

Rational Suite®

Administrator's Guide

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WINDOWS

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PATENT

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

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Preface

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

This manual replaces *Configuring Rational Suite* and *Using the Rational Administrator*.

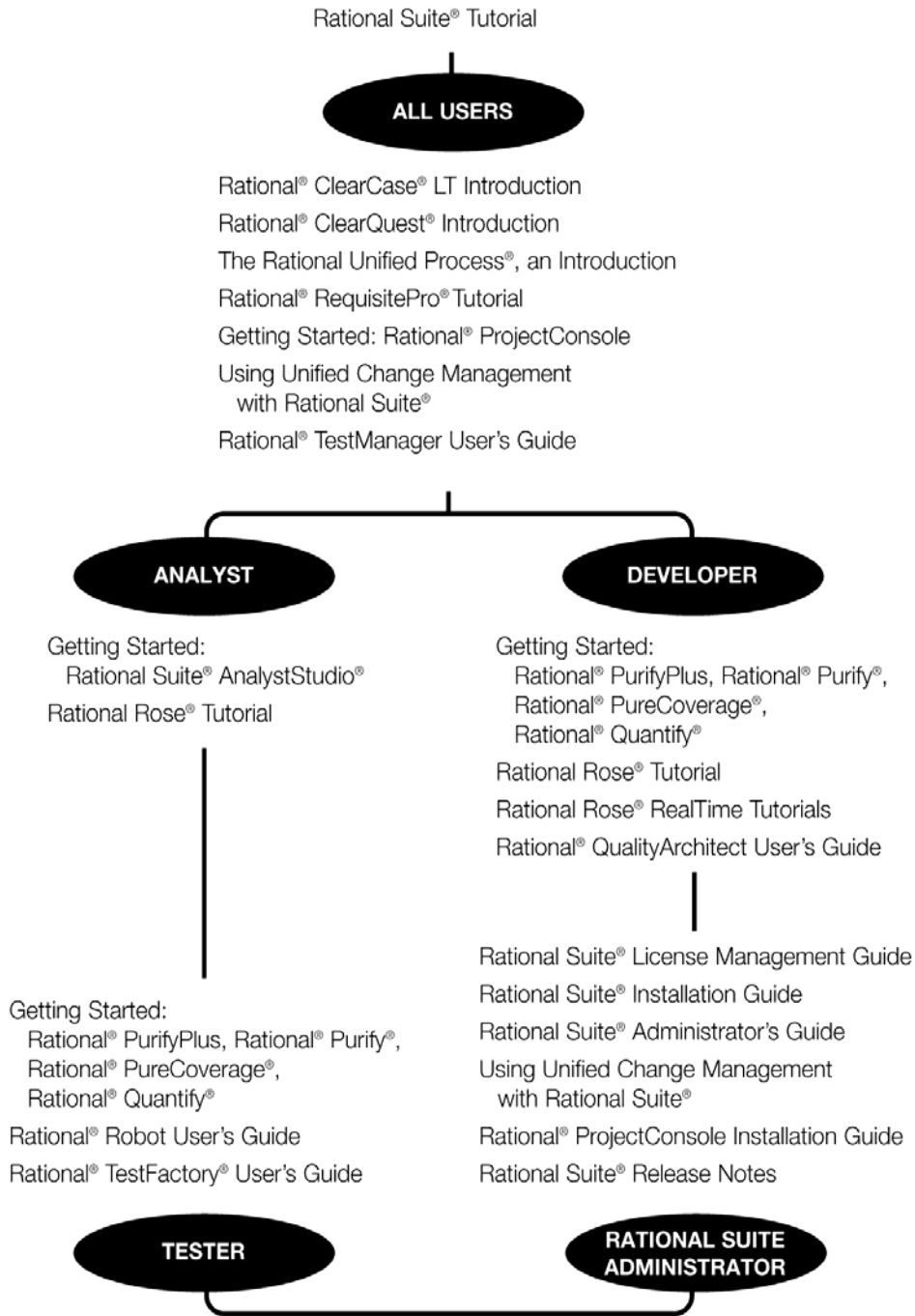
Audience

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 Technical Support

If you have questions about installing, using, or maintaining this product, contact Rational Technical 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 Technical 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 case ID number (if you are following up on a previously reported problem)

Setting Up a Rational Suite Environment

1

This chapter describes the tasks to perform to set up a Rational Suite environment when:

- You are installing Rational Suite for the first time on your network.
- You are upgrading from an earlier version of Rational Suite.

This chapter does not provide instructions for performing each task; rather, it gives an overview of the tasks and tells you where you can find more information.

Rational Suite Installation Guide for the First Time

When you install Rational Suite for the first time, you perform these tasks:

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

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 in your development environment, 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 <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. See <i>Rational ClearCase LT Administrator's Guide</i>.▪ ClearQuest. See <i>Rational ClearQuest Installation Guide</i>.▪ RequisitePro. See <i>Rational RequisitePro Installation Guide</i>.▪ Rational Test. See <i>Rational Robot</i>, <i>Rational TeamTest</i>, and <i>Rational TestManager Installation Guide</i>.
Database server	If you are using commercial databases with Rational Suite products, you probably want to install those databases on dedicated servers. See <i>Developing a Database Plan</i> on page 15.
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 <i>Rational ClearCase LT Installation Guide</i> .
ClearQuest administrator's system	To use ClearQuest, you need to designate one computer as the administrator's system. See <i>Rational ClearQuest 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
Microsoft Access	Fewer than 7 concurrent users	5 or fewer concurrent users per RequisitePro project	No more than one concurrent user
Sybase SQL Anywhere Server	5 to 20 concurrent users	N/A	One or more concurrent users
Microsoft SQL Server	More than 20 concurrent users	6 or more concurrent users per database	N/A
Oracle	More than 20 concurrent users	6 or more concurrent users per schema	N/A
IBM DB2	More than 20 concurrent users	N/A	N/A

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.

When using Oracle or SQL Server for storing RequisitePro projects, there may be multiple projects within one SQL Server database or one Oracle schema.

Concurrency is determined by the total number of current users accessing the database or schema, regardless of the number of RequisitePro projects.

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.

Rational Suite 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. However, you set most security parameters through individual point 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 User'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 39.
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.

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

Installing Rational ClearCase LT

To use ClearCase LT, you must have a ClearCase LT server installed and configured.

If you want to use your ClearCase LT server as a client computer as well, follow these guidelines:

- 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. *Rational Suite 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	Comment
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 45.
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	Comment
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 <i>Working with and Configuring Extended Help</i> on page 63.
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 Suite Installation Guide* contains more information, including information about prerequisites, how to install on a client computer, and activities to perform after you install.

