

Rational Portfolio Manager Installation Instructions

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Rational Portfolio Manager Introduction

This document provides installation instructions of Rational Portfolio Manager for new and existing Rational Portfolio Manager users.

The process is nearly the same for the installation and upgrade of the Rational Portfolio Client. Any differences are noted.

A. Rational Portfolio Manager Installation Instructions

Prerequisites for installing Rational Portfolio Manager

- Windows 2000 or Windows XP
- Pentium II (233 MHz or higher)
- 64 MB of memory
- 60 MB of free space on the hard drive
- Internet Explorer 5.5 or higher
- Internet Access thru phone line or network
- If using the Rational Portfolio Manager import/export function, Microsoft Project 2000, Microsoft Project 2002 and Microsoft Project 2003 are supported. Microsoft Project must be installed before installing Rational PM. Ensure you have the latest drivers for Microsoft Jet and Microsoft Data Access Components (MDAC). You can obtain the MDAC 2.8 driver from the Microsoft downloads website.
- IBM Users: Rational Portfolio Manager is secured by IBM Intranet Password.  [Site Secured by IBM Intranet Password](#)
- External Users: All external Rational Portfolio Manager users need an IBM ID, which is acquired by registering at <https://www.ibm.com/account/profile?page=reg>

IBM Registration for Non-IBM Rational Portfolio Manager Users

Prior to requesting access to Rational Portfolio Manager, non-IBM Rational Portfolio Manager users must register their Rational Portfolio Manager ID to be able to log into Rational Portfolio Manager. The IBM Registration process is simple and only takes a few minutes to complete. Here are the steps:

- If you are a New Rational Portfolio Manager user, choose an IBM ID and inform the Project Manager (PM) of the IBM ID you have selected (see the special rules below). Your PM is responsible for approving your access to Rational Portfolio Manager and will request your IBM ID to be added to Rational Portfolio Manager.
- If you are an existing Rational Portfolio Manager user, enter your exact Rational Portfolio Manager login ID (also called your Rational Portfolio Manager USERID) in the "IBM ID" field (see the special rules below).
- Enter a password.
- Create a security question and answer.
- Enter your email address (see the special rules below).
- Enter some information about yourself, as required on the form.
- Choose to 'opt out' of being contacted if so desired.

Special Rules for Registering UserIDs for Rational Portfolio Manager:

- There must be no "ibm.com" in the name chosen as your "IBM ID." The IBM ID must not contain "ibm.com." For example, ADMIN@xx.**ibm.com** is invalid and will not work. Valid Rational Portfolio Manager IBM IDs are: ADMIN@admin.com, or jane.smith@internet.com for example.
- There must be no "ibm.com" in ANY field in the IBM Registration, including the email address of the person registering.

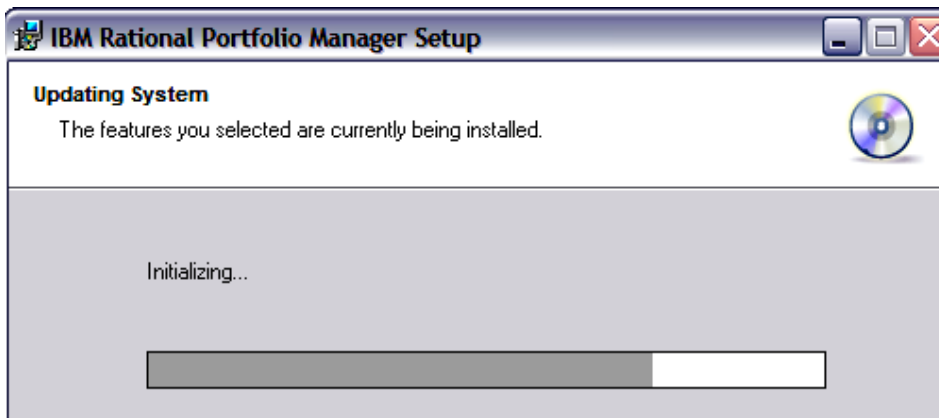
- The IBM ID and the 'email address' do NOT have to be a valid email address. However if you would like to be notified by IBM Registration about password problems (like when your PW is inactivated by multiple incorrect login attempts) you must use a valid email address to receive such notices.
- These three characters may be allowed by the IBM Registration process but are not allowed by Rational Portfolio Manager: () %

Do not use any of these Rational Portfolio Manager special characters in your IBM ID.

