Using Rational DOORS for ClearQuest Interface

IBM Rational DOORS for ClearQuest Interface

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Release 2.2.1

Before using this information, be sure to read the general information under the "Notices" chapter on page 21.

Table of contents

Chapter 6: Notices   **21**

1 *About this manual*

Welcome to IBM® Rational® DOORS® for ClearQuest Interface.

This manual describes how to use version 2.2.1 of Rational DOORS for ClearQuest Interface. It assumes that you know how to use both Rational DOORS and ClearQuest®.

Typographical conventions

The following typographical conventions are used in this manual:

Typeface or Symbol	Meaning
Bold	Important items, and items that you can select, including buttons and menus. For example: Click **Yes** to continue.
Italics	Book titles
Courier	Commands, files, and directories; computer output. For example: Edit your .properties file.
>	A menu choice. For example: Select **File > Open**. This means select the File menu, then select the Open command from it.

Related documentation

The following table describes where to find information in the documentation set:

For information on	See
How to use Rational DOORS	The Rational DOORS documentation set
How to use ClearQuest	The ClearQuest documentation set
How to install Rational DOORS for ClearQuest Interface	*Rational DOORS Installation Guide*

These documents are on the Rational Information Center at
http://publib.boulder.ibm.com/infocenter/rsdp/v1r0m0/index.jsp.

2 *Concepts*

This chapter introduces Rational DOORS for ClearQuest Interface and explains the concepts you need to understand before you use it:

- About Rational DOORS for ClearQuest Interface
- About Rational DOORS for ClearQuest Interface functions
- Configuring Rational DOORS for ClearQuest Interface

About Rational DOORS for ClearQuest Interface

Rational DOORS is the world's leading tool for creating, structuring, and managing complex sets of requirements, such as those for a typical software development project. ClearQuest is a defect and change tracking tool.

Rational DOORS for ClearQuest Interface is a bridge between these two products, enabling users to co-ordinate defect tracking and requirements management. This integration is not supported on a ClearQuest MultiSite configuration.

About Rational DOORS for ClearQuest Interface functions

Rational DOORS for ClearQuest Interface allows you to:

- Query a ClearQuest database from a Rational DOORS project
- Edit ClearQuest records
- Link ClearQuest records to Rational DOORS objects, and track these links
- Attach files to a ClearQuest record using Rational DOORS for ClearQuest Interface

Configuring Rational DOORS for ClearQuest Interface

You can configure Rational DOORS for ClearQuest Interface so that a different ClearQuest database is used for each Rational DOORS project. This means that different ClearQuest databases and different form settings can be used on different Rational DOORS projects.

You can configure:

- **Database**

ClearQuest supports multiple databases. A ClearQuest database must be associated with each Rational DOORS Project that uses Rational DOORS for ClearQuest Interface.

- **Type Selection**

  ClearQuest supports many different types and schemas. You can select the ClearQuest types that you want to make available to Rational DOORS for ClearQuest Interface for each Rational DOORS project. You make a ClearQuest type available by associating it with a Rational DOORS for ClearQuest Interface type. There are two Rational DOORS for ClearQuest Interface types: **Enhancement Request (ER)** and **Defect**, which can be associated with any available ClearQuest types.

- **Query**

  You can configure Rational DOORS for ClearQuest Interface to display selected ClearQuest fields on the Query tab of the integration form. You can query the ClearQuest database on a single ClearQuest field, or on multiple ClearQuest fields. Rational DOORS for ClearQuest Interface supports the use of **And** or **Or** logic when querying on multiple fields.

- **Report Details**

  The results of a query are displayed on the Reports/Details tab of the integration form. You can configure Rational DOORS for ClearQuest Interface to display selected ClearQuest fields on the Report/Details tab of the integration form. ClearQuest records are displayed in a list in the top section of the tab. When a record is selected in the list, the details of that record are displayed in the lower section of the tab. You can control which of the fields in the bottom section of the tab you want users to be able to edit. ClearQuest system fields, for example **id** or **Submitter** cannot be edited.

- **Edit Records**

  You can configure Rational DOORS for ClearQuest Interface to display selected ClearQuest fields on the **Edit Record** tab of the integration form. You can control which of these fields you want users to be able to edit. ClearQuest system fields, for example **id** or **Submitter** cannot be edited.

