
| UCM | UCM is a process related to configuration management. Tool support for UCM is included in Rational ClearCase and Rational ClearQuest. See <i>Using Unified Change Management with Rational Suite</i> . |
| UCM and ClearQuest | To learn about requirements for adding ClearQuest to a UCM-enabled project, see the “Enabling ClearQuest for UCM” chapter in <i>Rational ClearQuest Administrator’s Guide</i> . |
| RequisitePro and ClearQuest | This integration allows you to link defect and enhancement requests to requirements, allowing you to trace back to a report’s origin. See <i>Configuring the Integration for ClearQuest and RequisitePro</i> on page 51. |
| Integrations with ClearQuest | To learn about configuring integrations that work with ClearQuest, see the “ClearQuest Schemas and Packages” chapter in <i>Rational ClearQuest Administrator’s Guide</i> . |

Table 4 Rational Suite Integrations (continued)

| Integration | Comments |
|--------------------------------|---|
| Extended Help | Extended Help, available from all Rational Suite tools, allows you to view relevant topics in the Rational Unified Process, depending on the context from which you start. You can also customize Extended Help to include information relevant to your team. See your application's online Help. |
| Integrations with RequisitePro | To learn about configuring integrations that work with RequisitePro, see the "Integrating with Other Products" chapter in <i>Rational RequisitePro User's Guide</i> . |

Installing Rational Suite Software on Client Computers

After you set up the server environment for Rational Suite, you can install Rational software on client computers. The *Rational Software Server Products Installation Guide* contains more information, including information about prerequisites, how to install on a client computer, and activities to perform after you install.

Understanding a Rational Project

2

This chapter provides information about Rational projects so you can work with them more effectively. This chapter helps you understand:

- The structure of a Rational project
- Unified Change Management (UCM) in the context of a Rational project
- The Rational Suite artifacts that can be associated with a project, and the artifacts' relationship to the Rational project

What Is a Rational Project?

A Rational project is a logical collection of databases and datastores that associates the data you use when working with Rational Suite. This collection of data resides in a Rational project (.rsp) file, with a name of your choice (for example, project.rsp). A Rational project consists of the following artifacts:

- Zero or one RequisitePro project
- Zero or one Rational Test datastore
- Zero or one ClearQuest database
- Unlimited Rose model files

About the Rational Administrator

You use the Rational Administrator to manage your Rational Suite environment. The Rational Administrator is a tool for managing associations (or pointers) between Rational artifacts such as test datastores, Requisite Pro projects, and Rose models.

You can use the Rational Administrator to:

- Create and manage a Rational project, which is a subset of associations between Rational Suite artifacts.
- Create and maintain users and groups.
- Upgrade project assets in Requisite Pro databases and test datastores.
- Enable a Rational project for use with Unified Change Management (UCM).

Why Work with Rational Projects?

Creating a Rational project allows you to take advantage of many of the integrations among Rational Suite tools. For example:

- From the Test Log window of the Rational Test Manager, you can generate a defect in ClearQuest.
- You can associate RequisitePro requirements with Rational test datastores.
- You can associate Rose data models with RequisitePro requirements through all iterations of the model design.
- By associating a ClearQuest and RequisitePro database, you can tie defects to the requirements from which they originate.

What Is UCM?

Unified Change Management (UCM) is the Rational Software process of managing change in software system development from requirements to release. UCM spans the development lifecycle, defining how to manage change to requirements, design models, documentation, components, test cases, and source code.

UCM is unique because it links *activities* used to plan and track project progress with the *artifacts* that are undergoing change. An activity might arise from an issue raised in a meeting, a defect entered into a defect database, or a request for enhancement sent in by a customer.

Many development teams use UCM to manage change to source code. You can also use UCM to manage change to these elements of a Rational project: RequisitePro projects, Rational test datastores, and Rose model files.

You use the Rational Administrator to enable UCM to work with a Rational project; for complete information on using UCM with Rational Suite, see *Using Unified Change Management with Rational Suite*.

Understanding Rational Projects and Related Artifacts

This section describes each type of artifact you can associate with a Rational project and its relationship to the Rational project.

RequisitePro Projects

Using a Rational RequisitePro project, you can organize, prioritize, track, and control changing requirements. You can manage all of your software development project's requirements — user requirements, software specifications, and use cases — using the RequisitePro database as a central repository.

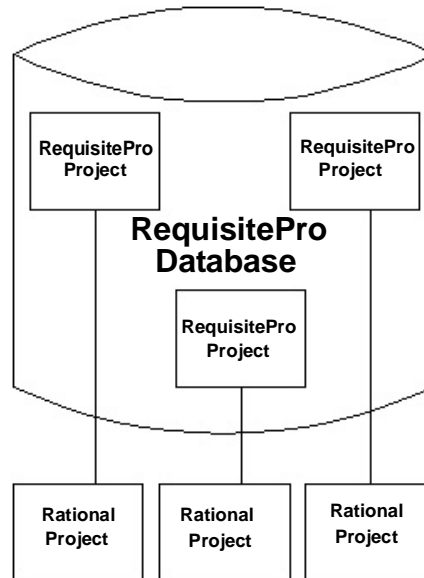
You itemize requirements within requirements documents, and then manage them using an integrated database. Each RequisitePro project consists of requirements documents and a dynamically-linked RequisitePro database. Your teams can collaborate, communicate, and provide updates on the same project. A RequisitePro project document can store text, graphics, or other objects (such as OLE objects) that identify project needs and are meaningful to users.

There can be several RequisitePro projects within one RequisitePro database, each one associated with a separate Rational project.

There can be only one Rational project associated with each RequisitePro project. If a RequisitePro project is associated with a Rational project, and you associate the same RequisitePro project with another Rational project, the association with the first Rational project will be removed.

Figure 1 shows the relationship of RequisitePro Projects to Rational Projects.

Figure 1 The Relationship of RequisitePro Projects to Rational Projects



Read about setting up RequisitePro in the *Rational Software Server Products Installation Guide*. Read about using RequisitePro in *Rational RequisitePro User's Guide*.

Test Datastores

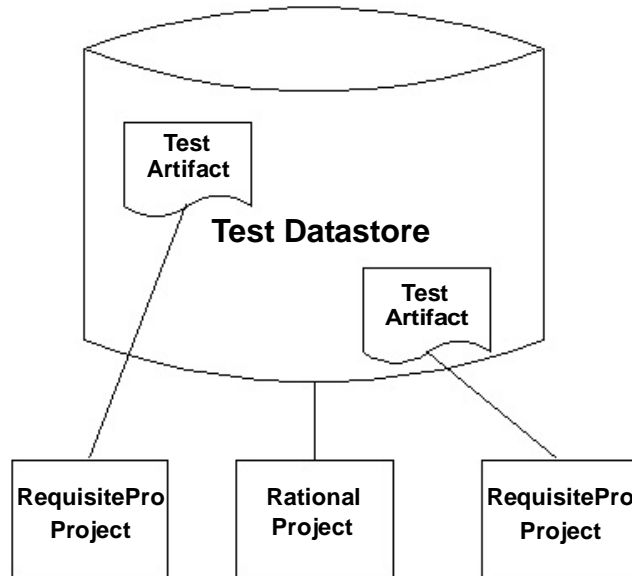
A Rational test datastore is a collection of related test assets including test scripts, suites, datapools, logs, reports, test plans, and build information.

Team members often want to test and report on the work involved in a project through the same shared resources, for example, the same test datastore or the same ClearQuest defect database. There can be only one test datastore for each Rational Project.

Each test artifact in a test datastore can be associated with at most one RequisitePro project. However, a test datastore can contain artifacts that point to different RequisitePro projects. So, for example, you can associate requirements from many RequisitePro projects with test cases in the same test datastore.

Figure 2 shows the relationship between a test datastore and a Rational project.

Figure 2 Relationship Between a Test Datastore and a Rational Project



See *Rational TestManager User's Guide* for more information.

ClearQuest Databases

Rational ClearQuest is a change request management tool that helps you track and manage all change activities (such as defects and enhancement requests) associated with a Rational project. When used with other tools in the Rational Suite, ClearQuest can play an important role in supporting change and defect management in an iterative software development environment.

