

Version 2003.06.13 and later
Windows and UNIX



Installation Guide

Version 2003.06.13 and later
Windows and UNIX



Installation Guide

Note

Before using this information, be sure to read the general information under “Notices,” on page 61.

Version 2003.06.13 Edition (September 2004)

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Contents

Figures	v
--------------------------	----------

Tables	vii
-------------------------	------------

Preface	ix
--------------------------	-----------

About this manual	ix
Documentation roadmap	x
Typographical conventions	x
Contacting IBM Rational Customer Support.	xi

Chapter 1. Before you install. 1

New ClearQuest Web components	1
Configuration options	2
Simple configuration.	3
Extended configuration.	3
Optimized configuration	4
Hybrid configuration	5
System requirements.	6
Supported databases for ClearQuest Server on Windows	9
Supported database configurations for ClearQuest Server on UNIX	10
Prerequisite installations	12
Install supported Web browsers	12
Configuring Web browsers for New ClearQuest Web	12
Configuring the Internet Explorer browser	13
Configuring the Mozilla browser	13
Configuring the Safari browser	13
Install ClearQuest Administration Tools	13
Install ClearQuest MultiSite Administration Tools	13
Install a DB2 client	13
Compatibility issues	13
Rational products	13
Third-party products	13
Crystal Reports	14
Acrobat Reader	14
Language support	14
ClearQuest Server on Windows.	14
ClearQuest Server on UNIX	15

Chapter 2. Licensing New ClearQuest Web 17

Licensing Web clients	17
Installing the floating license server	17
Using existing licenses.	17
Entering floating keys on Windows	17
Entering floating keys on UNIX	18
Changing license servers when using floating licenses on UNIX	18

Chapter 3. Installing New ClearQuest Web on Windows 19

Install from Web download or CD.	19
--	----

Using the Rational Setup wizard	19
Before you start the Rational Setup wizard	19
Deploying IBM Rational products	20
Installing New ClearQuest Web from a Web download	20
Installing New ClearQuest Web from CD	20
Installing products from a release area	22
Canceling a product installation	22
Reinstalling New ClearQuest Web	22
Modifying the existing installation.	22
Repairing the existing installation	23
Uninstalling New ClearQuest Web.	23
Warnings and blocks	23

Chapter 4. Creating networkwide resources for New ClearQuest Web running on UNIX 25

Selecting the hosts for networkwide resources	25
Release host	25
Rational license server host	25
Setting up the release host	25
Selecting a release area location.	26
Making the release area accessible to all hosts	26
Architecture mnemonics	27
Loading the software distribution from CD.	27
Expanding the Web download file.	28
Running the site_prep script.	28
site_prep options	29
Allowing non-root users to install ClearQuest	30
Specifying regionwide product resources	30
Setting protections on files in the release area	30
Verifying site_prep selections	30
Making the release area accessible to all hosts	30
Upgrading the release area for the latest patch release	30
Publicizing the location of the release area	31
Installing individual hosts	31

Chapter 5. Installing New ClearQuest Web on UNIX hosts 33

Installation issues	33
ClearQuest considerations	33
Installation methods and models	33
The Standard installation model	34
The Full-Copy installation model	34
The deinstallation model	34
Compatibility between models	34
Order of installation	35
Selecting the products for installation.	35
Running the installation script	35
Invoking install_release	36

Chapter 6. Postinstallation tasks on Windows 41

Overview of the postinstallation	41
Creating a database alias on the ClearQuest administrator host and ClearQuest Server	41
Creating a DB2 database alias	41
Creating the ClearQuest databases.	42
Creating a schema repository	42
Creating a user database	43
Setting up the data code page	44
Connecting the ClearQuest Server to the database	44
Configuring a ClearQuest Server for reporting.	45
Configuring a multihost environment.	46

Chapter 7. Postinstallation tasks on UNIX. 47

Overview of the postinstallation	47
Creating a database alias on the ClearQuest administrator host	47
Creating a DB2 database alias on Windows.	47
Creating the ClearQuest databases.	48
Creating a schema repository	48
Creating a user database	49
Creating a database alias on the ClearQuest Server for a DB2 database	50

Setting up the ASCII code page.	51
Registering the database on the ClearQuest Server	51
Configuring a multihost environment.	52

Chapter 8. Configuring New ClearQuest Web 55

Prerequisites	55
Configuring RWP	55
Starting and stopping the ClearQuest Server on UNIX	55
Verifying the ClearQuest Web configuration	56
Administration tasks	56
Logging in to New ClearQuest Web	56
Performance and recommended configurations	57

Chapter 9. Upgrading from a previous release. 59

Appendix. Notices 61

Figures

1. Components of New ClearQuest Web	2	3. Extended configuration on Windows or UNIX	4
2. Simple configuration	3	4. Optimized configuration on Windows or UNIX	5

Tables

1.	Supported operating systems	6	5.	Installation tasks	20
2.	Hardware requirements	7	6.	Setting up export	26
3.	Supported databases for ClearQuest Server on Windows.	9	7.	Architecture mnemonics	27
4.	Supported databases for ClearQuest Server on UNIX	11	8.	cqreg options	51

Preface

IBM Rational ClearQuest is a highly flexible defect and change tracking system that captures and tracks all types of change, for any type of project.