3 *Configuring Rational DOORS for ClearQuest Interface*

This chapter describes:

- Configuring projects
- Configuring forms

Configuring projects

When you configure a Rational DOORS project to use Rational DOORS for ClearQuest Interface, you select the ClearQuest database you want to associate with the Rational DOORS project. You can then select the ClearQuest types that you want to make available to Rational DOORS for ClearQuest Interface for that project.

You make a ClearQuest type available by associating it with a Rational DOORS for ClearQuest Interface type. There are two Rational DOORS for ClearQuest Interface types: **Enhancement Request (ER)** and **Defect**, which can be associated with any available ClearQuest types. The ClearQuest types will be referred to in Rational DOORS for ClearQuest Interface by their Rational DOORS for ClearQuest Interface labels, i.e. Enhancement Request and Defect.

To configure a project you must be one of the following Rational DOORS users:

- **Administrator** user
- **Database Manager**
- **Project Manager**

Once you have configured Rational DOORS for ClearQuest Interface, any Rational DOORS users with access to the associated ClearQuest database will be able to use Rational DOORS for ClearQuest Interface.

1. Select the correct Rational DOORS Project in the left pane of the Rational DOORS Explorer.

2. Select **ClearQuest > Configure Project**.

   The **ClearQuest Database Configuration** dialog box opens, displaying the names of the available ClearQuest schema repositories in the top pane.

3. In the top pane of the dialog box, select the ClearQuest schema repository that contains the database you want to use.

A list of the databases that are available for that schema repository is displayed in the **Database Name** pane.

4. Select the ClearQuest database that is to be associated with the Rational DOORS project selected in the Rational DOORS explorer.

   The ClearQuest login dialog box is displayed.

5. Enter your ClearQuest username and password and click **Login**.

   You can configure the ClearQuest login to save your ClearQuest username and/or password by selecting the appropriate checkboxes:

   • If you save your username, you will be prompted for your password each time Rational DOORS for ClearQuest Interface accesses the ClearQuest database.

   • If you save your username and password, you will not be prompted to login again, unless the login fails.

   • You can login again during a session, or change your login options by selecting **ClearQuest > Login** from the explorer, or from the right click menu in a module.

   Rational DOORS for ClearQuest Interface retrieves the available ClearQuest database types for the current database and displays them in the lower panes of the dialog box. You use the **Enhancement Request Type Name** pane to associate a ClearQuest type with the Rational DOORS for ClearQuest Interface type **ER**, and the **Defect Type Name** pane to associate a ClearQuest type with the Rational DOORS for ClearQuest Interface type **Defect**.

6. Associate a ClearQuest Database type with the Rational DOORS for ClearQuest Interface type ER by selecting the ClearQuest database type from the list in the **Enhancement Request Type Name** pane. Associate a ClearQuest database type with the Rational DOORS for ClearQuest Interface type Defect by selecting the ClearQuest database type from the list in the **Defect Type Name** pane. You can create associations for either or both of the Rational DOORS for ClearQuest Interface types.

7. Click **Apply** to save the configuration information.

Configuring forms

You can configure a form for each ClearQuest type that is associated with a Rational DOORS for ClearQuest Interface type. When the form is configured it provides the interface between the Rational DOORS project and the associated ClearQuest database. For information on associating a ClearQuest type with a

Rational DOORS for ClearQuest Interface type, see "Configuring projects," on page 5.

To configure a form you must be one of the following Rational DOORS users:

- **Administrator** user

- **Database Manager**

- **Project Manager**

Once you have configured Rational DOORS for ClearQuest Interface, any Rational DOORS users with access to the associated ClearQuest database will be able to use Rational DOORS for ClearQuest Interface.

1. Select **ClearQuest > Configure Forms** in the Rational DOORS Explorer.

   The **ClearQuest Forms Configuration** dialog box is displayed. There are five tabs in the dialog box:

   - **Query Configuration**
   - **Report Configuration**
   - **Detail Configuration**
   - **Data Entry Configuration**
   - **View Fields**

2. Click to display the drop down **Form** list at the top of the ClearQuest Form Configuration dialog box. The ClearQuest types that were associated with Rational DOORS for ClearQuest Interface types during the Project Configuration are displayed. In this example they are EnhancementRequest and Defect.