Follow these instructions to install Rational Portfolio Manager client

- Close ALL open applications
1. Download the Rational Portfolio Manager [client install executable](#) file from the Rational Portfolio Manager Install page.
 2. Confirm the size of the install file with the size information from the install page to ensure the file completely downloaded. (To do this: locate file > right mouse click > Properties)
 3. Launch (double-click) install file. The installation program starts.
 4. The following window will be displayed during the installation process (the progress bar will move from left to right):

Figure 1 - Rational Portfolio Manager Setup Process



5. Multiple messages will be displayed during the installation process, which may include the following: Copying new files, Creating shortcuts, Registering product, Removing backup files
6. Rational Portfolio Manager will be installed to the following directory:

C:\Program Files\IBM\Rational Portfolio Manager

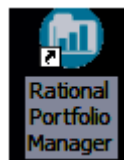
Note: The installation process may take up to **10 minutes** to complete.

The Rational Portfolio Manager icon is added to the desktop at the conclusion of the installation process.

B. Access Rational Portfolio Manager

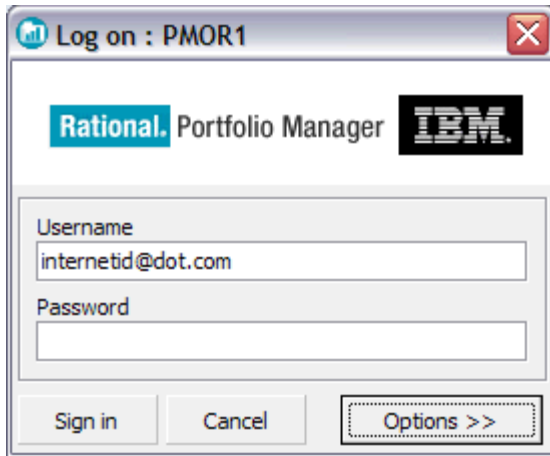
Step 1 Click the Rational Portfolio Manager icon on the Windows desktop

At the conclusion of the install process, the Rational Portfolio Manager Log on: window should appear. If it



does not, locate the Rational Portfolio Manager icon on your Windows desktop; double-click to bring up the Rational Portfolio Manager Logon window.

Figure 2 - Rational Portfolio Manager Login



Establish a Logon Configuration and sign on.

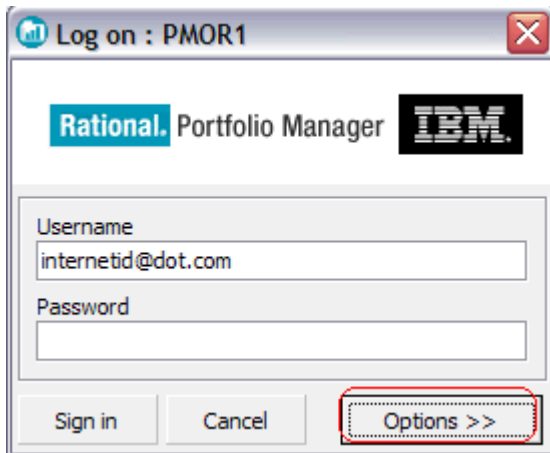
New users: establish your logon configuration to define the network settings for your connection to the appropriate Rational Portfolio Manager Repository. Check your Welcome Letter for the configuration information.

Existing users: you should verify the configuration definition with the information included in your Rational Portfolio Manager Migration notification letter. Configuration settings are maintained during the upgrade.

Step 1 Click the Options button

From the Rational Portfolio Manager Logon window, click the **Options >>** button.

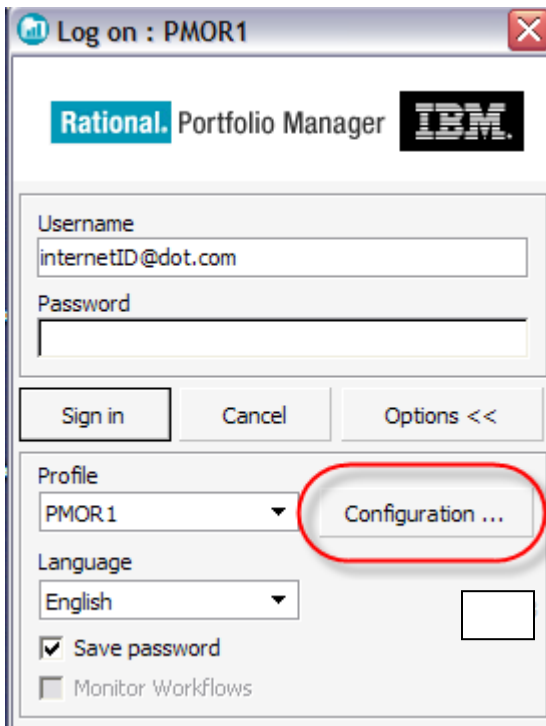
Figure 3 - Rational Portfolio Manager Logon Options