About this manual

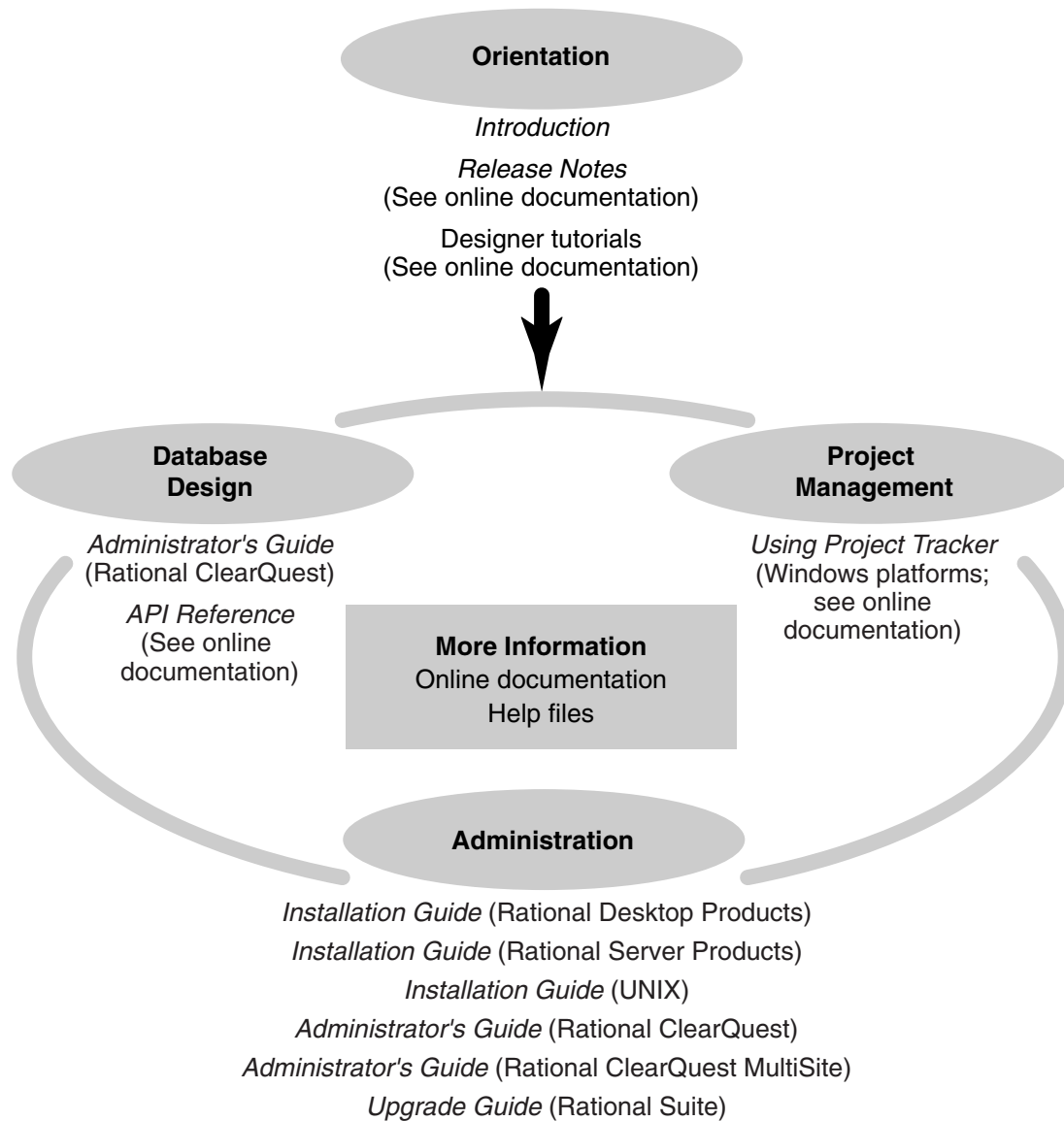
This manual is intended for database, system, and Web server administrators who are installing and configuring IBM Rational New ClearQuest Web. This manual assumes experience with Microsoft Windows and UNIX operating systems, system and database administration, and Web server administration.

Before you install IBM Rational New ClearQuest Web, IBM recommends that you read the following documents that are available on the *Rational Solutions for Windows Online Documentation* CD or at the IBM Publications Center at <http://www.ibm.com/shop/publications/order>.

- *IBM Rational ClearQuest Release Notes* provide the latest release information.
- *IBM Rational New ClearQuest Web Administrator's Guide* explains how to perform administrative tasks.

After you install the product, the online books for New ClearQuest Web are available on Windows or UNIX platforms on the ClearQuest Web Application host at `cquest-home-dir\common\rwp\webapps\cqweb\doc`.

Documentation roadmap



Typographical conventions

This manual uses the following typographical conventions:

- *ccase-home-dir* represents the directory into which the ClearCase Product Family has been installed. By default, this directory is */opt/rational/clearcase* on UNIX and *C:\Program Files\Rational\ClearCase* on Windows.
- *cquest-home-dir* represents the directory into which Rational ClearQuest has been installed. By default, this directory is */opt/rational/clearquest* on UNIX and *C:\Program Files\Rational\ClearQuest* on Windows.
- **Bold** is used for names the user can enter; for example, command names and branch names.
- A *sans-serif font* is used for file names, directory names, and file extensions.
- A **sans-serif bold font** is used for GUI elements; for example, menu names and names of check boxes.