3. Select the ClearQuest type you want to configure.

   Rational DOORS for ClearQuest Interface retrieves the field list for the selected ClearQuest type from the ClearQuest database. The field list is displayed in the **Available Field** list on each of the tabs in the ClearQuest Form Configuration dialog box. You can select which of these fields you want to be displayed on the Rational DOORS for ClearQuest Interface form.

4. Select the **Query Configuration** tab.

   You use the Query Configuration tab to define what ClearQuest fields are available to users when they use Rational DOORS for ClearQuest Interface to query the ClearQuest database. These fields are displayed on the **Query** tab of the Rational DOORS for ClearQuest Interface form.

- In the left pane, select the checkboxes of the ClearQuest fields you want to make available in Rational DOORS for ClearQuest Interface. They are displayed in the **Selected Item Order** list.

- The fields are displayed on the Rational DOORS for ClearQuest Interface form in the same order that they are displayed in the **Selected Item Order** list. To reorder the list, select a field and move it using the up and down arrows.

- The fields are displayed on the Rational DOORS for ClearQuest Interface form with their ClearQuest labels. To give a ClearQuest field a different label, select it in the **Selected Item Order** list and enter a new name in the **Displayed Name** field.

- Select the **Report Configuration** tab.

You can define what ClearQuest fields will be available in Rational DOORS for ClearQuest Interface as a result of a query. These are displayed as column headers in the upper pane of the **Report/Details** tab of the Rational DOORS for ClearQuest Interface form.

- In the left pane, select the checkboxes of the ClearQuest fields you want to make available in Rational DOORS for ClearQuest Interface. They are displayed in the **Selected Item Order** list.

- The fields are displayed on the Rational DOORS for ClearQuest Interface form in the same order as they are displayed in the **Selected Item Order** list. To reorder the list, select a field and move it using the up and down arrows.

- The fields are displayed on the Rational DOORS for ClearQuest Interface form with their ClearQuest labels. To give a ClearQuest field a different label, select it in the **Selected Item Order** list and enter a new name in the **Displayed Name** field.

5. Select the **Detail Configuration** tab.

   You can define what additional ClearQuest fields are available in Rational DOORS for ClearQuest Interface as a result of a query. These fields are displayed in the lower pane of the **Reports/Details** tab of the Integration form, and show the values of the record that is selected in the upper pane.

   - In the left pane, select the checkboxes of the ClearQuest fields you want to make available in Rational DOORS for ClearQuest Interface. They are displayed in the **Selected Item Order** list.

   - The fields are displayed on the Rational DOORS for ClearQuest Interface form in the same order as they appear in the **Selected Item**

Order list. To reorder the list, select a field and move it using the up and down arrows.

- The fields are displayed on the Rational DOORS for ClearQuest Interface form with their ClearQuest labels. To give a ClearQuest field a different label, select it in the **Selected Item Order** list and enter a new name in the **Displayed Name** field.

- By default, the ClearQuest fields in the **Details** section of the Rational DOORS for ClearQuest Interface form are editable. To disallow edits to a ClearQuest field select it in the **Selected Item Order** list and clear the **Editable** checkbox.

Note ClearQuest system generated fields, for example **id** or **Submitter** are not editable. The **Editable** checkbox is cleared and dimmed when fields of this type are selected.

6. Select the **Data Entry Configuration** tab.

   You can define what ClearQuest fields are available for editing in Rational DOORS for ClearQuest Interface as a result of a query. These are displayed on the **Edit Record** tab of the Rational DOORS for ClearQuest Interface form.

   - In the left pane, select the checkboxes of the ClearQuest fields you want to make available in Rational DOORS for ClearQuest Interface. They are displayed in the **Selected Item Order** list.

   - The fields are displayed on the Rational DOORS for ClearQuest Interface form in the same order as they appear in the **Selected Item Order** list. To reorder the list, select a field and move it using the up and down arrows.

   - The fields are displayed on the Rational DOORS for ClearQuest Interface form with their ClearQuest labels. To give a ClearQuest field a different label, select it in the **Selected Item Order** list and enter a new name in the **Displayed Name** field.

   - By default, the ClearQuest fields in the **Details** section of the Rational DOORS for ClearQuest Interface form are editable. To disallow edits to a ClearQuest field select it in the **Selected Item Order** list and clear the **Editable** checkbox.