A Rational ClearQuest database consists of a schema repository and a user database:

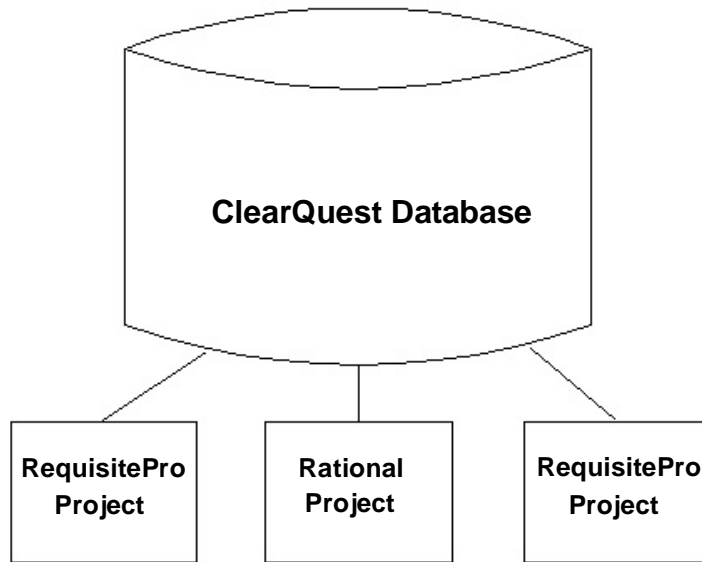
- The ClearQuest schema repository stores all schemas and all system data associated with existing schemas. The schema repository does not store any user data.

- A ClearQuest user database contains all user data and a copy of the schema associated with the database. User data in a ClearQuest database includes change-request records (such as defects), as well as reports, records or tables, and all data entered by users.

One ClearQuest database can be used by multiple Rational projects.

Figure 3 shows the relationship between a ClearQuest database and a Rational project.

Figure 3 Relationship Between a ClearQuest Database and a Rational Project



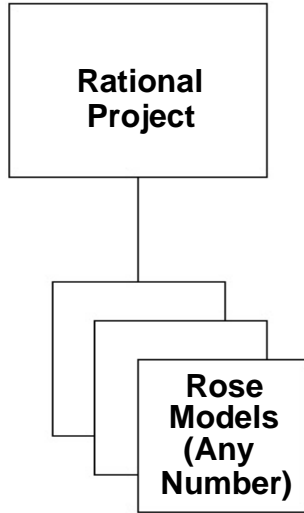
For a detailed overview of ClearQuest, see *Rational ClearQuest Introduction*.

Rose Model Files

Rational Rose enables visual modeling of architectures, components, and data using the Unified Modeling Language (UML). From a Rose model, you can automatically implement the framework of your code in a number of popular languages. Rose also helps you maintain consistency between a software model and its implementation in code. A Rational project can be associated with an unlimited number of Rose models.

Figure 4 shows the relationship between Rose models and a Rational project.

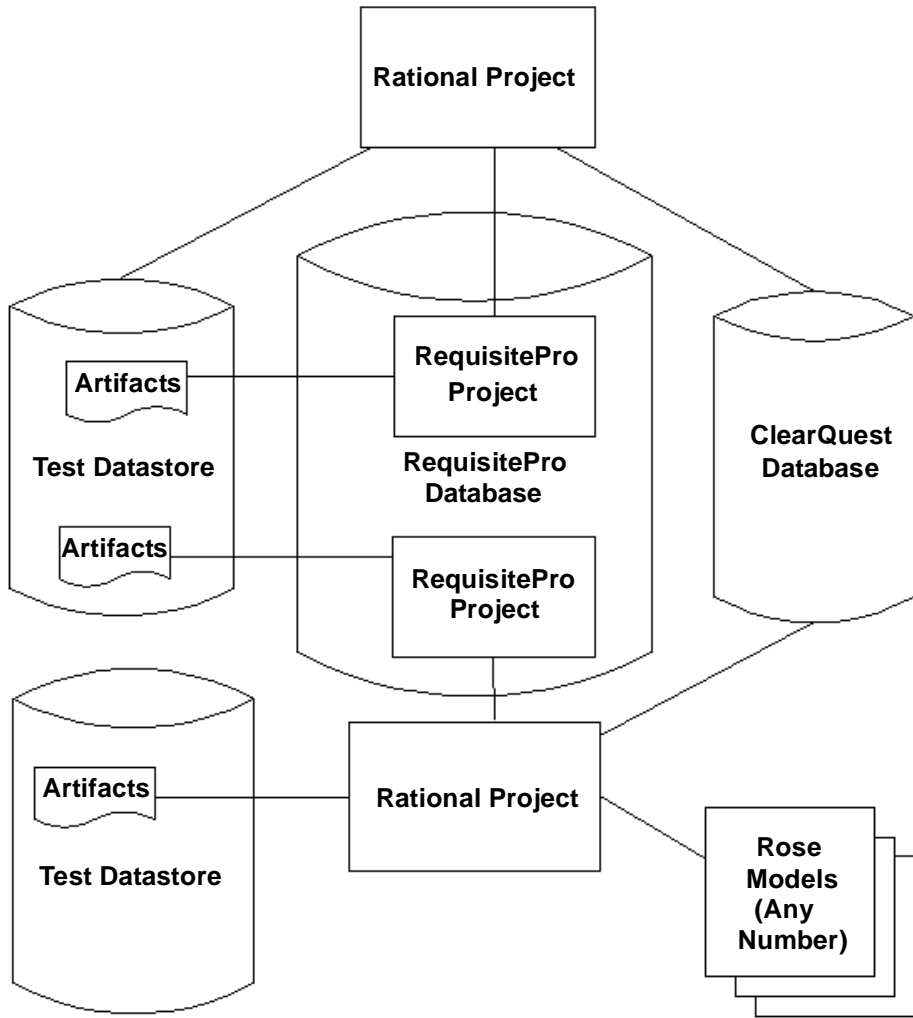
Figure 4 Relationship Between Rose Models and a Rational Project



Relating Rational Artifacts to a Rational Project

Figure 5 shows the possible relationships between a Rational project and associated artifacts. Multiple instances of the Rational project indicate that more than one project can be associated with the attached artifact.

Figure 5 Relationship Between Rational Artifacts and a Rational Project



Creating and Configuring a Rational Project

3

This chapter shows you how to create and configure a Rational project.

Creating the Rational Project

To create a Rational project, perform the following steps as described in the remainder of this section:

- 1 Decide where to locate the project.
- 2 Create a shared directory in which you will store the project.
- 3 Create the project.

A later section describes how to configure a project.

Deciding Where to Locate the Project

Determine where the project will reside, following these guidelines:

- The Rational project contains pointers to the Rational Suite tools' databases. Therefore, these databases can reside anywhere on your network system.
- Before proceeding, create the top-level directory of the project. Make sure the directory is empty and make it a shared directory. Read about *Creating a Shared Directory* on page 27. If you do not share the directory, the project will not be available to members of your team.
- If you are using UCM, there may be special considerations for locating the Rational project. See *Using Unified Change Management with Rational Suite*.
- Rational project pathnames should be as brief as possible, and no longer than 256 characters. Use of longer pathnames increases the possibility of datastore errors within Rational Test Manager.

Creating a Shared Directory

Before you create the Rational project, create a share name pointing to the directory that will contain the project's files:

- 1 Create a directory on the computer where you will create the Rational project. Choose an area that is not under version control. In other words, the area should not be part of a VOB.
- 2 Create a share name pointing to the directory you created in Step 1:
 - a In Windows Explorer, navigate to the directory and select the directory name.
 - b Click **File > Sharing**.
- 3 On the directory's Properties page, on the **Sharing** tab:
 - a Select **Shared As**.
 - b In the **Share Name** field, enter a meaningful name describing the directory, for example, *rational-project*.
 - c Click **OK**.

Sharing the directory enables users and other programs to access the Rational project over the network by using UNC pathnames. For more information on how and when to use UNC pathnames, see the Windows online Help.

Creating the Rational Project

To create a Rational project, perform the following steps:

- 1 Start the Rational Administrator: click **Start > Programs > Rational Suite > Rational Administrator**.
- 2 Start the New Project Wizard by clicking **File > New Project** on the Administrator menu.
- 3 On the wizard's first page:
 - a Supply a name for your project, for example, *revenue*. The dialog box prevents you from typing illegal characters.
 - b In the Project Location field, specify a UNC pathname to the root of the project, referring to the share name you created (for example, `\\computer-name\rational-project\revenue`). Make sure that you specify a path that is at least in a subdirectory of the share; in this example, *rational-project* is the share, so you need to specify a directory at least one level lower.
 - c Clear the check box **Use ClearCase and Unified Change Management to baseline project assets** because you aren't working with a UCM-enabled project. To learn about this topic, see *Using Unified Change Management with Rational Suite*.
- 4 If you do create a password for the Rational project, supply the password on the Security page. If you do not create a password, then leave the fields blank on this page.

- 5 On the Summary page, select **Configure Project Now**. The Configure Project dialog box appears.