Upgrading from an Earlier Release

When you upgrade from an earlier release of Rational software, you need to perform updates to related software, including databases and datastores for Rational products. You may also need to upgrade the commercial database you are using. General steps are as follows:

- 1 Back up existing data. Make sure that you keep a safe copy of your data so that you can revert to it if you run into problems during the upgrade.
- 2 If necessary, upgrade the databases used for your data. Depending on the database you have decided to use, there may be a newer version available.
- 3 Install the new version of Rational software and perform other upgrade tasks.

For more information, read “Upgrading from Earlier Versions of Rational Suite” in *Rational Suite Installation Guide*.

This chapter provides background 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. A Rational project consists of the following artifacts:

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

You use the Rational Administrator to create a Rational Project. With the Administrator, you can optionally place these artifacts under configuration management using Rational ClearCase.

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.

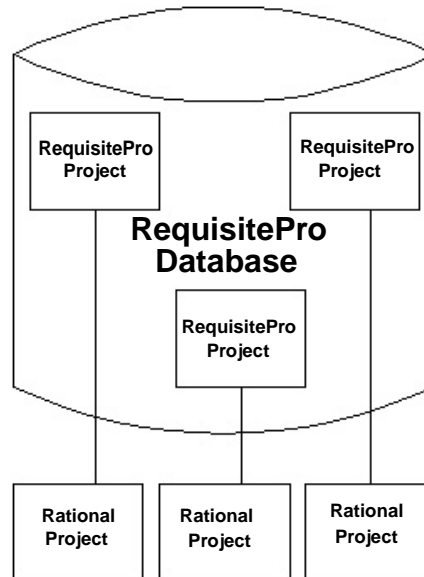
You itemize requirements within requirements documents, and then manage them using an integrated database. Each RequisitePro project consists of requirements documents and a dynamically-linked RequisitePro database. Your teams can collaborate, communicate, and provide updates on the same project. A RequisitePro 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 *Rational RequisitePro Installation Guide*. Read about using RequisitePro in *Rational RequisitePro User's Guide*.

Test Datastores

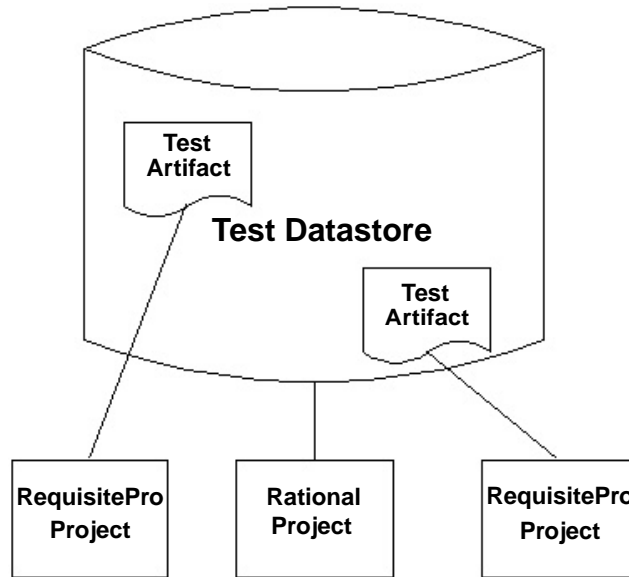
A Rational Test datastore is a collection of related test assets including test scripts, suites, datapools, logs, reports, test plans, and build information.

People generally 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:

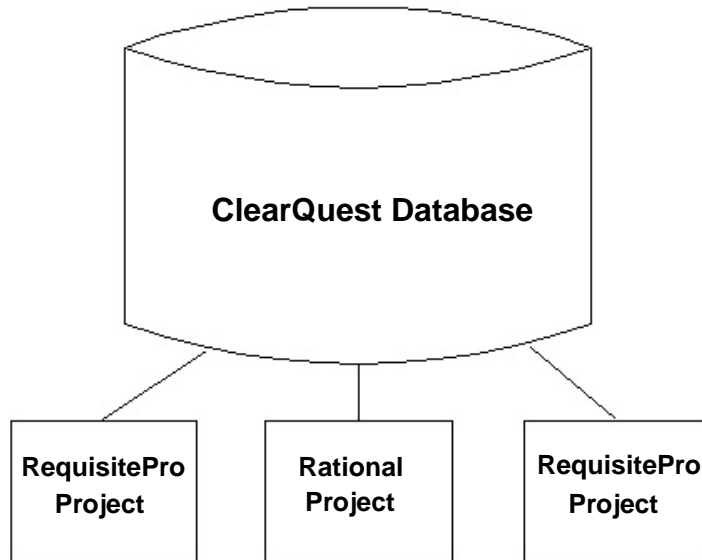
- The ClearQuest schema repository stores all schemas and all system data associated with existing schemas. The schema repository does not store any user data.

- 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



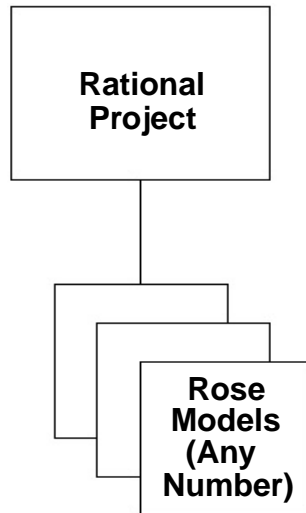
For a detailed overview of ClearQuest, see *Rational ClearQuest Introduction*.

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.