Step 2 Click the Configuration button

Clicking the Options button on the Logon window as shown in Figure 3 will expand the window, as shown below. Click the **Configuration...** button.

Figure 4 - Rational Portfolio Manager Configuration



Log on : PMOR1

Rational Portfolio Manager IBM

Username
internetID@dot.com

Password

Sign in Cancel Options <<

Profile
PMOR.1 Configuration ...

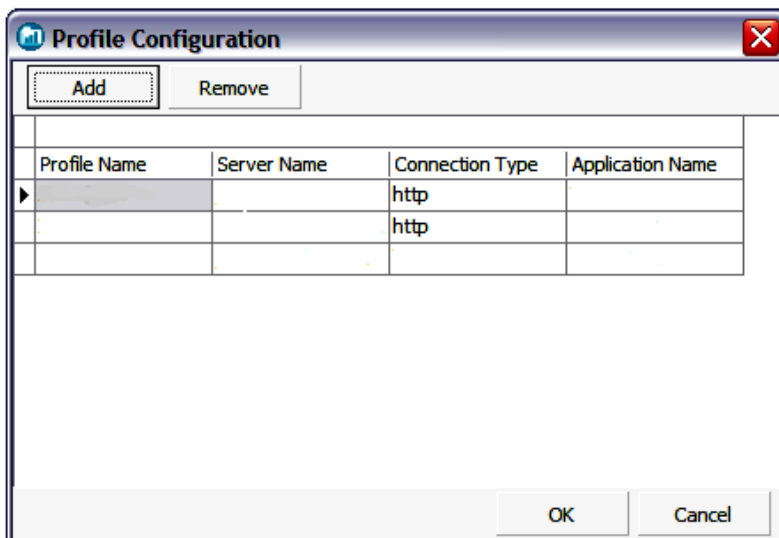
Language
English

Save password
 Monitor Workflows

Step 3 Create a new configuration by entering data in each field

Clicking the **Configuration...** button opens the Profile Configuration window, as in Figure 5.

Figure 5 - Rational Portfolio Manager Profile Configuration



Profile Configuration

Add Remove

Profile Name	Server Name	Connection Type	Application Name
		http	
		http	

OK Cancel

Existing users: Verify that your configuration settings have been maintained. If they have been maintained proceed to step 4.

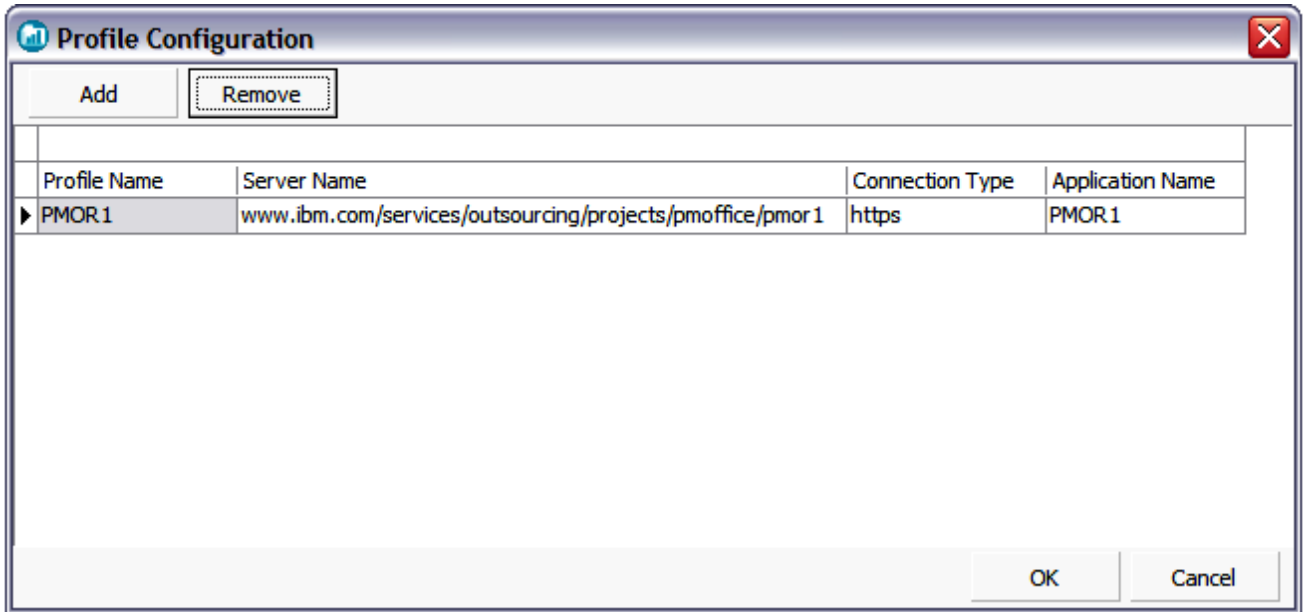
Enter data into each field by first clicking in the field and then entering the appropriate data. The chart below explains the data that should be entered into the fields on the Profile Configuration window.