Configuring the Rational Project

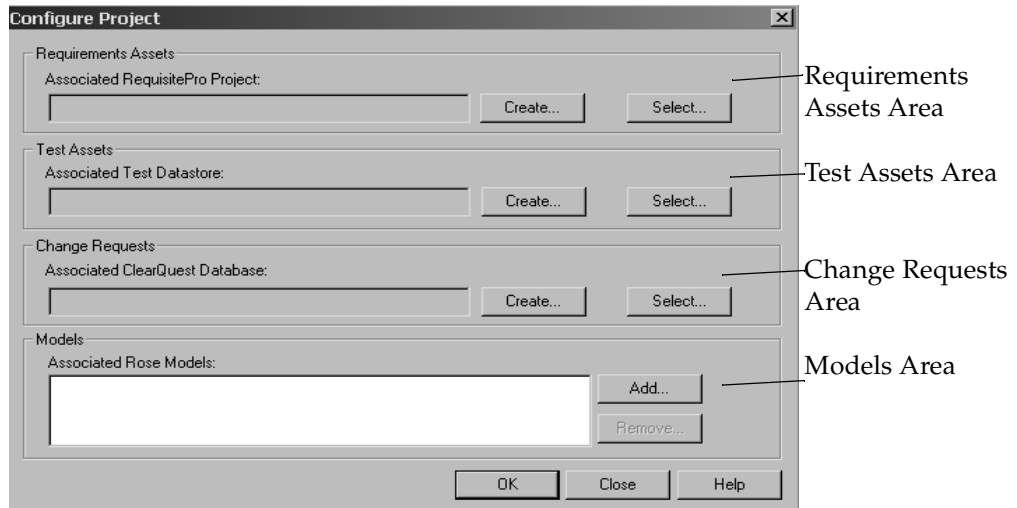
To configure a Rational project, you associate the project with the following artifacts:

- Zero or one RequisitePro project
- Zero or one test datastore
- Zero or one ClearQuest database
- Unlimited Rose model files

If the Configure Project dialog box is not visible, display it as follows:

- 1 In the Rational Administrator, select the project you want to configure and click **File > Connect**. Supply a password if one is required.
- 2 Select the project to configure and click **File > Configure Project**. The Configure Project dialog box appears as shown in Figure 6.

Figure 6 The Configure Project dialog box



Working with ClearQuest MultiSite

You can use ClearQuest MultiSite to share access to a ClearQuest database among multiple sites by creating replicas of the database.

If you have a replicated ClearQuest database, you can configure Rational projects only if your current replica masters the RA_Project record.

Associating Requirements

A *RequisitePro* project organizes and helps you manage a related set of requirements. Each RequisitePro project includes a requirements database, documents, discussions, histories, and other management-related and administrative items.

You can create a new RequisitePro database or associate an existing database.

Creating a New RequisitePro Project

To create a new RequisitePro project:

- 1 On the Configure Project dialog box, click **Create** in the Requirements Assets area. RequisitePro displays the Create Rational RequisitePro Project dialog box.
- 2 Select a Project Template, for example, *Use-Case Template*, then click **Create**.
- 3 On the Project Properties dialog box:
 - a In the **Name** field, specify a name for the RequisitePro project.
 - b In the **Directory** field, use a UNC pathname to specify the location where you'd like the requirements to reside. For example, you might specify:
\\computerA\project-directory\requirements.
 - c In the **Database** field, specify the type of database you plan to use with your RequisitePro project. You configured this database in *Configuring Databases* on page 16.
 - d Optionally, provide a comment describing the RequisitePro project.
 - e Click **OK**. RequisitePro creates the project.

Associating an Existing RequisitePro Project with the Rational Project

To associate an existing RequisitePro project with your project, perform these steps:

- 1 On the Configure Project dialog box, click **Select** in the Requirements Assets area. The Select RequisitePro Project File dialog box appears.
- 2 Navigate to the RequisitePro project file you want to associate with the Rational project.

Working With RequisitePro and XDE

You can use the integration between RequisitePro and XDE to create links between RequisitePro projects and XDE models.

To take advantage of the integration, use XDE to convert the RequisitePro project into XDE format. The Rational Administrator continues to display the older version of the RequisitePro project, as it was just before the conversion. The Rational Administrator does not display the converted version of the RequisitePro project.

Warning: After conversion, the old RequisitePro project is obsolete and should not be used. After you convert your RequisitePro project to XDE, use XDE to manage the project.

For more information on this topic, see the migration information in the XDE online Help as well as compatibility information in the XDE Release Notes.

Associating a Test Datastore

A Rational test datastore is a collection of related test assets, including test scripts, suites, datapools, logs, reports, test plans, and build information.

You can create a new test datastore or associate an existing test datastore.

Creating a New Test Datastore

To create a new test datastore:

- 1 On the Configure Project dialog box, click **Create** in the Test Assets area. The Create Test Datastore wizard starts.
- 2 On the first page of the wizard, select the vendor database you want to work with. Click **Next**.
- 3 Complete the second page of the wizard with the UNC pathname of the test datastore you want to create (for example, \\computerA\project-directory\tests) and other information specific to the vendor database you chose in Step 2. Click **Next**.
- 4 On the third page of the wizard, select initialization options as appropriate and click **Next**.
- 5 The Summary page is displayed, indicating the wizard has completed. Click **Finish**.

Your test datastore has been successfully created.

Associating an Existing Test Datastore with the Project

To associate an existing test datastore with your project:

- 1 On the Configure Project dialog box, click **Select** in the Test Assets area. The Select Test Datastore dialog box appears.
- 2 Navigate to the test datastore you wish to associate with the Rational project, or enter the UNC pathname where the test datastore resides.

Note: We recommend that you run the Datastore Doctor on the datastore prior to associating it with a project. See the online Help for more information on the Datastore Doctor.

Associating a ClearQuest Database

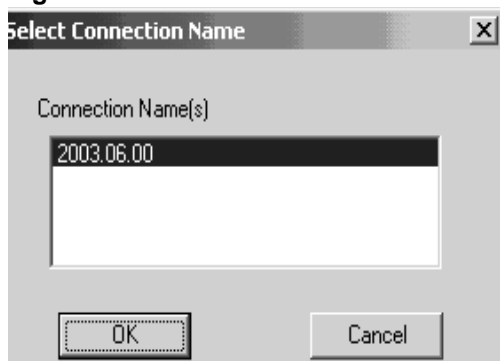
Rational ClearQuest is a change request management tool that helps you track and manage all the change activities (such as defects and enhancement requests) associated with a Rational project.

Note: Before beginning this procedure, ensure you have the 2003.06.00 database connection name defined to ClearQuest. To verify this, start the ClearQuest Maintenance Tool and ensure that the 2003.06.00 connection name appears in the left pane of the tool. Unless otherwise specified, this is the default connection name you want to work with.

Perform the following steps to associate an existing ClearQuest user database with the Rational project:

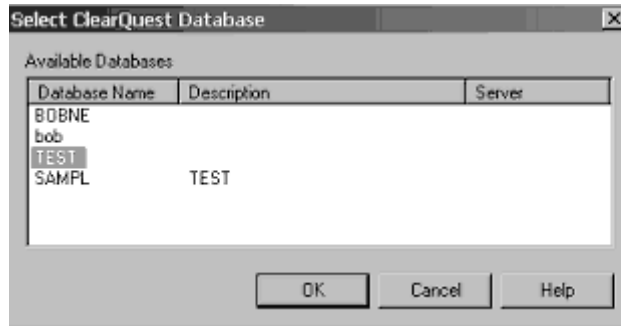
- 1 Follow the steps in *Configuring the Rational Project* on page 29 to display and work with the **Configure Project** dialog box.
- 2 In the **Configure Project** dialog box, click **Select** in the Change Requests area.
- 3 In the **Select Connection Name** dialog box (Figure 7), select the database connection associated with the ClearQuest database you want to work with. Click **OK**.

Figure 7 The Select Connection Name dialog box



- 4 In the **Select ClearQuest Database** dialog box (Figure 8), select the database you want to associate with the Rational project by clicking the appropriate **Database Name**. Click **OK**.

Figure 8 The Select ClearQuest Database dialog box



Your ClearQuest database is now associated with your Rational project, with your desired connection.

Associating Rose Models

Rational Rose enables visual modeling of architectures, components, and data, automating the process of maintaining consistency between a software model and its implementation. Before you associate Rose models with the project, read *Establishing a Virtual Path Map in Rose* on page 33.

Establishing a Virtual Path Map in Rose

Rose maintains internal absolute pathnames to models and parts of models. This means that to share a Rose model with another developer, you need to use exactly the same paths, including drive letters, to get access to the same Rose model. To work around this restriction, set up a virtual path map as follows:

- 1 Start Rose: click **Start**, then click **Programs > Rational Suite > Rational Rose**.
- 2 Open the Rose model you will be working with.
- 3 From the Rose menu, choose **File > Edit Path Map** to display the Virtual Path Map dialog box.
- 4 On the Virtual Path Map dialog box:
 - a In the Symbol field, type **CURDIR**.
 - b In the Actual Path field, type **&**.
 - c Click **Add**.

The following line appears in the *Virtual Symbol to Actual Path Mapping* list:

\$CURDIR =&

d Click **Close**.