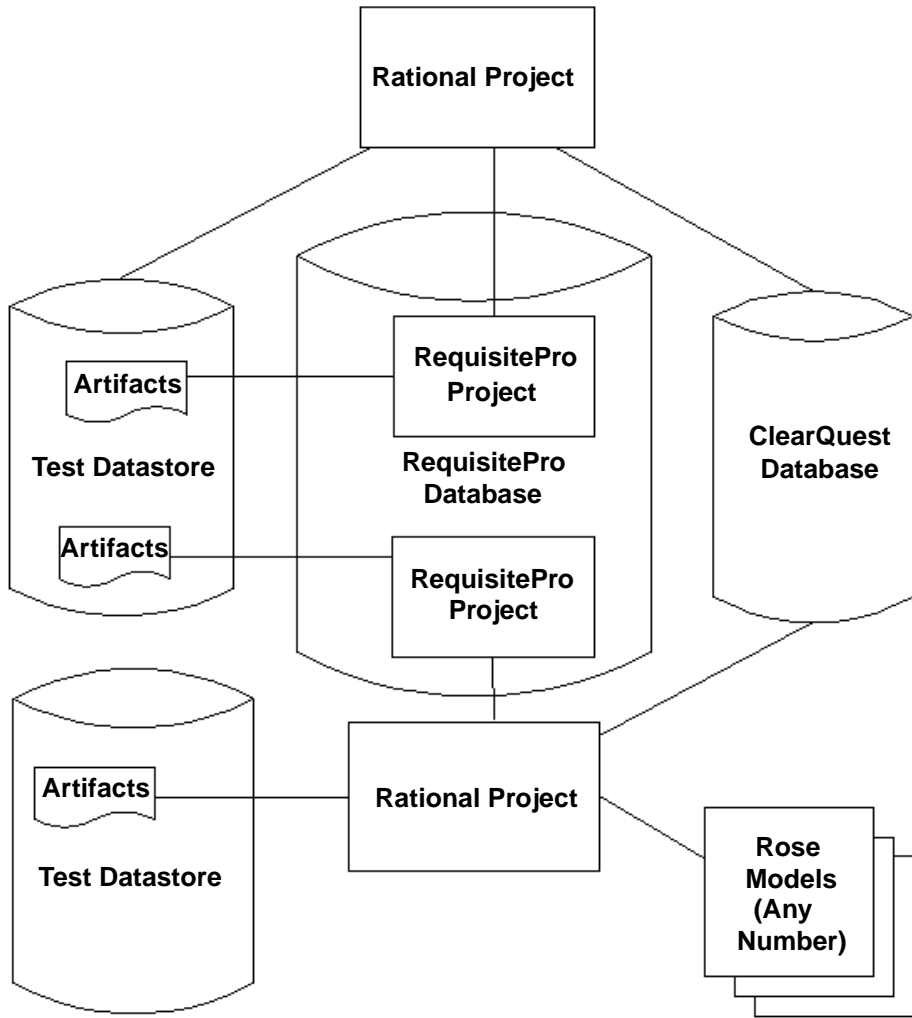
Figure 4 Relationship Between Rose Models and a Rational Project



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



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 only 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**.

Now, users and other programs can get access to these project views by using a UNC pathname, for example, *\\computer name\rational-project*.

Creating the Rational Project

To create a Rational project, perform the following steps:

- 1 Start the Rational Administrator: click **Start**, then click **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 path to the root of the project, referring to the share name you created in *Creating a Shared Directory* on page 27. For example, *\\computer-name\rational-projectrevenue*. 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.
- 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

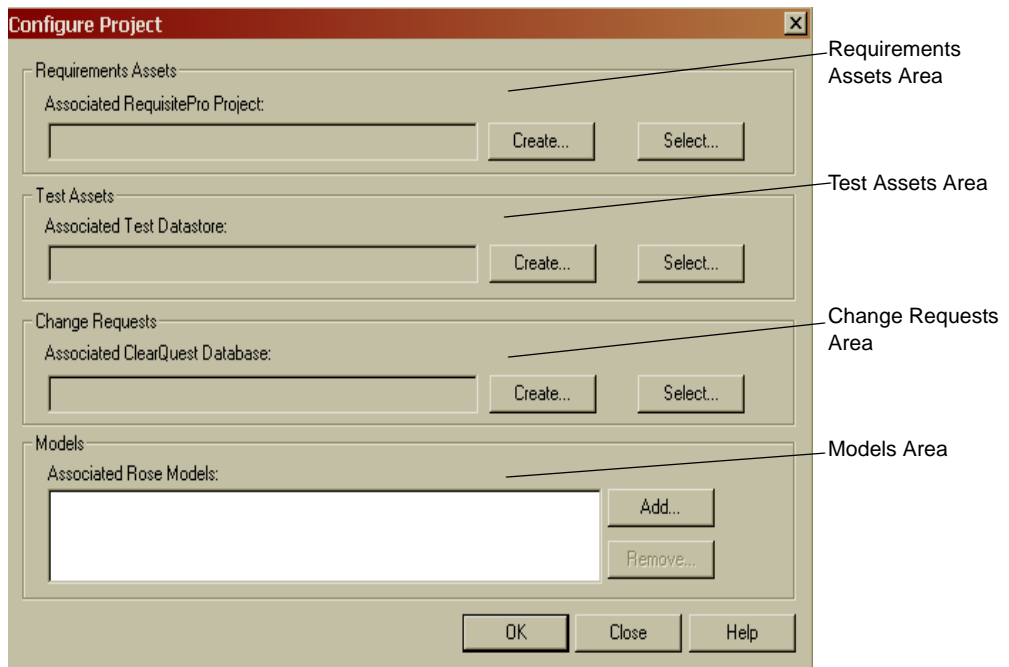
To configure a Rational project, you associate the project with the following artifacts:

- 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 already started, 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

Using ClearQuest MultiSite, you can share access to a ClearQuest database between multiple sites. However, one site must have ownership, or “mastership,” of the database.

If ClearQuest MultiSite is installed, you can only configure Rational projects if the site has mastership of the RA_Project record.

You must set up integrations individually for each database 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 RA_Project record and of the ClearQuest records you want to associate.

To ensure proper set up of ClearQuest MultiSite, ensure that the RA_Project record type mastership is not shared between sites.

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.

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 tool appears.
- 2 On the Create Test Datastore dialog box:
 - a In the **New Test Datastore Path** field, use a UNC pathname to specify an area where you'd like the tests to reside. For example, you might specify: \\computerA\project-directory\tests.
 - b Select initialization options as appropriate.
 - c Click **Advanced Database Setup** and select the type of database engine for the Test datastore.
 - d Click **OK**.

Associating an Existing Test Datastore with the Project

To associate an existing test datastore with your project:

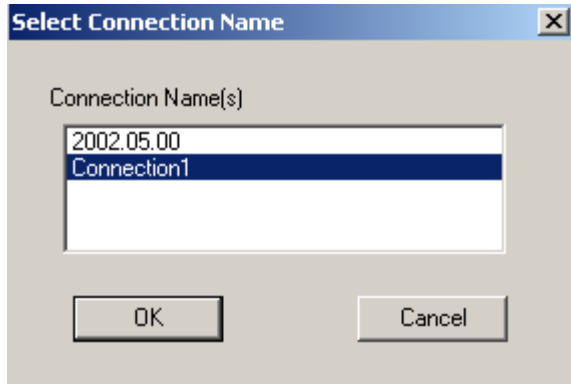
- 1 On the Configure Project dialog box, click **Select** in the Test Assets area. The Select Test Datastore dialog box appears.
- 2 Navigate to the Test datastore you wish to associate with the Rational project, or enter the UNC pathname where the Test datastore resides.