Note: This information was included in your Welcome Letter.

Data Type	Description	Details
Profile Name	Any name that you choose to use to identify the Profile entry (ex: PMOR1)	Not case sensitive
Server Name	The TCP/IP host name or address for the Rational Portfolio Manager server	Must be exact
Connection Type	An entry describing the type of connection to be made to the server (default = 'https')	Must be exact
Application Name	Name of the PM Office Application (ex: PMOR1)	Case sensitive

Note: Take care when copying and pasting the server information from the welcome letter to this profile to not copy blank spaces.

Figure 6 - Rational Portfolio Manager Profile Configuration Sample

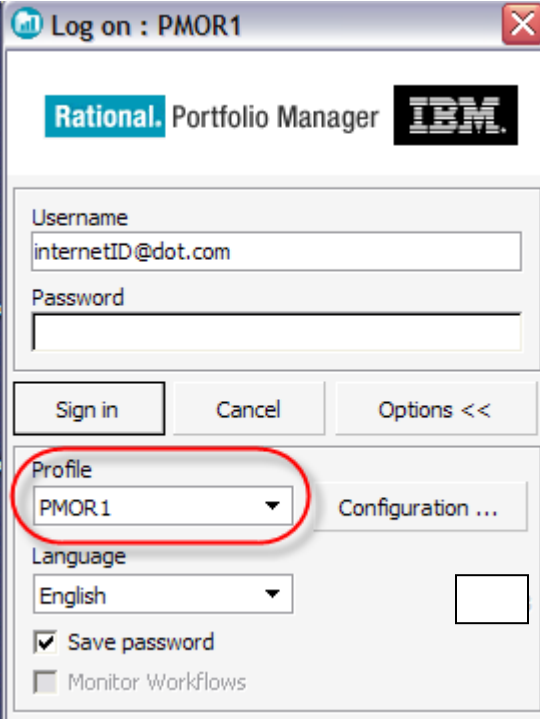


Step 4 Click OK

On the Profile Configuration window (shown above in Figure 6), click the **OK** button.

The Profile Configuration window closes and the new profile entry is now available in the Profile drop-down list on the Logon window, as shown in Figure 7.

Figure 7 - Rational Portfolio Manager Profile Selection



The screenshot shows the 'Log on : PMOR1' window. At the top, there are the 'Rational. Portfolio Manager' and 'IBM' logos. Below the logos are input fields for 'Username' (containing 'internetID@dot.com') and 'Password'. A row of buttons includes 'Sign in', 'Cancel', and 'Options <<'. Below this is a 'Profile' dropdown menu with 'PMOR1' selected, which is circled in red. To the right of the dropdown is a 'Configuration ...' button. Further down are 'Language' (set to 'English') and two checkboxes: 'Save password' (checked) and 'Monitor Workflows' (unchecked).

Step 5 Select language from drop-down list, enter username and password

If your organization's installation of Rational Portfolio Manager supports multiple languages, select a language. English is the default, as shown in Figure 8.

Type in your username and password – the fields are case sensitive.