5 Quit Rose.

6 Start Rose again, open the Rose model, and quit Rose.

For more information about virtual path maps, view the Rose help for the Virtual Path Map dialog box.

Associating Rose Files with the Rational Project

To associate an existing Rose model with the Rational project:

- 1** On the Configure Project dialog box, click **Add** in the Models area. The Add Rose Model dialog box appears.
- 2** Navigate to the Rose model you will be working with.

Migrating from Rational Rose to XDE

Using Rational XDE, you can migrate your Rose model (.mdl file) to a XDE model (.mdx file). However, keep in mind that the Rational Administrator offers no support for XDE models.

After migration from Rose to XDE, the Rational Administrator will continue to display the Rose model (.mdl) in the state in which it was migrated to XDE. The newly migrated XDE model (.mdx) is not displayed through the Rational Administrator.

Warning: While it is possible to modify the Rose model (.mdl file) after migration to XDE, we strongly discourage you from doing so, as there is no synchronization between the .mdl and .mdx models. After you migrate your Rose model to XDE, use XDE to manage the model as well as other XDE integrations.

Working with a Rational Project

4

This chapter describes additional administrative tasks you can perform while working with a Rational project.

Connecting to a Rational Project

You must connect to a Rational project before you can configure it, delete it, or manage Rational Test users and groups. After you connect to a Rational project, you can view the properties of the associated datastores, projects, and databases.

To connect to a Rational project:

- 1 From the Rational Administrator menu, click **File > Connect**.
- 2 A list of all Rational projects that are not already connected appear in the Connect dialog box. Select the project you want to connect to and click **OK**.
- 3 If necessary, enter the Rational project's password and click **OK**.

Registering a Rational Project

If you plan to administer a Rational project on a computer other than the one on which it was created, register it. You register the Rational project on the same computer you used to create and configure the project.

- 1 From the Rational Administrator menu, click **File > Register Project**.
- 2 In the Select Rational Project dialog box, navigate to the Rational project and click **Open**.

After a project is registered, the project name appears in the project hierarchy in the Rational Administrator's left pane.

Unregistering a Rational Project

After you no longer need to work with a Rational project, remove the project name and details from the Rational Administrator by unregistering the project. Unregistering a Rational project does not delete it. After you unregister a project, you can register it again and resume using it.

- 1 From the Rational Administrator menu, click **File > Unregister Project**.
- 2 Select the project to unregister and click **OK**.

Working with the Properties of a Rational Project

You can display properties of a Rational project or edit the project password by performing the following steps:

- 1 Connect to the Rational project. See *Connecting to a Rational Project* on page 35.

- 2 Click **Edit > Properties**.

The **General** tab allows you to view, but not edit, the Rational project name and location.

The **Security** tab allows you to modify the Rational project's password.

- 3 View or modify properties and click **OK**.
- 4 To view your changes, click **View > Refresh**, or disconnect and reconnect to the project.

Disconnecting from a Rational Project

After you finish working with a Rational project, you can disconnect from it. Disconnecting from the project, and then reconnecting to the project, allows you to view changes you may have made to project properties.

- 1 From the Rational Administrator menu, click **File > Disconnect**.
- 2 A list of Rational projects that are registered and connected appear in the Disconnect dialog box. Select the Rational project from which to disconnect and click **OK**.

Relocating a Rational Project

Rational projects contain associations to other artifacts, such as RequisitePro projects and Rose Models. Therefore, it is critical that the location of the project remain the same. Sometimes, however, you may find it necessary to relocate a Rational project.

Some possible reasons for relocating your project are:

- You are retiring a server that contains the Rational project (.rsp) file.
- You are moving the project from a server that may have data integrity problems.

- You are consolidating your installation's architectural configuration.

Note: You cannot relocate a UCM-enabled Rational project with this procedure.

Preparing to Relocate a Rational Project

Before you start to relocate your Rational project, follow these steps:

- 1 Select the ultimate destination for your Rational project. Ensure the destination computer you select will be stable and accessible to all who use the Rational project.

- 2 Create a shared directory on the computer (see *Creating a Shared Directory* on page 27). Your Rational project will eventually reside in this directory.

Record the name of the directory you create in the following space for later reference: _____

- 3 Create a new directory with a unique name, in the shared directory you created in Step 2. The name should be different from your existing Rational project. Your new Rational project will have this same name.

Record the name of the directory you create in the following space for later reference: _____

- 4 Find the location of your existing Rational project (.rsp) file. It is most likely in a shared directory you have created in the following directory structure:

`\\computer-name\shared-directory-name\Rational-project-name\project.rsp`

where:

- *computer-name* is the name of the computer where your Rational project is currently located
- *shared-directory-name* is the name of the shared directory where your Rational project is currently located
- *Rational-project-name* is the name of the directory where your Rational project is currently located. The Administrator names this directory after your Rational project name.
- *project.rsp* is the name of your Rational project.

Record the location of your existing Rational project for later reference:

-
- 5 Using Windows, copy the *Rational-project-name* directory (not just the Rational project file) to a removable storage location (floppy disk, CD, and so on) for backup and recovery purposes.

Note: It is important to note where you store this directory. You will need it later in this procedure.

- 6 To relocate your Rational project, you must relocate each associated artifact. You can determine which artifacts are associated with your Rational project from the Details Pane (right pane) of the Administrator.

Overview of Relocating a Rational Project

To relocate your Rational project, perform the following steps:

- 1 Relocate the RequisitePro project.
- 2 Delete the old Rational project.
- 3 Create the new Rational project.
- 4 Associate the relocated RequisitePro project with the new Rational project.
- 5 Associate Test artifacts with the new Rational project.
- 6 If needed, relocate your ClearQuest database.
- 7 Associate your ClearQuest Database with the new Rational project.
- 8 Associate Rose models with the new Rational project.

Relocating the RequisitePro Project

If a RequisitePro project is associated with your Rational project, follow these steps to relocate it. Otherwise, skip to *Deleting the Old Rational Project* on page 39.

- 1 Locate your RequisitePro project (.rqs) file. It is most likely in a shared directory you have created (see *Creating a Shared Directory* on page 27) in the following directory structure:

```
\\computer-name\shared-directory-name\Rational-project-name\RequisitePro-project-name\RequisitePro-project.rqs
```

where:

- *computer-name* is the name of the computer where your Rational project is currently located.
- *shared-directory-name* is the name of the shared directory where your Rational project is currently located.
- *Rational-project-name* is the name of the directory where your Rational project is currently located. The Administrator names this directory after your Rational project name.
- *RequisitePro-project-name* is the name of the directory where your RequisitePro project is currently located. You named the project when you created it with the RequisitePro Create Project Wizard (launched from the Administrator).
- *RequisitePro-project.rqs* is the name of your RequisitePro project.

In addition, your destination directory must retain the same directory structure.

- 2 Relocate your RequisitePro project with the appropriate procedure in Table 5.

The procedure you select depends on the vendor database you use with RequisitePro. Make sure your database administrator and RequisitePro administrator are aware of your intentions to move the RequisitePro project.

Table 5 Relocating a RequisitePro project based on vendor database

| Vendor database used with RequisitePro | Procedure to move your RequisitePro project |
|--|--|
| Microsoft Access | <p>Copy the <i>RequisitePro-project-name</i> directory containing your RequisitePro project to the final destination you selected in <i>Preparing to Relocate a Rational Project</i> on page 37.</p> <p>Ensure you copy the entire <i>RequisitePro-project-name</i> directory and not just the RequisitePro project file within the directory.</p> |
| Microsoft SQL Server | <p>There are different procedures to follow depending on whether you relocate the RequisitePro project to the same computer, or to another computer. Contact Rational Customer Support for the latest procedures for moving a RequisitePro project in a Microsoft SQL Server environment.</p> |
| Oracle | <p>Contact Rational Customer Support for the latest procedures for moving a RequisitePro project in an Oracle environment.</p> |

Deleting the Old Rational Project

Ensure you have backed up the Rational project directory and followed the steps in *Preparing to Relocate a Rational Project* on page 37 before proceeding to delete the project from its current location.

To delete the project:

- 1 From the Rational Administrator, select the project you want to delete in the project (left) pane.
- 2 From the menu, click **File > Delete Project**.
- 3 To delete the project, click **OK**.

Creating the New Rational Project

After you delete the original Rational project, create another one with a unique name. Follow these steps to create and configure a new project.

- 1 From the Rational Administrator, click **File > New Project**. The New Project - General dialog box appears.
- 2 In the Project Name field, enter the unique directory name that you entered in Step 3 of the section *Preparing to Relocate a Rational Project* on page 37.