Associating a ClearQuest Database

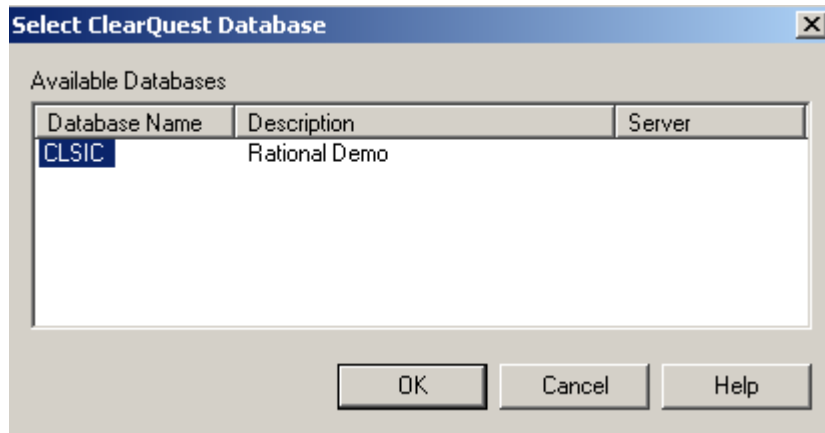
Rational ClearQuest is a change request management tool that helps you track and manage all the change activities (such as defects and enhancement requests) associated with a Rational project.

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, select the database connection associated with the ClearQuest database you want to work with. Click **OK**.



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



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.

Rational Rose XDE Considerations

Using Rational Rose XDE, you can migrate your Rose model (.mdl file) to a Rose XDE model (.mdx file).

However, keep in mind that the Rational Administrator currently offers no support for XDE models. After migration from Rose to Rose XDE, the Rational Administrator will continue to display the Rose model (.mdl) in the state in which it was migrated. The newly migrated Rose XDE model (.mdx) will not be displayed through the Rational Administrator.

Working with a Rational Project

4

This chapter describes additional administrative tasks you may want to perform while working with a Rational project.

Connecting to a Rational Project

You must connect to a Rational project before you can configure it, or 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 the project after creating and configuring 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 location of 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 there is no longer a need to administer a Rational project from a computer other than the one on which it was created, remove the project name and details from the Rational Administrator by unregistering the project. Unregistering a Rational project does not delete a Rational project. 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

While you are working with a Rational project, you can display and edit the project name and 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 For changes to take effect:
 - a Disconnect from the project.
 - b Connect to the project.

Disconnecting from a Rational Project

After you finish working with a Rational project, disconnect from the Rational project. Disconnecting from the project, followed by 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**.

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.

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

If ClearQuest MultiSite is installed, you can only delete Rational projects if the site has mastership of the RA_Project record.

You must set up integrations individually for each database 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 RA_Project record and of the ClearQuest records you want to associate.

To ensure proper set up of ClearQuest MultiSite, ensure that the RA_Project record type mastership is not shared between sites.

Working with SQL Anywhere Functions

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 5 for examples of types of Test assets.

Table 5 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 provides the steps for configuring the integration of Rational ClearQuest and Rational RequisitePro. This integration allows you to associate ClearQuest enhancement request and defect records with Feature requirements in RequisitePro. The majority of the administrative tasks involve configuration of ClearQuest, so we strongly recommend that the Rational tools administrator have ClearQuest administration experience.

To learn about using the integration between RequisitePro and ClearQuest, refer to the *Let's Go AnalystStudio* application provided with your software.

Overview of the Configuration Process

When configuring the integration, you perform the following steps:

- 1 Verify the configuration.
- 2 Configure a ClearQuest schema.
- 3 Configure a RequisitePro project.
- 4 Configure a Rational project.
- 5 Set up the integration mapping.
- 6 Optionally, customize your integration.

If you are enabling the integration for the first time, Rational provides components to help you get started. These preconfigured components are:

- Rational ClearQuest database schemas
- Rational RequisitePro project templates

How to Use this Chapter

If you are	Then
Installing Rational Software for the first time.	Follow the instructions in this chapter.
Upgrading from an earlier version of Rational Software and configuring this integration for the first time.	Ensure that you have followed the instructions in "Upgrading from Earlier Versions of Rational Suite" in the <i>Rational Suite Installation Guide</i> , then follow the instructions in this chapter.
Upgrading from an earlier version of Rational Software and you configured this integration in that earlier version.	Ensure that you have followed the instructions in "Upgrading from Earlier Versions of Rational Suite" in the <i>Rational Suite Installation Guide</i> . That chapter describes how to upgrade the existing configuration between RequisitePro and ClearQuest.

Verifying the Configuration Settings

This section describes the minimal configuration settings you need before you configure the integration between ClearQuest and RequisitePro. Most project templates and schemas supplied by Rational already use these minimal configuration settings as defaults and require no action on your part.

However, 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 integration. Similarly, 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 integration.

Deciding Whether to Customize the Configuration Settings

If your ClearQuest schema or RequisitePro project does not conform to the standard record and requirement types in this section, choose one of the following sets of steps.

- Create the appropriate record types, actions, states, and requirement types that match the default settings in the *ASCQISetup.bat* file, as described in this section. For additional information on these default settings, refer to *ASCQISetup.exe Command Argument Descriptions* on page 60.

- Revise the ASCQISetup.bat file to reflect your custom record types, actions, states, and requirement types. In this case, skip the following sections regarding the default integration settings and refer to *Customizing Your Integration* on page 58. Plan your custom integration thoroughly before proceeding to configure your schema. When your customizations are properly reflected in the ASCQISetup.bat file, proceed to configure your schema as described in *Configuring a ClearQuest Schema* on page 48.

ClearQuest Minimal Configuration Settings

To confirm that your schema conforms to the default integration settings:

- 1 Verify that your schema has the following record types:
 - A *Defect* record type with a **Submit** form and a **Record** form.
 - An *EnhancementRequest* record type with a **Submit** form and a **Record** form.
- 2 Verify that each record type has the following actions of the appropriate type:

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

- 3 Verify that the state transition charts are appropriately updated to reflect your actions.

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

RequisitePro Minimal Configuration Settings

The RequisitePro project must have at least one requirement type with at least one attribute. To conform with the default information in the ASCQISetup.bat file, configure the requirement type and attributes according to the following procedure:

- 1 Create one requirement type with prefix FEAT.
- 2 Give that requirement type two attributes of the ClearQuest Integration type: *Defect* and *EnhancementRequest*.

For more information on how to create requirement and attribute types, refer to *Working with Requirement Types* in RequisitePro Help. For more information on how to enable custom requirement and attribute types in the integration, refer to *Changing the Default RequisitePro Requirement Types* on page 58.

Configuring a ClearQuest Schema

No schema configuration is necessary if you used one of the following Rational Suite schemas supplied with this release of your software when creating your ClearQuest user database:

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

If you used one of these schemas to create your user database, proceed to *Configuring a RequisitePro Project* on page 52.

Applying ClearQuest Packages

If your schema is not based on one of the Rational Suite schemas, apply the RequisitePro and Repository packages to enable the integration between RequisitePro and ClearQuest. These packages add fields, forms, and scripts to the schema to support the integration.

Determining Which Packages Are Applied

Before applying the package, verify which packages have already been applied to your schema.