- *Italic* is used for variables, document titles, glossary terms, and emphasis.
- A monospaced font is used for examples. Where user input needs to be distinguished from program output, **bold** is used for user input.
- Nonprinting characters appear as follows: <EOF>, <NL>.
- Key names and key combinations are capitalized and appear as follows: SHIFT, CTRL+G.
- [] Brackets enclose optional items in format and syntax descriptions.
- { } Braces enclose a list from which you must choose an item in format and syntax descriptions.
- | A vertical bar separates items in a list of choices.
- ... In a syntax description, an ellipsis indicates you can repeat the preceding item or line one or more times. Otherwise, it can indicate omitted information.

Note: In certain contexts, you can use “...” within a pathname as a wildcard, similar to “*” or “?”. For more information, see the **wildcards_ccase** reference page.

- If a command or option name has a short form, a “slash” (/) character indicates the shortest legal abbreviation. For example:

lsc/heckout

Contacting IBM Rational Customer Support

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

The IBM software support Internet site provides you with self-help resources and electronic problem submission. The IBM Rational Software Support Home page can be found at <http://www.ibm.com/software/rational/support/>.

Voice Support is available to all current contract holders by dialing a telephone number in your country (where available). For specific country phone numbers, go to <http://www.ibm.com/planetwide/>.

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

- Your name, company name, ICN number, 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 PMR number (if you are following up on a previously reported problem)

Chapter 1. Before you install

This chapter describes the supported configuration options, software and hardware platforms, the hardware and software requirements, and the language support.

- If you are upgrading from ClearQuest version 2003.06.00 to IBM Rational New ClearQuest Web version 2003.06.13, see Chapter 9, “Upgrading from a previous release,” on page 59.
- If you are installing IBM Rational New ClearQuest Web for the first time, you must complete the prerequisite installations for the ClearQuest database, as described in the *IBM Rational Software Server Products Installation Guide* or the *IBM Rational ClearQuest Product Family Installation Guide*.

New ClearQuest Web components

New ClearQuest Web consists of two components:

- ClearQuest Web Application

This component provides the HTTP interface to the Web client. It consists of the Rational Web Platform (RWP) and the ClearQuest Presentation Tier subcomponents. The ClearQuest Web Application component receives the Web client requests and forwards them to the ClearQuest Server by means of the Java Transport Layer (JTL). After the ClearQuest Server processes the request, the presentation tier generates the view for the Web client.

- ClearQuest Server

This component provides the ClearQuest core services to the Presentation Tier. The ClearQuest Server component consists of the ClearQuest Request Manager, ClearQuest Registry Server, and ClearQuest core subcomponents.

Figure 1 shows the component-level architecture of New ClearQuest Web.

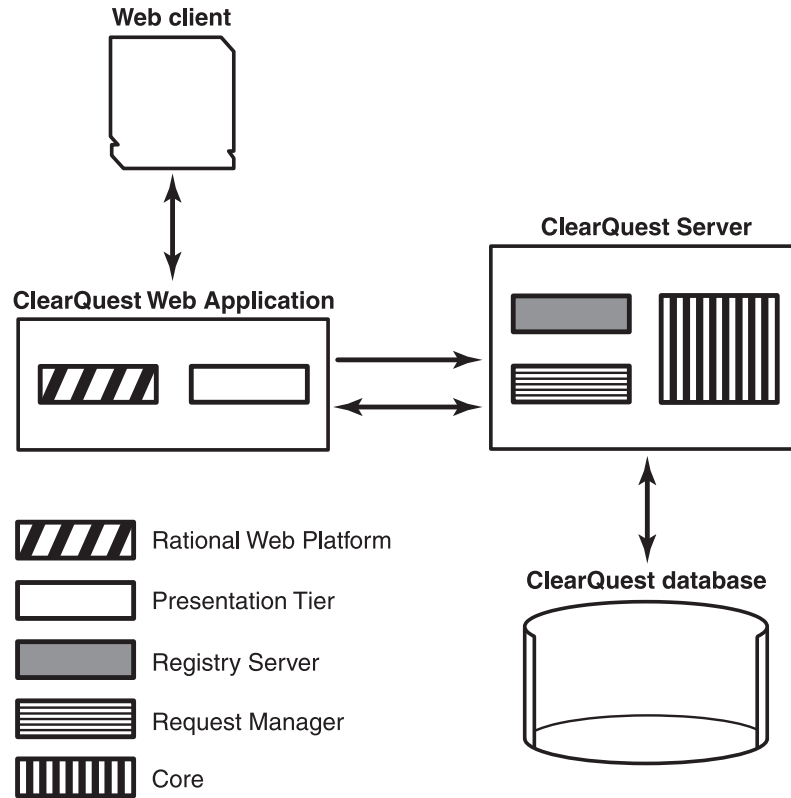


Figure 1. Components of New ClearQuest Web

Configuration options

You can deploy New ClearQuest Web in four basic configurations on Windows or UNIX:

- Simple
- Extended
- Optimized
- Hybrid

These configuration options differ in where and how the ClearQuest Web Application and ClearQuest Server components are deployed. The options provide flexibility for dealing with performance, load balancing, and failover considerations. For example, if there are multiple ClearQuest Server hosts, the load is balanced across all of them. In addition, if one ClearQuest Server host goes down, all subsequent requests for new sessions are automatically sent to another available ClearQuest Server host.

Support for multibyte characters and the functionality to generate charts and reports is available only on Windows. If you want to use these features, you must include at least one ClearQuest Server on a Windows computer in multihost UNIX configurations.