   Note ClearQuest system generated fields, for example **id** or **Submitter** are not editable. The editable checkbox is cleared and dimmed when fields of this type are selected.

7. Select the **View Fields** tab.

Users can create links between ClearQuest records and Rational DOORS objects using Rational DOORS for ClearQuest Interface. The link information is stored in the Rational DOORS module in an attribute called **CQ Links**. This attribute is created automatically the first time a user creates a link. You can define what ClearQuest fields you want to be stored in the **CQ Links** attribute for each link that is created. The default is the ClearQuest record's **id** if no fields are identified.

- In the left pane, select the checkboxes of the ClearQuest fields you want to be stored in the **CQ Links** attribute for each link that is created.
- The fields are listed in the **CQ Links** attribute in the same order as they appear in the **Selected Item Order** list. To reorder the list, select a field and move it using the up and down arrows.

8. You can preview the form by clicking the **Preview Form** button.

The Rational DOORS for ClearQuest Interface form is generated, and the fields you specified during the configuration are displayed.

9. Click **Close** to close the Preview form.

   Note You can query the ClearQuest database using the Preview form, and records matching the query will display. However, you cannot edit any fields when in Preview mode.

10. Click **Save**, then **Close** in the ClearQuest Form Configuration dialog box.

4

Using Rational DOORS for ClearQuest Interface

This chapter describes:

- Querying the ClearQuest database
- Viewing query results
- Editing a ClearQuest record
- Linking a ClearQuest record to a Rational DOORS object
- Displaying link information in a Rational DOORS module
- Finding Rational DOORS objects linked to a ClearQuest record
- Finding ClearQuest records linked to a Rational DOORS object
- Deleting links

Querying the ClearQuest database

To use Rational DOORS for ClearQuest Interface you must have access to:

- The configured Rational DOORS project
- The ClearQuest database that has been associated with that project

To query the ClearQuest database:

1. In a formal module, right click and select **ClearQuest > Reports > Show Defect Query Form** or **ClearQuest > Reports > Show Enhancement Request Query Form**.

    The **ClearQuest Login** screen is displayed.

    Note If the current Rational DOORS project has not been configured for Rational DOORS for ClearQuest Interface, an error message is displayed. The Rational DOORS Administrator user, a Rational DOORS Database Manager or Rational DOORS Project Manager must run the **Configure Project** and **Configure Forms** options from the Rational DOORS Explorer before Rational DOORS for ClearQuest Interface can be used.

2. Enter your ClearQuest username and password.

You will be prompted to log into the ClearQuest database each time Rational DOORS for ClearQuest Interface accesses the ClearQuest database. You can choose to save your ClearQuest username and/or password when you log in by ticking the appropriate checkbox on the login dialog box.

- If you save your username you will be prompted for your password each time Rational DOORS for ClearQuest Interface accesses the ClearQuest database.
- If you save your username and password you will not be prompted to login unless the login fails.
- You can login again during a session, or change your login options by selecting **ClearQuest > Login** from the Rational DOORS explorer, or from the right click menu in a Rational DOORS module.

The Rational DOORS for ClearQuest Interface form opens, displaying the ClearQuest fields you can use to query the ClearQuest database. The ClearQuest fields that are displayed on the Rational DOORS for ClearQuest Interface form are those that were specified when Rational DOORS for ClearQuest Interface was configured.

3. Select the Query tab.

Specify the criteria for your query. Rational DOORS for ClearQuest Interface only supports **And** or **Or** logic when you enter a value in more than one field.

4. Click **Perform Query**.

Rational DOORS for ClearQuest Interface queries the ClearQuest database. When the information has been retrieved from the ClearQuest database, the Report/Details tab of the integration form is activated and the results of the query are displayed.

Viewing query results

The results of the query are listed in the upper section of the **Reports/Details** tab. When a record is selected in the list, the details of that record are displayed in the lower section of the tab.

Depending on how the Report/Details tab has been configured, you may be able to edit the fields in the lower section of the form. If a field in this section is read only, it is dimmed.

Editing a ClearQuest record

You can edit a ClearQuest record using the **Edit Record** tab on the integration form.