- 1 Launch the Rational ClearQuest Designer from the **Start** menu. Log on to your schema database with an administrator profile. The Open Schema window appears. Click **Cancel**.
- 2 Click **View > Schema Summary**. The Schema Summary dialog box appears.
- 3 Open the appropriate version of the schema in the folder.

- 4 In the **Associated Packages** list, note whether the RequisitePro and Repository packages are present:
 - If the Repository package is not present, apply the Repository package in the following procedure.
 - If the RequisitePro package is not present, apply the RequisitePro package in the following procedure.
 - If both packages are present, do not apply them again. Instead, proceed to *Upgrading the Repository and RequisitePro Packages* on page 50.
- 5 Click **OK** to close the Schema Summary dialog box.

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.

Upgrading the Repository and RequisitePro Packages

To confirm that all the packages in your schema are of the latest version, run the **Upgrade Installed Packages** tool. This tool automatically detects and upgrades all existing packages to the latest version. Take the following steps to upgrade existing packages to the most recent version.

- 1 Click **Package > Upgrade Installed Packages**.
- 2 Select the appropriate schema from the list and click **Next**. The tool displays the packages that need to be upgraded.
- 3 Click **Upgrade**, then **Exit**, to complete the process.

Adding Required Schema Entries

The integration between RequisitePro and ClearQuest requires a Back Reference field on your Requirements_List field for each of the record types you selected when you applied the RequisitePro package, such as *Defect* and *EnhancementRequest*. The name of this record type must match the Back Reference field name in the ASCQISetup.exe command line exactly. For more information on the ASCQISetup.exe command line, refer to *ASCQISetup.exe Command Argument Descriptions* on page 60.

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

- 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. This name must match the Back Reference field name in the ASCQISetup.exe command line exactly, as described in *Adding Your Customizations to the ASCQISetup.bat file* on page 59. 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.
Note: If you enter a custom name at this field, you must edit the Back Reference field name in the ASCQISetup.exe command to match it, as described in *Adding Your Customizations to the ASCQISetup.bat file* on page 59.
- 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**.

Applying the Changes to the ClearQuest User Database

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.

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

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 you create a query that filters records in your database by mastership. Use it to screen records prior to associating them with requirements in the **Associate [Attribute Type]** dialog box. For more information on this dialog box, refer to RequisitePro Help.

A RequisitePro project may be associated with no more than one database at a time. A ClearQuest database may be simultaneously associated with multiple RequisitePro Projectseach record with only one requirement at a time, the ClearQuest database containing that record with multiple RequisitePro projects.

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

Configuring a RequisitePro Project

This section describes the steps necessary to prepare your RequisitePro project for integration with a ClearQuest database. You do not need to take these steps if you created your project from one of the following project templates provided with the current release of RequisitePro:

- Composite Template
- Traditional Template
- Use-Case Template

If you used one of these templates to create your RequisitePro project, proceed to *Configuring a Rational Project*. If not, you must configure RequisitePro requirement types attributes to enable the integration. Refer to *Changing the Default RequisitePro Project Attributes* on page 58.

Configuring a Rational Project

If your ClearQuest database and RequisitePro project are already associated with a single Rational project, proceed to *Setting Up the Integration Mapping* on page 53.

If you are not upgrading a Rational repository or project, use the Rational Administrator to create a project. When configuring the Rational project, select the ClearQuest database and the RequisitePro project that you've configured for the integration. For more information, see *Creating and Configuring a Rational Project* on page 27.

Setting Up the Integration Mapping

To enable the integration of ClearQuest and RequisitePro, associate ClearQuest record types with RequisitePro requirement types. This association is created by editing and running a batch file. This section details the necessary steps.

Collecting Setup Information

To enable the integration in your specific environment, edit the ASCQISetup batch file to reflect your configuration settings. This file contains the command arguments shown in Table 6. Use this table to record the values of each variable for your project. You will use this information to edit the batch file.

Note: If your installation spans multiple computers, use Universal Naming Conventions (UNC) paths, as noted in Table 6.

Table 6 Variables Describing Your Environment

Batch Command	Description	Must Edit	Your Values
set CQDatabaseName = user database name	The internal name of the ClearQuest User database (for example, <i>SAMPL</i>), available from the ClearQuest Designer menu View > Database Summary .	You must edit this entry.	
set H = hard drive letter	The hard drive letter where RequisitePro is installed, followed by a colon (for example <i>C:</i>). This refers to the Administrator's installation, not the client installation.	The default value is <i>C</i> . Edit this entry only if you installed RequisitePro on a drive other than the <i>C</i> drive.	
set U = logon name	The logon name for the ClearQuest database, the RequisitePro project, and the Rational Project. This logon name has Super User privileges.	By default, the logon name <i>admin</i> has Super User privileges for ClearQuest. If you are using a logon name other than <i>admin</i> for RequisitePro, ClearQuest, or the Rational Project, edit this field.	
set P = path	The path to the administrator's local Rational installation directory.	You must edit this field.	

Table 6 Variables Describing Your Environment (continued)

Batch Command	Description	Must Edit	Your Values
set RP = "project name"	The name of the RequisitePro project as displayed in the RequisitePro Project > Open dialog box.	You must edit this field.	
set RQS = "full directory path"	The full directory path to the RequisitePro *.rqs file	You must edit this field. If your installation spans multiple computers, use a UNC path.	
set Help= "full directory path"	The full path to the ClearQuest/ RequisitePro Integration help file (Program Files\ Rational\ RequisitePro\ Help\CQI.hlp).	You must edit this field if the CQI.hlp file is in a location other than the default location listed in the ASCQISetup.bat file. If your installation spans multiple computers, use a UNC path.	

Editing the ASCQISetup.bat File

Now use the information in Table 6 to modify the ASCQISetup.bat file for your specific environment. The file is in the directory *Instal\Program Files\Rational\Common*. The ASCQISetup.bat file is designed to be run *only* by the administrator and all settings in this file should reflect those of the administrator's installation. After the file runs, it does not need to run again unless one of the above variables changes. Edit and run this file once for each RequisitePro and ClearQuest project that you want to integrate.

- 1 Use a text editor such as Notepad to open the file.
- 2 Save a copy of the ASCQISetup.bat file with a name that corresponds to your Rational project (you use the Rational Administrator to create a Rational project). For example, you might create a copy named *ASCQI_RA_project_name.bat*. Edit this copy to include the data specific to your ClearQuest database and RequisitePro project environment as follows:
- 3 At each `set` command, replace the variable, including the angle brackets, with the value containing the project-specific information you supplied in Table 6.

Example ASCQISetup.bat File

The following example of a modified ASCQISetup.bat file was edited to work with the integration for the *Rational Suite Tutorial* data, which is used throughout the document, *Getting Started: Rational Suite AnalystStudio*. This sample batch file reflects a local installation of RequisitePro and an unmodified help file. Remember to use UNC paths when necessary to reflect your installation environment.