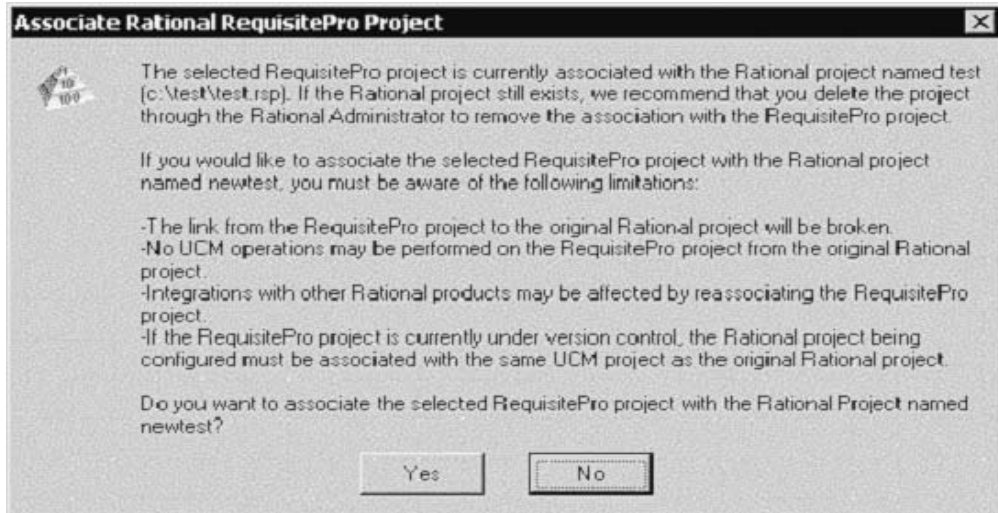
In the Project Location field, enter the UNC pathname of the destination directory you created in *Preparing to Relocate a Rational Project* on page 37 (for example, \\computer-name\shared-directory-name\unique-directory-name). Click **Next**.
- 3 Optionally, enter a password for the project. Click **Next**.
- 4 Review the summary on the New Project - Summary screen. If the summary is correct, select the Configure Project Now check box and click **Finish**. If not, click **Cancel** and recreate the project.

Associating the RequisitePro Project With the New Rational Project

Follow these steps to associate the RequisitePro project that you moved in *Relocating the RequisitePro Project* on page 38 with the new Rational project.

- 1 In the left pane of the Rational Administrator, select the Rational project you created in *Creating the New Rational Project* on page 39.
- 2 Click **File > Configure Project**.
- 3 In the Configure Project dialog box, in the Requirements Assets area, click **Select**.
- 4 In the Select RequisitePro Project File dialog box, navigate to the RequisitePro project that you moved in *Relocating the RequisitePro Project* on page 38, select it, and click **Open**.
- 5 The Associate Rational RequisitePro Project dialog box in Figure 9 is displayed. Click **Yes** to associate the RequisitePro project with the new Rational project.

Figure 9 The Associate Rational RequisitePro Project dialog box



- 6 In the Associate Rational RequisitePro Project dialog box, click **Close** to complete the association.

The RequisitePro project is now associated with the Rational project.

Associating Test Artifacts With the New Rational Project

To associate Test artifacts with the Rational project you created in *Creating the New Rational Project* on page 39, you must:

- Create Test assets from an existing test datastore, and associate them to the new Rational project.
- Associate existing users and groups to the new Rational project.

Creating Test Assets For the New Rational Project

Follow these steps to create a new test datastore from an existing test datastore, and associate it with the new Rational project.

- 1 In the left pane of the Rational Administrator, select the Rational project you created in *Creating the New Rational Project* on page 39.
- 2 Click **File > Configure Project**.
- 3 In the Configure Project dialog box, in the Test Assets area, click **Create**.
- 4 On the first page of the wizard, select the vendor database you want to work with. Click **Next**.

- 5 Complete the second page of the wizard with the UNC pathname of the test datastore you want to create (for example, \\computerA\project-directory\tests) and other information specific to the vendor database you chose in Step 4. Click **Next**.
- 6 On the third page of the wizard, select the **Initialize Assets from the following Test Datastore** check box. Navigate to the directory in which you copied your old Rational project for backup purposes (see Step 5 in *Preparing to Relocate a Rational Project* on page 37). Locate and select your old test datastore.
- 7 Next, on the same wizard page, select the **Initialize Users and Groups from the Rational Project** check box. Navigate to the directory in which you copied your old Rational project for backup purposes (see Step 5 in *Preparing to Relocate a Rational Project* on page 37). Locate and select your old Rational project.
- 8 Click **Next** to display the Summary page.
- 9 Click **Finish** to complete the wizard.

Your new test datastore has been successfully created using your old test datastore, and is now associated with your new Rational project. In addition, the users and groups you created with your old Rational project are now associated with your new Rational project.

Relocating Your ClearQuest Database

You are not required to relocate your ClearQuest database when you change the location of a Rational project, except in the following cases:

- Your Rational project and all associated artifacts reside on a single local computer.
- Your ClearQuest database resides on a server that you will no longer use.

If you need to move your ClearQuest database, use the ClearQuest Designer. For information on moving the database, see the *Rational ClearQuest Administrator's Guide*.

Associating the ClearQuest Database With the New Rational Project

Follow these steps to associate the ClearQuest database that you use with your old Rational project to the new Rational project you just created.

- 1 In the left pane of the Rational Administrator, select the new Rational project you created in *Creating the New Rational Project* on page 39.
- 2 Click **File > Configure Project**.
- 3 In the Configure Project dialog box, in the Change Requests area, click **Select**.
- 4 In the Select Connection Name dialog box, select your database connection.
- 5 In the Select ClearQuest Database Name dialog box, select the name of the ClearQuest database you used with your old Rational project.

6 Click **OK**.

Your ClearQuest database is now associated with your new Rational project.

Associating Rose Models With the New Rational Project

Follow these steps to associate the Rose models you used with your old Rational project to the new Rational project you just created.

- 1 In the left pane of the Rational Administrator, select the new Rational project you created in *Creating the New Rational Project* on page 39.
- 2 Click **File > Configure Project**.
- 3 In the Configure Project dialog box, in the Models area, click **Add**.
- 4 In the Add Rose Model dialog box, navigate to the location of the models associated with your old Rational project. Select the models you wish to associate with your new Rational project.
- 5 Click **Open**.

Your Rose models are now associated with your new Rational project.

Deleting a Rational Project

There may be times when you wish to delete a Rational project. As artifacts that are associated with the Rational project become obsolete or change location, it may be easier to delete the project and create a new one.

Note: Do not use Windows Explorer or any other program to delete a Rational project. Always use the Rational Administrator.

Before you delete a Rational project:

- Consider carefully the effects of deleting the project. Are there any integrations between Rational Suite artifacts that need to be preserved? Do you have a recovery plan in place, if needed?
- Communicate your intention to delete the project with all members of your team, especially those responsible for maintaining other Rational products.
- Make a backup copy of the Rational project.

When you delete a Rational project:

- The project is unregistered.
- The associations among the various projects, datastores, and databases are removed, but the artifacts themselves are not removed.
- The project is permanently deleted.

To permanently delete a Rational project, follow these steps:

- 1 From the Rational Administrator, select the project you want to delete in the project (left) pane.
- 2 From the menu, click **File > Delete Project**.
- 3 To delete the project, click **OK**.

Working with ClearQuest MultiSite

You can use ClearQuest MultiSite to share access to a ClearQuest database among multiple sites by creating replicas of the database.

If you have a replicated ClearQuest database, you can configure Rational projects only if your current replica masters the RA_Project record.

Working with SQL Anywhere

From the Rational Administrator, you may access Sybase Central and ISQL, Sybase tools that enable you to work with a SQL Anywhere database.

Sybase Central

Use the Sybase Central tool to perform Sybase SQL Anywhere functions, such as creating, backing up, and compressing a SQL Anywhere database.

To use the Sybase Central tool, click **Tools > Sybase Central**.

ISQL

Use the ISQL tool to generate interactive SQL queries on an SQL Anywhere database.

To use the ISQL tool, click **Tools > ISQL**.

For more information about using Sybase Central or ISQL, see the Sybase Central database management tool Help.

Managing Test Users and Groups

5

This chapter provides information about Rational Test users and groups. This chapter helps you:

- Understand the structure of Rational Test users and groups
- Administer Rational Test users, groups, and assets

Understanding Rational Test Users and Groups

This section describes Test users and groups. This information is a prerequisite for administering Test users, groups, and associated assets.

Test Users

Test users are typically the QA managers, developers, and test engineers who use Rational Test components to create, edit, run, monitor, analyze, and manage test scripts.

For each test user, you can specify:

- User ID
- Password
- First name
- Last name
- Company
- Title
- Department
- Phone number
- E-mail address

You can set the Rational test datastore privileges for a test user to create, modify and delete:

- Test planning assets
- Test implementation assets
- Test execution assets
- Test results analysis assets

Test Groups

You set privileges for groups of users (called *test groups*), then assign privileges to each user by adding the user to a test group. When you add a test user to a test group, the test user acquires the privileges of that test group. A test user can be a member of one or more test groups.