To edit a ClearQuest record:

1. Select the record you want to edit in the list on the **Report/Details** tab.

2. Select the **Edit Record** tab or click the **Edit** button.

The fields on the **Edit Record** tab are populated with values from the ClearQuest record you selected in the previous step. If a field on the **Edit Record** tab is read only, it is dimmed.

3. Make the required changes and click **Apply** to save them to the ClearQuest database.

Linking a ClearQuest record to a Rational DOORS object

To link a ClearQuest record to a Rational DOORS object:

1. Select the ClearQuest record on the **Report/Details** tab of the integration form dialog box.

2. In the formal module, select the Rational DOORS object to which you want to link the record.

3. Right click in the Rational DOORS formal module and select **ClearQuest > Linking > Create Link**.

The link is created.

Displaying link information in a Rational DOORS module

ClearQuest link information is stored in the Rational DOORS module in an attribute called **CQ Links**. This attribute is created automatically the first time a link is created between a ClearQuest record and a Rational DOORS object. The **CQ Links** attribute holds information about the ClearQuest record that is linked to the Rational DOORS object. The information held in the attribute depends on the ClearQuest fields selected when Rational DOORS for ClearQuest Interface is configured.

You can use Rational DOORS for ClearQuest Interface to create a view called **ClearQuest Status View**. The **CQ Links** attribute is displayed in a column in the **ClearQuest Status View**. To create this view select **ClearQuest > Status View > Create Status View** from the right click menu within the module.

You can refresh the view to show new link information by selecting **ClearQuest > Status View > Update Status View** from the right click menu. The latest link information for the current Rational DOORS project is retrieved from ClearQuest, and an information dialog is displayed stating that the CQ Status Files have been updated successfully.

Note Rational DOORS for ClearQuest Interface has to access the ClearQuest database to retrieve this information. You may be prompted to log into the ClearQuest database.

Finding Rational DOORS objects linked to a ClearQuest record

You can trace links from a ClearQuest record to a Rational DOORS object using Rational DOORS for ClearQuest Interface.

To trace linked Rational DOORS objects:

1. On the **Report/Details** tab of the integration form, select the ClearQuest record you want to check for links.

2. Click the **Requirements** button.

   Any Rational DOORS modules that contain objects that are linked to the selected record are opened in read-only mode and filtered to display only the linked objects.

Finding ClearQuest records linked to a Rational DOORS object

You can trace links from a Rational DOORS object to a ClearQuest record using Rational DOORS for ClearQuest Interface.

To trace linked ClearQuest records:

1. In the Rational DOORS formal module, select the **ClearQuest Status View** from the Views drop down list.

   ClearQuest link information is displayed in the CQ Links attribute column in this view.

2. Right click on an object that has a link to a ClearQuest record and select **ClearQuest > Reports > Show Enhancement Requests** or **ClearQuest > Reports > Show Defects**.

   The Rational DOORS for ClearQuest Interface form is opened. The **Report/Details** tab is displayed and ClearQuest records that are linked to the selected Rational DOORS object are listed.

Deleting links

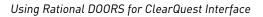**To delete links between Rational DOORS objects and ClearQuest records:**

1. Select the **ClearQuest Status View** from the drop down views list in the Rational DOORS formal module

2. Select the Rational DOORS object containing the link that you want to delete.

3. Right click and select **ClearQuest > Reports > Show Defects** or **ClearQuest > Reports > Show Enhancement Requests**.

   The Rational DOORS for ClearQuest Interface form is opened. The **Report/Details** tab is displayed and ClearQuest records that are linked to the selected Rational DOORS object are listed.

4. Select the ClearQuest record that is the target of the link you want to delete.

5. In the formal module right click on the Rational DOORS object that was selected in Step 2 and select **ClearQuest > Linking > Delete Link**.

   The link is deleted and the a message is displayed.

   Note The deleted link is displayed in the ClearQuest Status View until you update the view. To update the status view select **ClearQuest > Status View > Update Status View** from the right click menu in the formal module.

5   *Contacting support*

This chapter contains the following topics:

* Contacting IBM Rational Software Support

* Prerequisites

* Submitting problems

* Other information

Contacting IBM Rational Software Support

If the self-help resources have not provided a resolution to your problem, you can contact IBM Rational Software Support for assistance in resolving product issues.