Note: The **REM** command precedes a comment. Fields that you are required to edit are in **bold**. When editing to reflect your project specifications, replace the bold text with information about your administrator's project installation.

```
REM Before you launch this batch file, please update the following
information:
```

```
REM **** INFORMATION TO UPDATE ****
```

```
REM Update the name of the ClearQuest database.
```

```
set CQDatabaseName=CLASIC
```

```
REM Update the hard drive letter where your local Rational products are
installed.
```

```
set H=C:
```

```
REM Update the Super User login name for ClearQuest database and
RequisitePro project.
```

```
set U=admin
```

```
REM Update the path to your local Rational installation directory.
```

```
set P=\\Server_Name\Program Files\Rational\
```

```
REM Update the name of your RequisitePro project.
```

```
set RP=Order Processing and Fulfillment System
```

```
REM Update the full name to your RequisitePro .rqs file.
```

```
REM Use a UNC path for a project on a nonlocal computer.
```

```
set RQS=\\Server_Name\Program Files\Rational\Classics Demo\
ClassicsRepo\Project\ClassicsPOS\Requisite\requisite.rqs
```

```
REM Update the path to the cqi.hlp file.
```



```
REM Use a UNC path for a project on a nonlocal computer.
set Help=\\Server_Name\Program Files\Rational\RequisitePro
\help\cqi.hlp
```

```
REM **** BEGINNING OF THE SCRIPT ****
```

```
%H%
```

```
cd %P%\common
```

```
REM Create the association between the 'Defect' ClearQuest record type
and the RequisitePro attribute 'Defect' of the Feature requirement
type.
```

```
ASCQISetup.exe -c %U% %CQDatabaseName% Defect Requirements_List
Defects_list RProject Modify "Associate Defects" "%Help%" 1 "%RP%"
"%RQS%" FEAT Defect 2
```

```
pause
```

```
REM Create the association between the 'EnhancementRequest' ClearQuest
record type and the attribute 'EnhancementRequest' of the Feature
requirement type.
```

```
ASCQISetup.exe -c %U% %CQDatabaseName% EnhancementRequest
Requirements_List EnhancementRequests_list RProject Modify "Associate
Enhancement Requests" "%Help%" 1 "%RP%" "%RQS%" FEAT
EnhancementRequest 2
```

```
pause
```

Note: If the RequisitePro project does not have security enabled, the RequisitePro default project logon user name must be set to the Super User logon name specified in the ASCQISetup.bat file. This setting is available through the RequisitePro **Tools > Options** menu command.

Running the Batch File

Run the ASCQISetup batch file. As the batch file runs, it pauses every time it creates a setup record and prompts you to Press any key to continue. Press ENTER until the batch file ends.

Your integration has now been enabled and you are ready to associate ClearQuest enhancement request and defect records with Feature requirements in RequisitePro.

After the file runs, it does not need to run again unless one of the above variables changes. Edit and run this file once for each RequisitePro and ClearQuest project that you want to integrate.

Customizing Your Integration

The ClearQuest and RequisitePro integration is configured with the following default types:

- *Defect* and *EnhancementRequest* ClearQuest record types
- *Feature* RequisitePro requirement type

You can use your own types to fit your development process. To do so, modify the ClearQuest database schema and the RequisitePro project structure, and then edit the ASCQISetup.bat file to contain your new values in the command arguments. The following components can be customized:

- The RequisitePro requirement types
- The RequisitePro requirement attribute labels
- The ClearQuest record types

Changing the Default RequisitePro Requirement Types

The ASCQISetup.bat file contains a default requirement type of FEAT (Feature) to use in associating a requirement with a ClearQuest record. If your development team uses a different requirement type to track the product features, you can change this requirement type. For instructions on adding a new requirement type, see the RequisitePro Help.

Changing the Default RequisitePro Project Attributes

If you add a new requirement type for use by the integration, you need to ensure that the requirement type contains a ClearQuest Integration attribute. This attribute displays the ClearQuest record ID associated with the requirement in RequisitePro.

To add the ClearQuest Integration attribute to a RequisitePro requirement type:

- 1 Back up your RequisitePro project.
- 2 Start RequisitePro and open the related project.
- 3 Click **File > Project Administration > Properties**.

- 4 On the **Attributes** tab, from the Requirement Type list, click the requirement type you have selected to use for the integration. Click **Add**. The **Add Attribute** dialog box appears.
- 5 In the Label field, enter a name for your new attribute.
- 6 From the Type list, select **ClearQuest integration**. Click **OK**.
- 7 Repeat steps 3–6 to add an attribute for each ClearQuest record type that you want to associate in the integration.
- 8 Save and close the RequisitePro project.

Changing the Default ClearQuest Records

The ASCQISetup.bat file contains the following default ClearQuest records that the integration uses when the batch file is run:

- EnhancementRequest
- Defect

These records can be changed to suit your development environment. Begin by changing the record type names in ClearQuest, or by adding your own new record types. For more information on adding or changing ClearQuest records, refer to the manual, *Rational ClearQuest Administrator's Guide*, on your documentation CD.

Adding Your Customizations to the ASCQISetup.bat file

After customizing your RequisitePro requirement types and attributes and your ClearQuest records, edit the entire ASCQISetup.exe command in the ASCQISetup.bat batch file as follows:

- 1 Replace **FEAT** with your requirement type, and **Defect** or **EnhancementRequest** with your customized attribute label or record.
- 2 Copy and update this command for each requirement type and attribute name to include in the integration.
- 3 Verify that the Back Reference field value, which is the fifth argument in the ASCQISetup.exe command, matches the value you used for the corresponding record type in your ClearQuest schema. For example, the ASCQISetup.bat file might contain lines similar to the following:

```
ASCQISetup.exe -c %U% %CQDatabaseName% Defect
Requirements_List Defects_list RASProject Modify "Associate
Defects" "%Help%" 1 "%RP%" "%RQS%" FEAT Defect 2
```

In this case, Defects_list is the value of the Back Reference field associated with the Requirements_List field of a Defect record. To change the back reference to your custom value, simply rename it to match the value of the record type your ClearQuest schema.

- 4 Run the ASCQISetup.bat file to activate the new values.

For more information about command line arguments for ASCQISetup.exe, see *ASCQISetup.exe Command Argument Descriptions* on page 60.

ASCQISetup.exe Command Argument Descriptions

At the end of the ASCQISetup.bat file, there are two calls to the routine ASCQISetup.exe. The following tables list the arguments of ASCQISetup.exe in the order in which they appear in the command. Table 7 describes the Rational ClearQuest arguments; Table 8 describes Rational RequisitePro arguments. If you do not plan to customize the integration, you do not need to refer to this section.