New Internal Rational Portfolio Manager users: Your username is your intranet id (eg., absmith@us.ibm.com) and your password is your intranet password.

New External Rational Portfolio Manager users: Your username is the user ID you registered at IBM in section A of this document.

Figure 8 - Rational Portfolio Manager Sample Logon

Log on : PMOR1

Rational. Portfolio Manager IBM

Username
internetID@dot.com

Password

Sign in Cancel Options <<

Profile
PMOR.1 Configuration ...

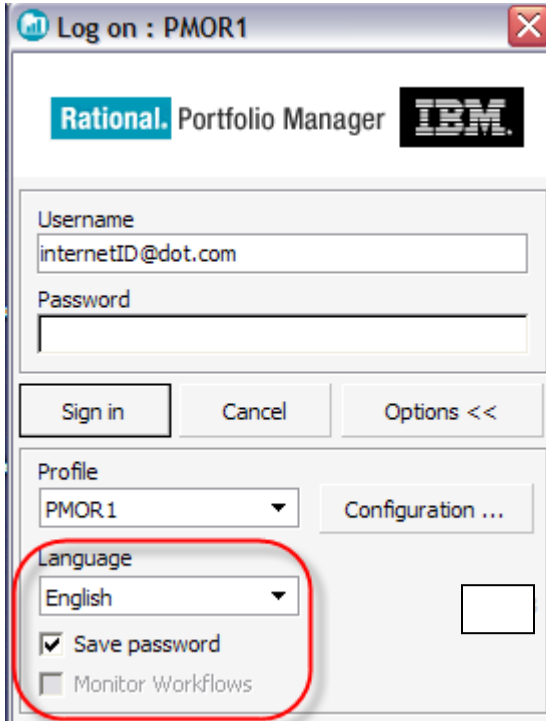
Language
English

Save password
 Monitor Workflows

Step 6 Select Save Password and Monitor Workflows

OPTIONAL Select **Save Password** and **Monitor Workflows**. If the workstation is not shared selecting these options allows monitoring of workflow processes and notifications. Do not select this option if the workstation is shared.

Figure 9 - Rational Portfolio Manager Logon Save Options



The screenshot shows the Rational Portfolio Manager Logon window titled "Log on : PMOR1". The window contains the following elements:

- IBM Rational Portfolio Manager logo at the top.
- Username field: internetID@dot.com
- Password field: (empty)
- Buttons: Sign in, Cancel, Options <<
- Profile dropdown: PMOR1, with a Configuration ... button.
- Language dropdown: English (highlighted with a red circle).
- Checkboxes: Save password and Monitor Workflows (both highlighted with a red circle).

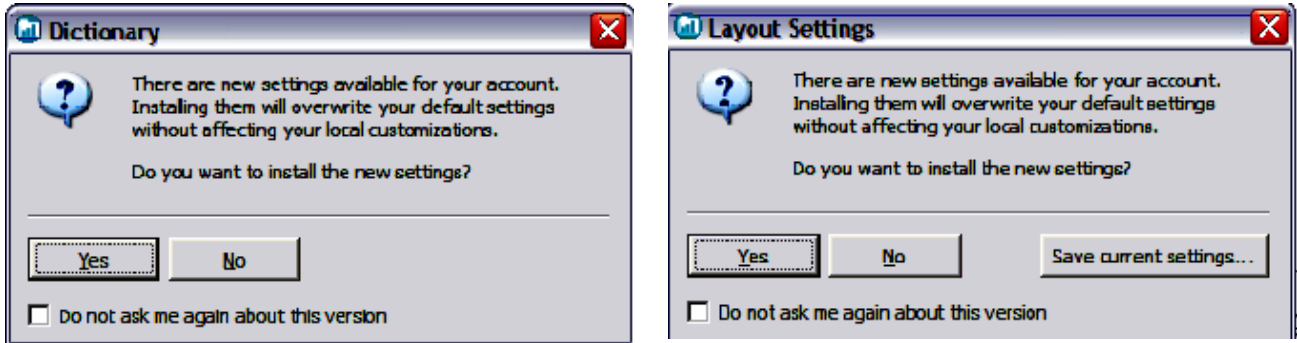
Step 7 Click Sign in

On the Logon window, click the **Sign in** button to connect to Rational Portfolio Manager.