If you want to use the reporting functionality in a multihost configuration that includes more than one ClearQuest Server, the Crystal Enterprise Embedded Edition (CEEE) V10 from Business Objects must be installed and configured.

Simple configuration

In the simple configuration (Figure 2), the ClearQuest Web Application and the ClearQuest Server run on the same Windows or UNIX host. This configuration is the easiest to install and configure.

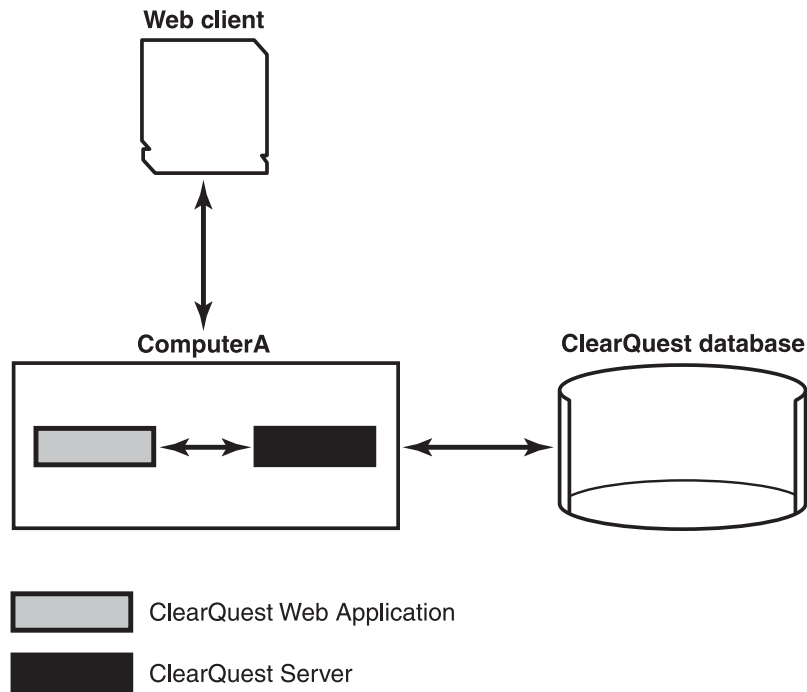


Figure 2. Simple configuration

Extended configuration

The extended configuration (Figure 3) adds ClearQuest Server on another computer to provide load balancing and failover support.

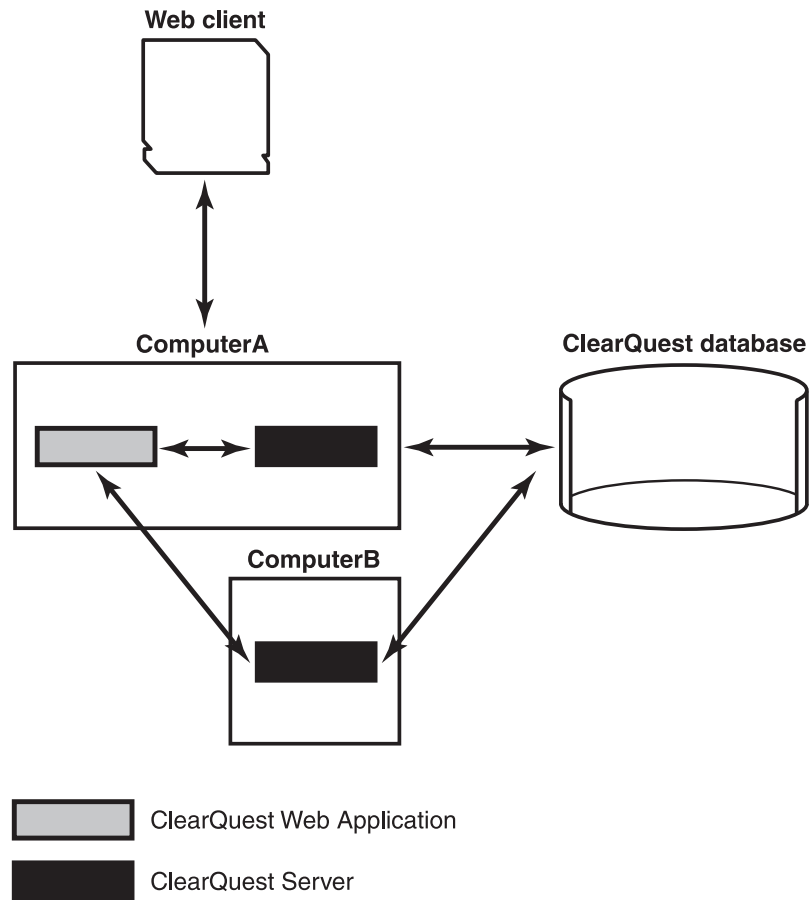


Figure 3. Extended configuration on Windows or UNIX

Optimized configuration

The optimized configuration (Figure 4) runs each ClearQuest Server on a separate host to ensure good performance when handling heavy loads.