Table 7 Rational ClearQuest Related ASCQISetup.exe Arguments

Command Line Argument	Description	Comments
%U%	Name of Super User in ClearQuest, a user in RequisitePro, and a user in the Rational project to which your ClearQuest database and RequisitePro project belong.	This variable is defined in the ASCQISetup.bat file. If the Super User has different accounts in each tool, you will be prompted to log into each tool as necessary.
%CQDatabaseName%	Name of the ClearQuest database in which you want to create associations to requirements.	This variable is defined in the ASCQISetup.bat file.
Defect	Name of the ClearQuest record type whose records you want to associate with requirements.	
Requirements_List	Name of the ClearQuest record type field that stores references to associated requirements. This field must be of type Reference_List and reference the Requirement record type.	
Defects_List	Name of the Back Reference field defined for the previous field. This field automatically stores references of ClearQuest records associated with a requirement.	

Table 8 Rational RequisitePro Related ASCQISetup.exe Arguments

Command Line Argument	Description	Comments
RAProject	Name of the ClearQuest record type field that stores the Rational project containing the requirements you want to associate with the current ClearQuest record. This field must be of type Reference and refer to the Requirement record type.	
Modify	Name of an action of type MODIFY that operates on the ClearQuest_Record_Type_Name.	
Associate Defects	Title of the association dialog window that appears when the integration is called from RequisitePro. This title can mention, for example, the record type name of the ClearQuest records that will be associated.	
%Help%	Full path to the Help file used by both association dialog windows (either when the integration is called from RequisitePro or ClearQuest) in which you want to create associations.	This variable is defined in the ASCQISetup.bat file.
2	Context ID in the help file. This file is called from the Help button of the association dialog window, which appears when the integration is called from RequisitePro.	
%RP%	Name of the RequisitePro project in which you want to create associations to ClearQuest records.	This variable is defined in the ASCQISetup.bat file.
%RQS%	Full path to the RequisitePro project file in which you want to create associations.	This variable is defined in the ASCQISetup.bat file.
FEAT	Prefix of the requirement type you want to associate with ClearQuest_Record_Type_Name.	
Defect	Name of the attribute type in which the list of associated ClearQuest record IDs is stored.	
3	Context ID in the help file. This file is called from the Help button of the association dialog window, which appears when the integration is called from RequisitePro.	

Working with and Configuring Extended Help

7

Extended Help gives you access to the Rational Unified Process and other information databases (including ones that you create). You typically start Extended Help from a Rational Suite tool, so you can get information about process and policy without interrupting your work flow. You can customize Extended Help to include topics related to your own process or environment.

The remainder of this chapter tells you how to use Extended Help and how to customize it and perform other administrative tasks.

Using Extended Help

This section describes how to get the most out of using Extended Help. It describes how to start Extended Help, how to change context, and how to add or remove databases.

Starting Extended Help

To use Extended Help:

- 1 Go to a Rational tool and select **Help > Extended Help** from the tool's menu.
The Extended Help browser appears, listing topics in a tree browser on the left.
- 2 To view a topic, navigate to, and double-click on, a topic title in the tree browser.

Changing Context

In Extended Help, the context determines how many, and which, topics Extended Help can display. You can check your current context by looking at the right side of the status bar. For example:

- The context (Any, Any) means that Extended Help is displaying all topics for the databases that are currently active.
- The context (Rose, Any) filters the topics to just those that are relevant to Rose.
- The context (Rose, Use Case Diagram) filters topics further so that they are relevant to Use Case Diagrams within Rose.

When you start Extended Help, a context is established by determining what tool and sub-area you started from.

After you start Extended Help, you can reset the context to view more, fewer, or different topics. For example, say that Extended Help starts with the context (Rose, Use Case Diagram). You might want to change the context to (Rose, Activity Diagram), (ReqPro, Any), or even (Any, Any). To do so:

- 1 From the Extended Help menu, select **Edit > Context**.
- 2 Make selections from the **Product** list and the **Subtool** list. Notice that the value of **Product** affects the options listed under **Subtool**.
- 3 Click **OK**.

Adding or Removing Databases

A database contains the topics that you view in Extended Help. You can make more than one database available at any time. Changing the databases available changes the list of topics available to you. There are two ways to add or remove databases from Extended Help:

- Make a database active or inactive
- Add or delete Extended Help databases

Making a Database Active or Inactive

The effect of making a database active in Extended Help is to load all its topics into the Extended Help browser. Similarly, making a database inactive unloads its topics.

To make a database active or inactive:

- 1 From the Extended Help menu, select **Edit > Options**.
- 2 In the list of databases, locate the one you want to change.
- 3 Clear or select the check box in the **Active** column.

The change takes effect the next time you start Extended Help.

Adding or Deleting an Extended Help Database

When you add a database to Extended Help, you make its topics potentially available for viewing. (The database must also be active for you to see its topics.) Similarly, when you delete a database, you make its topics unavailable for viewing, but you don't physically delete the database from the disk. You can always re-add a deleted database back into Extended Help.

To add a database:

- 1 If you used this database in an earlier version of Rational Suite, or if you have not yet prepared the database for use with Extended Help, perform the steps listed in *Upgrading or Converting an Extended Help Database* on page 66.
- 2 From the Extended Help menu, select **Edit > Options**.
- 3 Click the **Add** button, then fill in the tables cells, pressing **Enter** or **Tab** after entering a value in each column:
 - a Determine whether the database should be active, and if so, set the **Active** check box.
 - b In the **Name** column, enter a human-readable and unique name that will help you remember the purpose of the database.
 - c In the **Path** column, accurately enter the path to the database.
- 4 Click **OK**.

To delete a database:

- 1 From the Extended Help menu, select **Edit > Options**.
- 2 Select the row containing the database you want to delete.
- 3 Click the **Delete** button.
- 4 Click **OK**.

The change will take effect the next time you start Extended Help.

Administering Extended Help

This section describes administrative tasks to perform with Extended Help:

- How to upgrade or convert a database used with an earlier version of Rational Suite.
- How to create an Extended Help database (this allows you to customize the information displayed by Extended Help).
- How to use translation strings to make database information more portable across multiple systems.

Upgrading or Converting an Extended Help Database

Before you add a database to Extended Help, ensure that it is in the correct format. You need to perform the tasks described in this section if:

- You are creating a new database (described on page 67).
- You are upgrading from an earlier version of Rational Suite.

To prepare a database for use with Extended Help:

- 1 Start with a correctly structured file in comma-separated variable format (CSV):
 - See *Creating an Extended Help Database* on page 67 to learn how to structure this file.
 - If you are starting with a Microsoft Access database, read about *Converting from a Microsoft Access Database to a .csv File* on page 66.
- 2 Start the EHelpUpdate program. In Windows Explorer, go to *install directory\common*, where by default, install directory is `c:\Program Files\Rational`.
- 3 Double-click EHelpUpdate.bat. The EHelpUpdate window appears.
- 4 In the **Input** file field, type or browse to the CSV file you've prepared.
- 5 In the **Output** file field, type or browse to a file whose type is .ehd, for example, `c:\temp\myExtendedHelp.ehd`
- 6 Click **OK**.
- 7 Continue with the steps in *Adding or Removing Databases* on page 64.