Step 8 Accept Settings

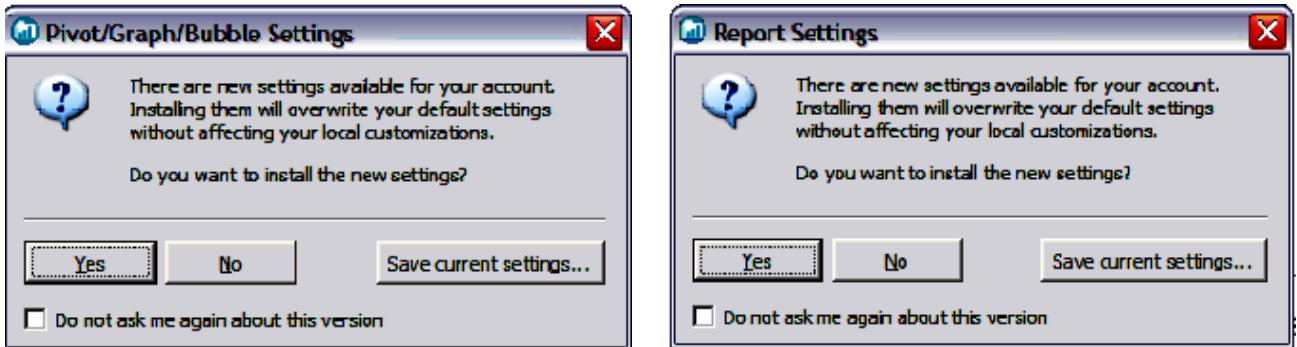
Note: Signing in for the first time you will see a progress bar and 4 dialog boxes. Accept the prompt for the 4 settings: (1) Dictionary, (2) Layouts and (3) Pivots and (4) Reports.

Figure 10 Dictionary and Layout Setting Prompts



Click Yes for new Dictionary and Layout settings.

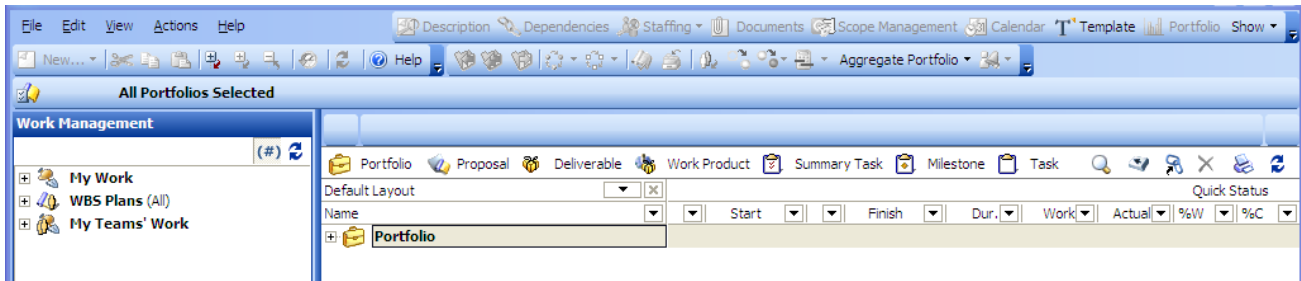
Figure 11 Pivot/Graph/Bubble and Report Setting Prompts



Click Yes for new Pivot/Graph/Bubble and Report settings.

Rational Portfolio Manager will open to the WBS View of the Rational Portfolio Manager desk top as shown below.

Figure 12 - Rational Portfolio Manager WBS View



C. How to Change Your Intranet/Internet Password

If you would like to change your Rational Portfolio Manager password, follow the steps to change or create/reset intranet/internet password:

External Users: <https://www.ibm.com/account/profile?page=chgexpw>

Internal Users: <http://w3.ibm.com/profile/update/password/en-us/index.html>

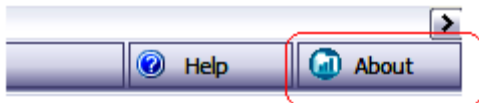
Your new password will take effect the next time you logon to Rational Portfolio Manager.

D. Version and Build Information

Whenever there is a new release , the Rational Portfolio Manager tool will automatically ask you to upgrade.

You can determine which version of Rational Portfolio Manager you are running by clicking the **About** icon in the lower right corner as shown in the screen below:

Figure 13 - About Rational Portfolio Manager - Version Indicator



Or on the Logon window when first starting a Rational Portfolio Manager session:

Example shown with 7.1.1.2