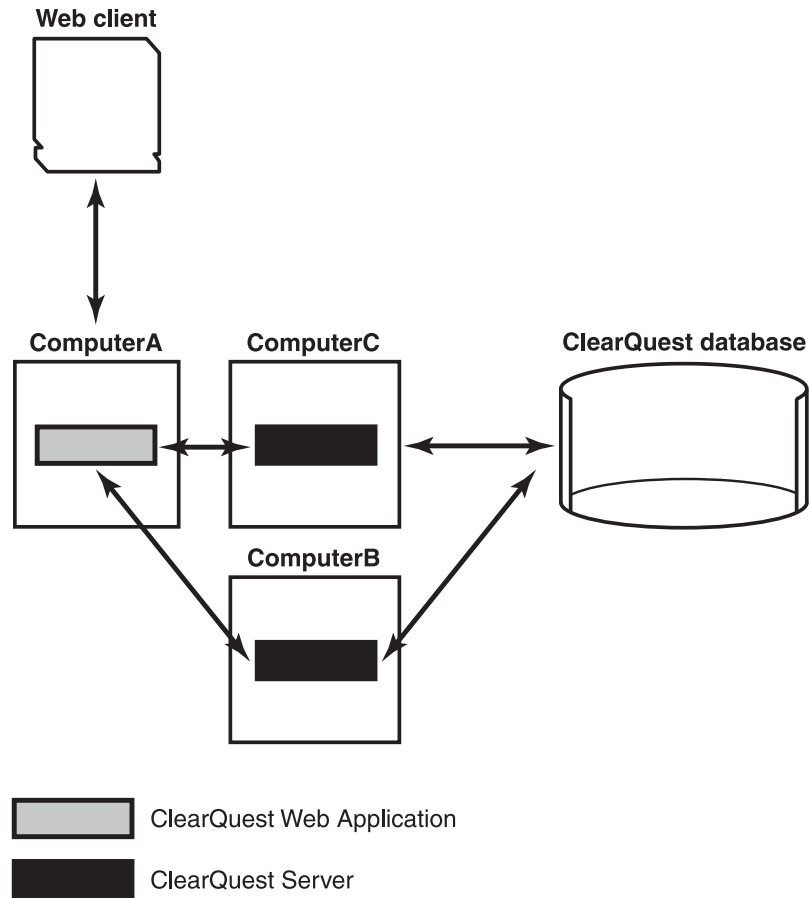


Figure 4. Optimized configuration on Windows or UNIX

Hybrid configuration

The hybrid configuration is the same as the Optimized configuration in Figure 4, except that the ClearQuest Web Application runs on UNIX and all ClearQuest Servers run on Windows. This option is recommended for sites that need to support multibyte characters, yet still need to run the ClearQuest Web Application on a UNIX Web server.

System requirements

Table 1 and Table 2 define the operating system and hardware requirements. For more information, see “Compatibility issues” on page 13.

Table 1. Supported operating systems

Component	Operating system
Web clients	Microsoft Windows XP Professional, Service Pack 1, 2 Microsoft Windows 2000 Professional, Service Pack 2, 3, 4, 5 Microsoft Windows 2003 Server, no Service Pack, Service Pack 1 Microsoft Windows 2000 Server, Service Pack 2, 3, 4, 5 Microsoft Windows 2000 Advanced Server, Service Pack 2, 3, 4, 5 Microsoft Windows NT Workstation, Service Pack 6a + SRP (Q299444) Supported Web browser: <ul style="list-style-type: none">• Microsoft Internet Explorer 5.5, Service Pack 2; 6.0 Service Pack 1, 2• Mozilla 1.6, 1.7
	Windows 98 2nd Edition Windows Me Windows XP Home Supported Web browser: <ul style="list-style-type: none">• Microsoft Internet Explorer 5.5, Service Pack 2• Microsoft Internet Explorer 6.0, Service Pack 1, 2• Mozilla 1.6, 1.7
	Mac OS X 10.2, 10.3 Supported Web browser: <ul style="list-style-type: none">• Safari 1.1
	Solaris 2.6, 7-9 HP-UX 11.0, QPK1100 HP-UX 11.11, GoldQPK11i and Bundle11i HP-UX 11i v2 AIX 4.3.3, 5.1, 5.2 Red Hat Linux 7.1–7.3, 8, 9 Red Hat Enterprise Linux 2.1, 3 SUSE Linux Enterprise Server, 8, 9 Supported Web browser: <ul style="list-style-type: none">• Mozilla 1.4 for Solaris, HP-UX, AIX, Red Hat Linux 7, 8. Mozilla 1.5 for Red Hat Linux 8, 9, Red Hat Enterprise Linux 2.1, 3, and SUSE Linux Enterprise Server, 8, 9.

Table 1. Supported operating systems (continued)