Converting from a Microsoft Access Database to a .csv File

If you used an earlier version of Rational Suite, you may have an existing Extended Help database. This database is most likely written in Microsoft Access. For this version of Rational Suite, you need to convert the Access database to a .csv file (a file in comma-separated values format) before you can use it.

To convert an Extended Help database from Access to a .csv file:

- 1 Go to a view of the database fields by opening the Access database and then opening the Help Table.
- 2 From the Access menu, select **File > Export**.

- 3 In the Export Table dialog box:
 - a Save the table to a filename with a .csv extension.
 - b Clear the **Save Formatted** check box.
 - c Click **Save All**.
- 4 The Export Text Wizard appears. On the first page of the wizard, select the **Delimited** export format.
- 5 On the next page, select the **Comma** delimiter to separate fields. Under **Text Qualifier**, select **{none}** or the quotation mark ("). Click **Finish**.
- 6 Use Microsoft Excel to open the resulting .csv file.
- 7 Select the third and fourth columns – Columns **C** and **D**. These columns should be empty. Delete them by selecting **Edit > Delete** from the Access menu.
- 8 Save the file again, keeping the same .csv extension.
- 9 Continue with the instructions in *Upgrading or Converting an Extended Help Database* on page 66.

Creating an Extended Help Database

If you create an Extended Help database, users at your site will have easy, desktop access to information important to your project, for example, policies and procedures. In fact, you can create an Extended Help database containing any information accessible by a URL. In some cases, individual users create Extended Help databases to provide a quick reference to important information.

High-Level Process

The high-level view of the creation process is:

- 1 Populate the database: use Microsoft Excel to create and enter pointers to the data (described in this section).
- 2 Add the database to Extended Help or tell your users to add it (described on page 64).
- 3 Tell your users how to use translation strings (described on page 70).

Populating the Database

To populate an Extended Help database:

- 1 Start Microsoft Excel.
- 2 For each database record, enter the following information in the first six columns:

Column	Field Name	Description
A	product	The name of the Rational product from which a query is invoked. See list of valid values on page 69.
B	subtool	The specific context within a product. See list of valid values on page 69.
C	query	This value becomes a folder name in the Extended Help browser. Think of it as a category for the information pointed to by this record, for example, "Requirements Traceability." You can use any value, up to 100 characters, but we recommend that you keep the length relatively short.
D	target	A URL pointing to the information for this record. The URL can be: <ul style="list-style-type: none">▪ A URL using an absolute value (example: http://www.rational.com)▪ A URL using a translation string – described on page 70 (example: corpinfo\requirements\traceability.html)▪ A file name (example: file:d:\myfile.html) The maximum length of this field is 255 characters.
E	short_description	The description that appears for the record under the folder in the Extended Help browser. The maximum length of this field is 50 characters.
F	description	A longer description that appears when the cursor is held over the item (the information appears in a tool tip). The maximum length of this field is 255 characters.

- 3 Save the file in the comma-separated values (.csv) format (use **File > Save as**).
- 4 Continue by adding the database to Extended Help (described on page 64).

Valid Product and Subtool Values

Table 9 describes valid combinations for values of Product and Subtool. A database record must have one of these valid combinations for Extended Help to find the record.

Note: You can use the value **Any** for the subtool or for the product and subtool. A value of **Any** indicates that any context matches. For example, the values (**ReqPro, Any**) match (**ReqPro, Toolbar**) or (**ReqPro, View**).

Table 9 Valid Products and Subtool Values

Product	Subtool
ClearQuest	Client
ClearQuest	Designer
RationalTest	Administrator
RationalTest	LoadTest
RationalTest	LogViewer
RationalTest	Robot
RationalTest	TestFactory
RationalTest	TestManager
ReqPro	Toolbar
ReqPro	View
Rose	Activity Diagram
Rose	Class Diagram
Rose	Collaboration Diagram
Rose	Deployment Diagram
Rose	Other Tool
Rose	Package Diagram
Rose	Sequence Diagram
Rose	Statechart Diagram
Rose	Use Case Diagram
SoDA	tool

You can also use these products with the subtool, **Any** (for example, (*product*, **Any**)):

- Purify
- VisualPurify
- VisualQuantify

Working with Translation Strings

A translation string is a variable that stands for part of a URL. It makes your Extended Help database portable to multiple systems.

Say that in a geographically distributed project, there exist local copies of the HTML pages pointed to by the Extended Help database. If you use absolute URLs, each set of HTML pages must be saved in exactly the same location. By using translation strings, however, you can store the HTML pages in a location appropriate to each site.

For example, you might have a set of HTML pages that are all under a single directory, say `\myProject`. You could define a translation string, `<project>`. On various systems, `<project>` might point to:

- `c:\program files\myProject`
- `d:\temp\HTML pages\projects\myProject`
- `h:\myVOB\projects\myProject`

Then, when you create records in an Extended Help database, you can use a translation string to refer to a URL, for example: `<project>\index\index.htm`

Defining Translation Strings on User Systems

On a user's system, define a translation string as follows:

- 1 From the Extended Help menu, choose **Edit > Options**.
- 2 Click the **Translation Strings** tab.
- 3 Click **Add**. A new blank line appears.
- 4 Under **String**, type the name of the translation string, for example, `<rup>`.
- 5 Under **Replacement**, type the path that the string should translate to, for example, `file:c:\Program Files\Rational\RationalUnifiedProcess`. Make sure that you do not include a final slash.
- 6 Click **OK**.

Deleting a Translation String

To delete a translation string:

- 1 From the Extended Help menu, choose **Edit > Options**.
- 2 Click the **Translation Strings** tab.
- 3 Select a translation string to delete.
- 4 Click **Delete**, then click **OK**.

This chapter provides pointers to information about troubleshooting, available throughout the Rational documentation set.

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.

For more information about enabling integrations with ClearQuest, see “ClearQuest Schemas and Packages” in *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 with integrations.

Rational Suite and ClearCase LT Considerations

To use ClearCase LT, you must have a ClearCase LT server installed in your environment.

If you want to use your ClearCase LT server as a client computer as well, follow these guidelines:

- 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.

For More Troubleshooting Information

Table 10 provides information on troubleshooting other Rational products.

Table 10 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 Suite Installation Guide</i>
ClearCase LT Administration	"Troubleshooting" chapter of <i>Rational ClearCase LT Administrator's Guide</i>
RequisitePro installation	"Troubleshooting" chapter of <i>Rational RequisitePro Installation Guide</i>
RequisitePro use	"Troubleshooting" chapter of <i>Rational RequisitePro User's Guide</i>

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