Note If you are a heritage Telelogic customer, you can go to http://support.telelogic.com/toolbar and download the IBM Rational Telelogic Software Support browser toolbar. This toolbar helps simplify the transition to the IBM Rational Telelogic product online resources. Also, a single reference site for all IBM Rational Telelogic support resources is located at http://www.ibm.com/software/rational/support/telelogic/

Prerequisites

To submit your problem to IBM Rational Software Support, you must have an active Passport Advantage® software maintenance agreement. Passport Advantage is the IBM comprehensive software licensing and software maintenance (product upgrades and technical support) offering. You can enroll online in Passport Advantage from http://www.ibm.com/software/lotus/passportadvantage/howtoenroll.html.

* To learn more about Passport Advantage, visit the Passport Advantage FAQs at http://www.ibm.com/software/lotus/passportadvantage/brochures_faqs_quickguides.html.

* For further assistance, contact your IBM representative.

To submit your problem online (from the IBM Web site) to IBM Rational Software Support, you must additionally:

- Be a registered user on the IBM Rational Software Support Web site. For details about registering, go to http://www-01.ibm.com/software/support/.

- Be listed as an authorized caller in the service request tool.

Submitting problems

To submit your problem to IBM Rational Software Support:

1. Determine the business impact of your problem. When you report a problem to IBM, you are asked to supply a severity level. Therefore, you need to understand and assess the business impact of the problem that you are reporting.

   Use the following table to determine the severity level.

Severity	Description
1	The problem has a *critical* business impact: You are unable to use the program, resulting in a critical impact on operations. This condition requires an immediate solution.
2	This problem has a *significant* business impact: The program is usable, but it is severely limited.
3	The problem has *some* business impact: The program is usable, but less significant features (not critical to operations) are unavailable.
4	The problem has *minimal* business impact: The problem causes little impact on operations or a reasonable circumvention to the problem was implemented.

2. Describe your problem and gather background information, When describing a problem to IBM, be as specific as possible. Include all relevant background information so that IBM Rational Software Support specialists can help you solve the problem efficiently. To save time, know the answers to these questions:

   - What software versions were you running when the problem occurred?

     To determine the exact product name and version, use the option applicable to you:

- Start the IBM Installation Manager and click **File** > **View Installed Packages**. Expand a package group and select a package to see the package name and version number.
- Start your product, and click **Help** > **About** to see the offering name and version number.

- What is your operating system and version number (including any service packs or patches)?
- Do you have logs, traces, and messages that are related to the problem symptoms?
- Can you recreate the problem? If so, what steps do you perform to recreate the problem?
- Did you make any changes to the system? For example, did you make changes to the hardware, operating system, networking software, or other system components?
- Are you currently using a workaround for the problem? If so, be prepared to describe the workaround when you report the problem.

3. Submit your problem to IBM Rational Software Support. You can submit your problem to IBM Rational Software Support in the following ways:

- **Online**: Go to the IBM Rational Software Support Web site at https://www.ibm.com/software/rational/support/ and in the Rational support task navigator, click **Open Service Request.** Select the electronic problem reporting tool, and open a Problem Management Record (PMR), describing the problem accurately in your own words.

  For more information about opening a service request, go to http://www.ibm.com/software/support/help.html

  You can also open an online service request using the IBM Support Assistant. For more information, go to http://www-01.ibm.com/software/support/isa/faq.html.

- **By phone**: For the phone number to call in your country or region, go to the IBM directory of worldwide contacts at http://www.ibm.com/planetwide/ and click the name of your country or geographic region.

- **Through your IBM Representative**: If you cannot access IBM Rational Software Support online or by phone, contact your IBM Representative. If necessary, your IBM Representative can open a service request for you. You can find complete contact information for each country at http://www.ibm.com/planetwide/.

If the problem you submit is for a software defect or for missing or inaccurate documentation, IBM Rational Software Support creates an Authorized Program Analysis Report (APAR). The APAR describes the problem in detail. Whenever possible, IBM Rational Software Support provides a workaround that you can implement until the APAR is resolved and a fix is delivered. IBM publishes resolved APARs on the IBM Rational Software Support Web site daily, so that other users who experience the same problem can benefit from the same resolution.

Other information

For Rational software product news, events, and other information, visit the IBM Rational Software Web site on http://www.ibm.com/software/rational/.

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Index