Component	Operating system
ClearQuest Web Application and ClearQuest Server Components	Supported platforms: <ul style="list-style-type: none"> • Microsoft Windows 2003 Server, no Service Pack, Service Pack 1 • Microsoft Windows 2000 Server, Service Pack 2, 3, 4, 5 • Microsoft Windows 2000 Advanced Server, Service Pack 2, 3, 4, 5 • Microsoft Windows NT 4.0 Server, Service Pack 6a + SRP (Security Rollup Package, Q299444) • Microsoft Windows NT Workstation, Service Pack 6a + SRP (Security Rollup Package, Q299444) • Solaris 2.6, 7, 8, 9 • HP-UX versions 11.0, QPK1100, 11.11, GoldQPK11i and Bundle11i, HP-UX 11i v2 • AIX 4.3.3, 5.1, 5.2 • Red Hat Linux 7.1–7.3, 8, 9 • Red Hat Enterprise Linux 2.1, 3 • SUSE LINUX Enterprise Server, 8, 9
ClearQuest database servers for ClearQuest Server on Windows	Supported vendor databases: <ol style="list-style-type: none"> 1. SQL Anywhere 5.05.1, 8.0.1, 8.0.2 2. Oracle 8.1.6, 8.1.7.3, 9.2, 10 3. DB2 7.2 (Fixpack 8 or higher), 8.1, DB2 UDB Express 8.1 4. SQL Server 7, 2000 <p>For information on supported databases on Windows operating systems, see Table 3 on page 9.</p>
ClearQuest database servers for ClearQuest Server on UNIX	Supported vendor databases: <ol style="list-style-type: none"> 1. Oracle 8.1.6, 8.1.7.3, 9.2, 10 2. DB2 7.2 (Fixpack 8 or higher), 8.1, DB2 UDB Express 8.1 3. SQL Server 7, 2000 <p>For information on supported databases on UNIX operating systems, see Table 4 on page 11.</p>
ClearQuest administrator host	<ul style="list-style-type: none"> • Microsoft Windows XP Professional, Service Pack 1, 2 • Microsoft Windows 2000 Server, Service Pack 2, 3, 4, 5 • Microsoft Windows 2000 Advanced Server, Service Pack 2, 3, 4, 5 • Microsoft Windows 2003 Server, no Service Pack, Service Pack 1 • Microsoft Windows 2000 Professional, Service Pack 2, 3, 4, 5 • Microsoft Windows NT 4.0 Server, Service Pack 6a + SRP (Security Rollup Package, Q299444) • Microsoft Windows NT Workstation, Service Pack 6a + SRP (Security Rollup Package, Q299444)

Table 2. Hardware requirements

Component	Hardware	Requirements
Web clients	Processor	<ul style="list-style-type: none"> • 32 bit • 128 MB RAM • 500 MHz
	Disk space	60 MB

Table 2. Hardware requirements (continued)

Component	Hardware	Requirements
ClearQuest Web Application, including RWP (Windows)	Processor	<ul style="list-style-type: none"> Dual 2+ GHz processor speed with a minimum of 500 MB RAM. Multiprocessor recommended for performance.
	Disk space	<ul style="list-style-type: none"> 200 MB at minimum
ClearQuest Server (Windows)	Processor	<ul style="list-style-type: none"> Dual 2+ GHz processor speed with a minimum of 500 MB RAM. Multiprocessor recommended for performance.
	Disk space	<ul style="list-style-type: none"> 200 MB at minimum
ClearQuest Web Application, including RWP (UNIX)	Processor	<ul style="list-style-type: none"> 32 bit 500 to 1 GB RAM 500 MHz or higher
	Disk space	<ul style="list-style-type: none"> Full-Copy install on Solaris 85 MB Standard install on Solaris 67 MB Full-Copy install on HP-UX 107 MB Standard install on HP-UX 89 MB Full-Copy install on AIX 81 MB Standard install on AIX 63 MB Full-Copy install on Red Hat Linux 100 MB Standard install on Red Hat Linux 83 MB Full-Copy install on SUSE LINUX 100 MB Standard install on SUSE LINUX 83 MB
ClearQuest Server (UNIX)	Processor	<ul style="list-style-type: none"> 32 bit 500 to 1 GB RAM 500 MHz or higher
	Disk space	<ul style="list-style-type: none"> Full-Copy install on Solaris 197 MB Standard install on Solaris 139 MB Full-Copy install on HP-UX 209 MB Standard install on HP-UX 163 MB Full-Copy install on AIX 296 MB Standard install on AIX 253 MB Full-Copy install on Red Hat Linux 192 MB Standard install on Red Hat Linux 152 MB Full-Copy install on SUSE LINUX 192 MB Standard install on SUSE LINUX 152 MB
Database server (Windows or UNIX)	Processor	<ul style="list-style-type: none"> 32 bit 500 to 1 GB RAM 500 MHz or higher 2x physical memory is the recommended swap space¹
	Disk space	<ul style="list-style-type: none"> 625 MB at minimum

Table 2. Hardware requirements (continued)

Component	Hardware	Requirements
ClearQuest administrator host (Windows)	Processor	<ul style="list-style-type: none"> 500-600 MHz or higher 256-512 MB RAM
	Disk space	<ul style="list-style-type: none"> 250 MB or higher disk space for a Rational point product
Note: 1. More memory generally improves responsiveness; it depends on the number of concurrent users, amount of data being requested, and the size of the database.		

Supported databases for ClearQuest Server on Windows

If the ClearQuest Server version 2003.06.13 or higher is running on a Windows platform, ClearQuest on Windows supports the operating systems and database vendors in Table 3. (ClearQuest MultiSite does not support DB2 UDB Express databases.)

Note: IBM recommends that the ClearQuest database server and the ClearQuest Web Application be located on different machines.