You can define any test group as a *default group*, and you can also create multiple default groups. Every test user that you create acquires the privileges of the default groups.

When you create a Rational project using the Rational Administrator, a Test Users folder and a Test Groups folder is created by default. This folder appears in the left pane of the Rational Administrator window, under the Rational test datastore object.

Admin Test User

When you create the Rational test datastore, the *Admin Test User* is also created. The Admin Test User is located within the Test Users folder. The Admin Test User is not a member of any specific test group and takes on all available privileges.

The Admin Test User can:

- Create, modify, and delete test assets, reports, builds and logs.
- Customize test assets and builds.

Admin Test Security

There is no default password for the Admin Test User. You can log in as an Admin Test User without using a password. This lets you log into any Rational Test component after you first install the software.

When you connect to a project for the first time, you should define a password for the Admin Test User to prevent unauthorized access. The Admin Test User always has full test user access privileges and cannot be deleted from a project.

Administering Test Users and Groups

Use the following procedures to administer and maintain users and groups for the Rational test datastores you have defined.

Adding a Test Group or Test User

You must have Admin Test User privileges to add a Test group or Test user. To add a test group or test user to a Rational test datastore:

- 1 Use the Rational Administrator to connect to the project. From the Rational Administrator menu, click **File > Connect**. Select the project name and click **OK**.
- 2 To add a Test group:
 - a Click **Insert > Test Group**.
 - b A dialog box displays a list of all connected projects. Select the project to add a test group to, and click **OK**.
The Insert Test Group dialog box opens.
 - c Type a name and description for the group.
 - d Optionally, click **Set as default group** to set a test group as a default group for all test users you will add to the project.
 - e Set the privileges for the Test group by selecting or clearing the appropriate check boxes.
 - **Write Privileges** – Select the appropriate check boxes to give privileges to a group to create, modify, or delete Test planning assets, Test implementation assets, Test execution assets, and Test results analysis assets.
 - **Administration Privileges** – Select the appropriate check boxes to give privileges to a Test group to customize Test assets. Test assets include scripts and suites.

See Table 6 for examples of types of Test assets.

Table 6 Examples of Test Assets

| Test Asset Types | Examples |
|------------------------------|--|
| Test planning assets | Test plans and iterations of plans |
| Test implementation assets | Tools used in the implementation of test plans |
| Test execution assets | Suites, computers, and computer lists |
| Test results analysis assets | Build results, test log folders, and test logs |

- f Click **OK**.
- 3 To add a Test user:
 - a Click **Insert > Test User**.
 - b A dialog box displays a list of all connected projects. Select the project to add a Test user to, and click **OK**.
The Insert Test User dialog box opens.

- c On the General tab, type the user's information.
- d On the Groups tab, add to or remove users from the available groups.
- e Click **OK**.

Modifying a Test Group or Test User

You must have Admin Test User privileges to modify a test group. To modify existing test group information:

- 1 From the Rational Administrator menu, connect to the project. Click **File > Connect**. Select the project name and click **OK**.
- 2 If Test Groups or Test Users are not listed in the left pane of the main window, double-click the Rational test datastore object.
- 3 If the test group or user that you want to modify is not listed, double-click Test Groups or Test Users, respectively, to display all groups or users.
- 4 Select the test group or test user to modify.
- 5 Click **Edit > Properties**.
- 6 Change the test group or test user information on the appropriate tabs.
- 7 Click **OK**.

Deleting a Test Group or Test User

When you delete a test group, you delete the group privileges for any test users in the deleted group. Deleting a Test group does not delete Test users.

To delete a test group or test user from a Rational test datastore:

- 1 Use the Rational Administrator to connect to the project. From the Rational Administrator menu, connect to the project. Click **File > Connect**. Select the project name and click **OK**.
- 2 If Test Groups or Test Users are not listed in the left pane of the main window, double-click the Rational test datastore object.
- 3 If the test group or test user that you want to delete is not listed, double-click **Test Groups** or **Test Users** to display all groups or users respectively.
- 4 Select the test group or test user to delete, then click **Edit > Delete**.
The Rational Administrator prompts you to confirm the deletion.
- 5 Click **Yes**.

Changing a Password for a Test User

Follow these steps to change a password for a test user:

- 1 In the left pane of the Rational Administrator main window, double-click **Rational Test Datastore**.
- 2 Double-click **Test Users** to display all test users.
- 3 Select the user name of the password that you want to change.
- 4 Click **Edit > Properties**.
- 5 On the **General** tab of the Properties box, select the original password in the **Password** box, then type a new password.

Passwords are alphanumeric strings (ASCII characters only) of up to 20 characters and are case-sensitive. Non-ASCII characters, such as accented letters, are not supported in the password field.

- 6 Click **OK**.

Configuring the Integration for ClearQuest and RequisitePro

6

This chapter shows how to configure the integration of Rational ClearQuest and Rational RequisitePro. This integration allows you to associate ClearQuest records with RequisitePro requirements.

To learn about using the integration between RequisitePro and ClearQuest, refer to *Getting Started: Rational Suite AnalystStudio* provided on your documentation CD.

How to Use this Chapter

| If you are | Then |
|---|--|
| Setting up a Rational Administrator Project before configuring the integration. | Follow the instructions in <i>Configuring the Rational Administrator Project</i> on page 53. |
| Testing your ClearQuest schema and RequisitePro project for the availability of typical and custom setup types. | Follow the instructions in the section <i>Testing Your ClearQuest Schema and RequisitePro Project</i> on page 53. |
| Setting up a new integration using typical record and requirement types (recommended for inexperienced users.) | Follow the instructions in the section <i>Setting Up a Typical Integration</i> on page 54. |
| Setting up a new integration using custom record and requirement types (recommended for experienced users). | Follow the instructions in the section <i>Setting Up a Custom Integration</i> on page 55. |
| Using a ClearQuest database with hidden records. | See <i>Maintaining Record Visibility</i> on page 58. |
| Working in a ClearQuest MultiSite environment. | See <i>Using the Integration with ClearQuest MultiSite</i> on page 58. |
| Reconfiguring or repairing existing integration associations. | Ensure that you have upgraded all Rational products, databases, schemas, and projects according to the instructions in this document, then follow the instructions in the section <i>Repairing and Reconfiguring the Integration</i> on page 59. |

Overview of the Configuration Process

To configure the integration, perform the following steps:

- 1 Plan the configuration; decide if you want to use the **Typical** or **Custom** setup type.
- 2 Configure a Rational project to associate your ClearQuest database and your RequisitePro Project.
- 3 Use the RequisitePro-ClearQuest Integration Wizard to test your project.
- 4 If necessary, configure your ClearQuest schema and RequisitePro project to resolve any problems found during the test.
- 5 Use the RequisitePro-ClearQuest Integration Wizard to set up the integration.

Overview of the RequisitePro-ClearQuest Integration Wizard

The RequisitePro-ClearQuest Integration Wizard provides an easy way to set up new integrations and reconfigure or repair existing integrations. The wizard also tests and verifies databases, projects, and associations to help you troubleshoot problems with new and existing integrations.

The wizard replaces the ASCQISetup.bat and ASCQISetup.exe files used to configure the integration in earlier versions of Rational Software. If you have an existing integration, you can continue to use ASCQISetup.bat and ASCQISetup.exe to modify the integration, or you can use the wizard to make changes.

Planning: Deciding to Use Typical or Custom Setup Type

Before you configure your integration, you must decide if you want to customize the integration or use the typical settings in the ClearQuest schema and RequisitePro project templates provided by Rational Software.

Typical Setup Type

In a typical integration, the *Defect* record type and the *EnhancementRequest* record type in ClearQuest are associated with the FEAT requirement type in RequisitePro. The FEAT requirement type has two attributes, *Defect* and *EnhancementRequest*. Choose the typical setup type if you are an inexperienced user or if you do not need to use any custom record or requirement types in the integration.

Custom Setup Type

A custom integration can associate any record type(s) with any requirement type(s). Choose the custom setup type if you are an experienced user and you need to use special record and requirement types in the integration.

Configuring the Rational Administrator Project

To enable the integration, you must create a Rational Administrator project which associates a ClearQuest database and a RequisitePro project. If your ClearQuest database and RequisitePro project are not associated with a Rational project, use the Rational Administrator to create a project. When configuring the Rational project, select the ClearQuest database and the RequisitePro project that you want to use for the integration. For more information, see *Creating and Configuring a Rational Project* on page 27 or see Rational Administrator Help.

If you receive an error message when you try to configure a Rational Administrator project, see *Repairing Rational Administrator Project Problems* on page 59.

Testing Your ClearQuest Schema and RequisitePro Project

You can test your ClearQuest schema and RequisitePro project using the RequisitePro-ClearQuest Integration Wizard. The wizard checks for the presence of the record types, requirement types, and attributes necessary to the custom and typical setup types.