Table 3. Supported databases for ClearQuest Server on Windows

Operating system for database server	SQL Server		Oracle (32 bit)				DB2			SQL Anywhere		
	7.0 SP 4	2000 SP 2, 3	8.1.6	8.1.7.3	9.2	10 (64 bit)	UDB7.2 Fix pack 8	UDB 8.1	UDB Express 8.1	5.5.05	8.0.1	8.0.2
Windows 2003 Server, no SP, SP 1		X			X	X (32 bit)		X	X			X
Windows XP Pro, SP 1, 2					X	X (32 bit)				X	X	X
Windows 2000 Pro SP 2, 3, 4, 5										X	X	X
Windows 2000 Server, SP 2, 3, 4, 5	X	X	X	X	X	X (32 bit)	X	X	X	X	X	X
Windows 2000 Advanced Server, SP 2, 3, 4, 5	X	X	X	X	X	X (32 bit)	X	X	X	X	X	X
Windows NT 4.0 Server, SP 6a + SRP (Q2994444)	X	X	X	X	X	X (32 bit)	X	X	X	X	X	X
Windows NT 4.0 Work station, SP 6a + SRP (Q299444)	X	X	X	X	X	X (32 bit)	X	X	X	X	X	X

Table 3. Supported databases for ClearQuest Server on Windows (continued)

Operating system for database server	SQL Server		Oracle (32 bit)				DB2			SQL Anywhere		
	7.0 SP 4	2000 SP 2, 3	8.1.6	8.1.7.3	9.2	10 (64 bit)	UDB7.2 Fix pack 8	UDB 8.1	UDB Express 8.1	5.5.05	8.0.1	8.0.2
Solaris 2.6			X	X	X							
Solaris 7			X	X	X							
Solaris 8			X	X	X	X						
Solaris 9			X	X	X	X						
HP-UX 11.0, QPK1100			X	X	X							
HP-UX 11.11, Gold QPK11i, and Bundle11i			X	X	X	X						
AIX 4.3.3			X	X	X							
AIX 5.1				X	X	X	X	X				
AIX 5.2				X	X	X	X	X				
Red Hat Linux 7.1				X								
Red Hat Linux 7.2							X	X	X			
Red Hat Linux 7.3							X	X	X			
Red Hat Linux 8								X	X			
Red Hat Enterprise Linux 2.1				X	X	X (32 bit & 64 bit)		X	X			
Red Hat Enterprise Linux 3					X	X						
SUSE Enterprise LINUX 8				X	X	X (32 bit)		X	X			

Note: When using MultiSite with a ClearQuest Server running on Windows, Table 3 on page 9 describes the supported databases except that DB2 Express is not supported when using ClearQuest MultiSite.

Supported database configurations for ClearQuest Server on UNIX

When ClearQuest Server version 2003.06.00 with the clearquest_p2003.06.00-6 and clearquest_p2003.06.00-6 patches is running on UNIX, ClearQuest supports three vendor databases:

- SQL Server
- Oracle
- DB2

Regardless of which database you use, you can configure ClearQuest to support the following:

- The ClearQuest Administration Tools, which are installed only on a Windows operating system, to configure the schema repository and user databases for ClearQuest clients. For more information about installing the Administration Tools, see the *IBM Rational Software Server Products Installation Guide*.
- If you are using Rational ClearQuest MultiSite on UNIX, its administration tools (**multiutil** and its subcommands) can be installed on Windows. For more information about installing these Administration Tools, see the *IBM Rational Software Server Products Installation Guide*.
- The ClearQuest Server on UNIX is supported only for installation on an operating system that uses a U.S. English locale. ClearQuest databases that support a ClearQuest Server on UNIX must use the ASCII code page **20127**.

Each supported database has specific configuration requirements; see Table 4. (ClearQuest MultiSite does not support DB2 UDB Express databases.)

Note: IBM recommends that you host the database server and the ClearQuest Server on different machines.

Table 4. Supported databases for ClearQuest Server on UNIX

Operating system for database server	Oracle (32 bit)				SQL Server		DB2		
	8.1.6	8.1.7.3	9.2	10 (64 bit)	7.0, SP4	2000, SP 2, 3	UDB 7.2, Fix pack 8 or higher	UDB 8.1	UDB Express 8.1
Windows 2003 Server, no SP, SP 1			X	X (32 bit)		X		X	X
Windows XP Pro SP 1, 2			X	X (32 bit)					
Windows 2000 Pro SP SP 2, 3, 4, 5				X (32 bit)					
Windows 2000 Server, SP 2, 3, 4, 5	X	X	X	X (32 bit)	X	X	X	X	X
Windows 2000 Advanced Server, SP 2, 3, 4, 5	X	X	X	X (32 bit)	X	X	X	X	X
Windows NT 4.0 Work station SP 6a + SRP (Q2994444)	X	X	X	X (32 bit)	X	X	X	X	X
Windows NT 4.0 Server SP 6a + SRP (Q2994444)	X	X	X	X (32 bit)	X	X	X	X	X
Solaris 2.6	X	X	X						

Table 4. Supported databases for ClearQuest Server on UNIX
(continued)

Operating system for database server	Oracle (32 bit)				SQL Server		DB2		
	8.1.6	8.1.7.3	9.2	10 (64 bit)	7.0, SP4	2000, SP 2, 3	UDB 7.2, Fix pack 8 or higher	UDB 8.1	UDB Express 8.1
Solaris 7	X	X	X						
Solaris 8	X	X	X	X					
Solaris 9	X	X	X	X					
HP-UX 11.0, QPK1100	X	X	X						
HP-UX 11.11, Gold QPK11i and Bundle11i	X	X	X	X					
AIX 4.3.3	X	X	X						
AIX 5.1		X	X	X			X	X	X
AIX 5.2		X	X	X			X	X	X
Red Hat Linux 7.1		X							
Red Hat Linux 7.2							X	X	X
Red Hat Linux 7.3							X	X	X
Red Hat Linux 8								X	X
Red Hat Enterprise 2.1		X	X	X (32 bit & 64 bit)				X	X
Red Hat Enterprise 3.0		X	X	X					
SUSE LINUX Enterprise 8		X	X	X (32 bit)				X	X

Prerequisite installations

Install supported Web browsers

If you are planning to use the Web interface, all UNIX client hosts that access the Web must have the appropriate version of supported browsers. For more information, see Table 1.