- 1 Start Rational Administrator.
- 2 Right-click on the Rational Project containing your ClearQuest database and RequisitePro project and select **RequisitePro-ClearQuest Integration**.
- 3 On the **Choose Setup Type** page, review the available setup types. If the setup type you want to use is available, you can continue with the wizard.
- 4 If one or both setup types are unavailable, the wizard produces a configuration report explaining which requirement types, record types, or attributes are missing or mis-configured. You can view and save this report by selecting **Integration Status**.

Configure your ClearQuest database and/or RequisitePro project according to the configuration report, depending on the kind of integration setup type you want. If you want a typical setup type, make sure your project conforms to the settings described in *Setting Up a Typical Integration* on page 54. If you want a custom setup type, make sure your project conforms to the settings described in *Setting Up a Custom Integration* on page 55.

Setting Up a Typical Integration

To set up a typical integration, you must create a ClearQuest database and a RequisitePro project, and associate them to each other in a Rational Administrator project. If you have not yet created your ClearQuest database or your RequisitePro project, read this section for information on which schemas and templates to use.

If you have already created your ClearQuest database and RequisitePro project, you can quickly test whether the typical setup type is available by using the wizard. The wizard checks the database and project for the availability of typical record and requirement types.

Configuring the ClearQuest Schema

To configure your ClearQuest schema for a typical integration, create your database using one of the following packaged schemas provided with ClearQuest:

- Rational Suite AnalystStudio schema
- Rational Suite DevelopmentStudio schema
- Rational Suite Enterprise schema
- Rational Suite TestStudio schema

Or use a custom schema containing the following:

- A *Defect* record type with a **Submit** form and a **Record** form.
- An *EnhancementRequest* record type with a **Submit** form and a **Record** form.

Each record type must have the following actions of the appropriate type:

| Action | Type |
|--------|------------------|
| Submit | State transition |
| Open | State transition |
| Close | State transition |
| Modify | Modify |

If you have created your ClearQuest database using a custom schema or the *Blank* schema, your ClearQuest database may lack the record types, actions, and states necessary for the typical setup type.

For more information on how to create record types, actions, and states in ClearQuest, refer to ClearQuest Designer Help.

Configuring the RequisitePro project

To configure your RequisitePro project for a typical integration, create your project from one of the following project templates provided with RequisitePro:

- Composite Template
- Traditional Template
- Use-Case Template

Or use a project containing a requirement type with prefix FEAT and two attributes of the ClearQuest Integration type: *Defect* and *EnhancementRequest*.

If you created your RequisitePro project using a custom template or the *Blank* template, your project may lack the appropriate requirement type and attributes necessary for the typical setup type.

For more information on how to create requirement and attribute types, refer to *Working with Requirement Types* in RequisitePro Help.

Setting up the Configuration

After your ClearQuest database and RequisitePro project are associated with a single Rational Administrator project, use the RequisitePro-ClearQuest Integration Wizard to set up your associations.

- 1 Start Rational Administrator.
- 2 Right-click on the Rational Project containing your ClearQuest database and RequisitePro project and select **RequisitePro-ClearQuest Integration**.
- 3 On the **Choose Setup Type** page, select **Typical** setup type.

If **Typical** is unavailable, you must add the typical record and requirement types detailed below to your database and project before you can set up a typical integration.

Setting Up a Custom Integration

To set up a custom integration, you must create a ClearQuest database and a RequisitePro project, and associate them to each other in a Rational Administrator project. If you have not yet created your ClearQuest database or your RequisitePro project, read this section for information on which schemas and templates to use.

If you have already created your ClearQuest database and RequisitePro project, you can quickly test whether the custom setup type is available by using the wizard. The wizard checks the database and project for the availability of typical record and requirement types. For more information, see *Testing Your ClearQuest Schema and RequisitePro Project* on page 29.

Setting Up the ClearQuest Schema

Your schema must have the most recent version of the RequisitePro and Repository packages applied to the schema. If you have not applied these packages, Rational Administrator prevents you from associating the ClearQuest project to a RequisitePro project.

Your schema must have at least one record type, and it must have a Back Reference field on the **Requirements_List** (or a custom list) field for each record type you want to associate to a requirement type.

To add a Back Reference field to your schema, perform the following steps:

- 1 In the ClearQuest Designer, click **File > Open Schema**. The Open Schema dialog box appears.
- 2 Select the option **Checkout a schema to edit**.
- 3 Select your schema from the list and click **Next**. Click **Finish**.
- 4 In the schema browser, open the **Record Types** folder.
- 5 In a record type you selected when you applied the RequisitePro package, double-click **Fields**. The list of fields appears.
- 6 Right-click the **Requirements_List** field name and select **Field Properties**. The **Properties** dialog box appears.
- 7 At the **Back Reference** field, type the name of the appropriate record type, such as `EnhancementRequests_List`. For some schemas, this field may already contain a value. In some cases this field may be read-only. If so, no action is required.
- 8 Close the **Properties** dialog box.
- 9 Repeat steps 5–8 for each of the record types you selected when you applied the RequisitePro package.
- 10 Click **File > Check In**. ClearQuest validates the schema and displays a Check In dialog box.
- 11 Type a comment describing the schema changes and click **OK**.

To apply the changes you have made to your packages to the ClearQuest user database:

- 1 Back up your database.
- 2 From the ClearQuest Designer menu, select **Database > Upgrade Database** and click **Yes** to continue.
- 3 In the **Upgrade Database** window, select the database instance that is included in your Rational project. Click **Next**.
- 4 Select the latest version of the schema (the schema with the highest version number). Click **Finish**.
- 5 Click **OK** and close the ClearQuest Designer.

Your ClearQuest database is now upgraded to use the current integration between RequisitePro and ClearQuest.

For more information on how to create record types, actions, and states in ClearQuest, refer to ClearQuest Designer Help.

Setting up the RequisitePro Project

The RequisitePro project must have at least one requirement type with at least one attribute of the ClearQuest integration type.

For more information on how to create requirement and attribute types, refer to *Working with Requirement Types* in RequisitePro Help.

Setting up the Configuration

After your ClearQuest database and RequisitePro project are associated with a single Rational project, use the RequisitePro-ClearQuest Integration Wizard to set up your associations.

- 1 Start Rational Administrator.
- 2 Right-click on the Rational Project containing your ClearQuest database and RequisitePro project and select **RequisitePro-ClearQuest Integration**.
- 3 On the **Choose Setup Type** page, select **Custom** setup type.

If **Custom** is unavailable, you cannot set up any integration between the ClearQuest database and RequisitePro project. You must add the record types, requirement types, and attributes to your database and project before you can set up the integration. Choose **Integration Status** for information on which record types, requirement types, or attributes are missing.

- 4 On the Configure Associations page, select requirement types, record types, and attributes for your integration.

- 5 The remaining steps of the wizard prompt you to review and confirm your decisions before committing them. To make changes to your integration later, follow the steps in *Reconfiguring an Existing Integration* on page 61.

Maintaining Record Visibility

The ClearQuest record visibility feature allows you to limit access to certain ClearQuest records. This limited access applies to selected ClearQuest user groups, and is based on criteria defined by an administrator. The criteria specify that records are visible for a user group depending on the value of a specific ClearQuest reference field. To use the integration between RequisitePro and ClearQuest, RequisitePro users must have record visibility throughout the life of all integrated records.

We recommend that you define record visibility for user groups based on the value of the RASProject field, which is required for integration with RequisitePro. If you use this criterion, you preserve the integration between RequisitePro and ClearQuest, because you cannot change the value of the RASProject field without first removing all associations to RequisitePro requirements. In addition, this criterion ensures that all RequisitePro project users have visibility for the same ClearQuest records.

Using the Integration with ClearQuest MultiSite

When you use the integration between RequisitePro and ClearQuest within a ClearQuest MultiSite environment, you must set up the integration individually at each different site. You can enable the integration with the originating ClearQuest schema repository and user database, or with a local replica. To integrate with any ClearQuest database, that database must have mastership of the RASProject record and of the ClearQuest records you want to associate.

To save time, we recommend that you create a query that filters records in your ClearQuest database by mastership. Use it to screen records before associating them with requirements in the **Associate [ClearQuest Record Type]** dialog box. To create this query, click **Build Query** in the dialog box. For more information, see the dialog box Help.

To set up the integration with ClearQuest MultiSite, perform the following steps:

- 1 Create and configure a separate local RequisitePro project at each site.
- 2 Create and configure a separate Rational Administrator Project at each site which associates the ClearQuest MultiSite database with the local RequisitePro project.

Note: You can associate each ClearQuest record with only one requirement at a time, even if the ClearQuest database containing that record is associated with multiple RequisitePro projects.

When you are configuring the integration in a MultiSite Environment, you may need to use the ClearQuest Maintenance Tool to specify which schema repository you are using. Always use a connection to the appropriate schema repository that matches the default local registry key, **2003.06.00**.

Note: For more information, see the *Rational ClearQuest MultiSite Administrator's Guide* on the Rational Solutions for Windows Products Online Documentation CD.

Repairing and Reconfiguring the Integration

This section describes how to troubleshoot new and existing integrations. Consult the table below for information on how to use this section:

| If you are | Then |
|---|---|
| Receiving an error message when you try to associate a ClearQuest database to a RequisitePro project in Rational Administrator. | Follow the procedures described in <i>Repairing Rational Administrator Project Problems</i> on page 59. |
| Repairing an integration that has broken record-requirement associations caused by changes to record types, requirement types, or attributes used by the integration. | Follow the instructions in the section <i>Repairing Invalid Associations</i> on page 60. |
| Changing an existing, functional integration. | Follow the instructions in the section <i>Reconfiguring an Existing Integration</i> on page 61. |

Repairing Rational Administrator Project Problems

If you receive an error message from Rational Administrator related to missing packages, your ClearQuest schema is missing the **Repository** or **RequisitePro** package. You must apply and upgrade the packages before you can associate your ClearQuest database to a RequisitePro project using Rational Administrator.

Applying the Repository and RequisitePro Packages

To apply the Repository and RequisitePro packages:

- 1 From the ClearQuest Designer menu, click **Package > Package Wizard**. The Package Wizard window appears.
- 2 In the **Select a Package** list, select the latest version of the Repository package. Click **OK**.
- 3 In the Package Wizard, click **Next**. Select your schema. Click **Next** again.
- 4 Select all record types that you will use in the integration.
Note: If a previous version of the Repository package has been applied, some record types in your schema may not appear because they have already been selected. We recommend that you select at least **Defect** and **EnhancementRequest**, if they are present.
- 5 Click **Finish**.
- 6 Repeat steps 1–6 for the RequisitePro package.
- 7 From the ClearQuest menu, select **File > Checkin** to check in the schema. Click **OK** after verifying your choice. Click **OK** again in the **ClearQuest Checkin Confirmation** dialog box.

Repairing Invalid Associations

After an integration is successfully set up, changes you make to requirement types, record types, and attributes can cause some or all of the associations that enable the integration to become invalid. You can repair these associations by restoring your requirement types, record types, or attributes to their original state, or by using the wizard to repair the associations.

To repair invalid associations using the wizard, take the following steps:

- 1 Start Rational Administrator.
- 2 Right-click the Rational Project containing your existing integration and select **RequisitePro-ClearQuest Integration**.
- 3 On the **Choose Setup Type** page, select **Specify the requirement and record types used by the integration or repair or reconfigure my current integration**.
- 4 On the **Configure Associations** page, add, delete, or modify associations marked **Invalid** in the associations pane.
- 5 Review and confirm your changes.

Reconfiguring an Existing Integration

To reconfigure an existing integration, use the RequisitePro-ClearQuest Integration Wizard.

Reconfiguring Existing Associations with Custom Associations

To reconfigure existing associations with custom associations, take the following steps:

- 1 Start Rational Administrator.
- 2 Right-click the Rational Project containing your existing integration and select **RequisitePro-ClearQuest Integration**.
- 3 On the **Choose Setup Type** page, select **Specify the requirement and record types used by the integration or repair or reconfigure my current integration**.
- 4 On the **Configure Associations** page, add, delete, or modify associations in the associations pane.
- 5 Review and confirm your changes.

Overwriting Existing Associations with Typical Associations

To reconfigure an existing integration with typical integration settings, your ClearQuest database and RequisitePro project must contain all the typical record types, requirement types, and attributes described in *Typical Setup Type* on page 52. The wizard will test for these conditions before allowing you to overwrite the existing integration.

To overwrite the existing integration with typical integration settings:

- 1 Start Rational Administrator.
- 2 Right-click the Rational Project containing your existing integration and select **RequisitePro-ClearQuest Integration**.
- 3 When prompted, select **Overwrite existing integration associations with Typical setup associations**.

Review and confirm your changes.

This chapter provides information on preliminary troubleshooting and pointers to additional troubleshooting information available throughout the Rational documentation set.

Troubleshooting Guide

Table 7 lists common symptoms and possible problems and solutions. If you are unsure of how to resolve a problem, call Rational Customer Support before proceeding. See *Before Calling Technical Support* on page 65 for more information.

Table 7 Troubleshooting Guide

| Symptom | Possible Problem | Possible Solution |
|---|---|--|
| You receive the "Unable to access ClearQuest database" message when configuring a Rational project that includes a ClearQuest database. | The license server is unavailable or you have an invalid license. | Check your licensing status. Ensure you have a valid license. |
| During testing, your datastore sometimes does not properly connect, the reported test data is inconsistent, or some test data is lost. | Your test datastore may be corrupted. | Run the Datastore Doctor on the test datastore to verify its structure and correct any inconsistencies. For more information on the Datastore Doctor, see the online Help. |

Troubleshooting Integrations with Rational ClearQuest

Many Rational tools have integrations with Rational ClearQuest.

To enable the integration, you either use a specialized ClearQuest schema, or apply a ClearQuest package to your existing schema. In some cases, you then perform additional tasks.

Troubleshooting Missing Packages Errors

If you are missing required integration packages, associating a ClearQuest database with Rational projects containing Test and RequisitePro artifacts results in the following error message:

“The schema you have selected needs to be modified to support integrations. One or more ClearQuest packages need to be applied to your schema before you can configure or use this Rational project.”

Using the ClearQuest Designer, apply the appropriate ClearQuest packages listed in Table 8.

Your user database can now be associated with your Rational project.

Table 8 Packages Needed for ClearQuest User Database Integrations

| If your Rational project | To associate the Rational project with a ClearQuest user database, you must apply |
|---------------------------------|---|
| Contains Test artifacts | TeamTest and Repository packages. |
| Contains RequisitePro artifacts | RequisitePro and Repository packages. |
| Is UCM-enabled | UnifiedChangeManagement, UCMPolicyScripts, and AMStateTypes packages. |

For more information about applying packages and enabling integrations with ClearQuest, see the *Rational ClearQuest Administrator's Guide*.

Note: When you customize a ClearQuest package or schema, you can sometimes unintentionally disable either the integration you are trying to achieve or the integrations between other Rational products. Customize packages or schemas only as directed by Rational Technical and Field Engineers. If you have questions, contact Technical Support before proceeding.

Data Code Pages: Character Set Compatibility with ClearQuest

You may see an error message about data code pages if your Rational project is integrated with ClearQuest. The error message appears when you enter data into a tool and the characters you use are incompatible with the set of characters that a ClearQuest database accepts.

For example, say that you are working in a RequisitePro project that is integrated with a ClearQuest database, and the ClearQuest database accepts characters in English only. If you use English to enter RequisitePro data, the error message does not appear. However, the error message does appear if you use another character set, such as Japanese or Chinese.

If you see this error message, consult with your ClearQuest administrator or systems administrator to resolve the character set incompatibility.

Before Calling Technical Support

Before calling Rational Customer Support, be prepared to provide the information listed in *Contacting Rational Customer Support* on page xi. In addition, you may be asked to provide the following information:

- Information on upgrades you have installed
- Database products you have installed and release levels of the products
- Your license information
 - What is your license key?
 - Is the license active?
- Information on debugging tools you have used (for example, CQ Trace)
- Information about project artifacts (Rational projects, test datastores, ClearQuest databases, Rose Models, RequisitePro projects, and so forth)
 - In which product and product release were the artifacts created?
 - Do the artifacts reside on a local computer or on the network?
 - If the artifacts reside on a network, are the computers resident in the same domain, or in different subnet groups?
 - Were the artifacts backed up prior to being upgraded?
 - What upgrade procedures were followed? In which documentation?
- A copy of the Rational project (.rsp file)

Use the Search or Find functionality of your Windows system find the file, or ask your Technical Support representative to help you.

- If the problem involves ClearQuest, a copy of the Tracking CQ.dat file

Use the Search or Find functionality of your Windows system find the file, or ask your Technical Support representative to help you.

For More Troubleshooting Information

Table 9 provides information on troubleshooting other Rational products.

Table 9 Rational Troubleshooting Information

| Topic | Source of Troubleshooting Information |
|------------------------------|--|
| Rational Suite licenses | “Troubleshooting Licenses” chapter of <i>Rational Suite License Management Guide</i> |
| Rational Suite installations | “Troubleshooting” chapter of <i>Rational Software Server Products Installation Guide</i> |
| ClearCase LT Administration | “Troubleshooting” chapter of <i>Rational ClearCase Administrator’s Guide</i> |
| RequisitePro use | “Troubleshooting” chapter of <i>Rational RequisitePro User’s Guide</i> |

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