Configuring Web browsers for New ClearQuest Web

To get full ClearQuest Web functionality for your New ClearQuest Web client, verify your Web browser is configured correctly. Follow the appropriate steps depending on whether your Web user is invoking an Internet Explorer, Safari, or Mozilla browser.

Configuring the Internet Explorer browser

No additional configuration is required to use New Rational ClearQuest with Internet Explorer; the default settings support the use of Javascript.

Configuring the Mozilla browser

To configure your Mozilla browser:

1. Start Mozilla from your desktop.
2. Select **Edit > Preferences** from the browser tool bar.
3. Under the **Advanced** node, click **Scripts & Plugins** and verify that the **Enable JavaScript** option for Navigator is enabled.
4. Click **OK**.

Configuring the Safari browser

To configure your Safari browser:

1. Start Safari from your desktop.
2. Click **Safari > Preferences** in the menu bar.
3. Click on the **Security** icon and select **Enable JavaScript**.
4. Close the preferences dialog and restart the browser.

Install ClearQuest Administration Tools

Install ClearQuest Administration Tools on a Windows host. These tools are required to set up the ClearQuest schema repository and user databases. For more information, see the *IBM Rational Suite Server Installation Guide*.

Install ClearQuest MultiSite Administration Tools

If you are using ClearQuest MultiSite, you can install ClearQuest MultiSite Administration Tools on a Windows host. You can use these tools to configure ClearQuest MultiSite. For installation information, see the *IBM Rational Software Server Products Installation Guide*.

Install a DB2 client

To access a DB2 database, DB2 client software must be installed on the administrator host and all ClearQuest Server hosts running on Windows or UNIX. To install DB2 client software, see the IBM DB2 documentation.

Compatibility issues

This section describes the compatibility issues of New ClearQuest Web release 2003.06.13 with other Rational products and third-party products.

Rational products

ClearQuest Web version 2003.06.00 or New ClearQuest Web version 2003.06.00 must be uninstalled before you can install New ClearQuest Web components.

Note: When uninstalling New ClearQuest Web version 2003.06.00 on UNIX, use the New ClearQuest Web version 2003.06.00 release area.

Third-party products

This section describes compatibility issues with third-party products.

Crystal Reports

In order to use reporting capabilities with New Rational ClearQuest Web you must install Crystal Enterprise Embedded Edition (CEEE) V10 from Business Objects. CEEE is a server based product and needs to be installed separately from New ClearQuest Web.

The copy of CEEE that Rational ClearQuest includes is an embedded reporting server for generating, viewing and interacting with Crystal reports over the web. This special version, *Crystal Enterprise Embedded Edition for Rational ClearQuest and TestManager*, is designed to perform adequately under moderate user loads. This means that as your user loads or report complexity increases you may experience slower response times. The Business Objects product line provides an upgrade path to unlock more performance as required. Small workgroups can choose *Crystal Reports Advanced Developer Edition* to speed up end user response times. Larger installations may prefer a full version of Crystal Enterprise which will support both larger and more complex deployments. For more information, visit <http://www.businessobjects.com/products/reporting/crystalreports>. The version of CEEE that IBM ships is limited in its performance capabilities.

Any reference to Crystal Reports in the ClearQuest product documentation applies only to copies of Crystal software that you have rightfully licensed.

Acrobat Reader

To read manuals in PDF format, you need Adobe Acrobat Reader, version 4.0 or later. Download the free Adobe Acrobat Reader from [Adobe.com](http://adobe.com).

Language support

The language support for New ClearQuest Web depends on whether the ClearQuest Server is installed on a host in a Windows or UNIX environment.

ClearQuest Server on Windows

You can install ClearQuest Server on these international operating systems:

- Simplified or Traditional Chinese
- Dutch
- French
- German
- Hebrew
- Italian
- Japanese
- Korean
- Swedish
- Simplified Chinese
- Traditional Chinese

All displays, menus, controls, wizards, reports, and user documentation are in U.S. English.

If you have a Traditional Chinese, Dutch, Hebrew, or Korean operating system, enter data (such as path names) in U.S. English or the ASCII character set.

If you have a Simplified Chinese, French, German, Italian, Japanese, or Swedish operating system, enter data in U.S. English or the native language character set.

In addition, support for Spanish and Brazilian Portuguese character sets has been added to ClearCase and ClearQuest and support for the Korean character set has been added to ClearCase.

Regional date, time, currency, and numbering conventions are also supported for both input and output.

ClearQuest Server on UNIX

The ClearQuest Server on UNIX is supported only for installation on an operating system that uses a U.S. English locale. ClearQuest databases that support ClearQuest Servers on UNIX must use the ASCII code page **20127**.

Chapter 2. Licensing New ClearQuest Web

IBM Rational New ClearQuest Web uses Rational Common Licensing, a model based on FLEXlm, the license management tool from GLOBETrotter Software, Inc. It requires Rational Suite or Rational ClearQuest licenses to run ClearQuest programs or issue ClearQuest commands.

This chapter explains licensing tasks.

Licensing Web clients

To use New ClearQuest Web, your license administrator must install floating licenses on a Rational license server. The ClearQuest Server requests a license key from this license server on behalf of each Web client.

You do not have to install a license key on a client's desktop to use the Web client.

Installing the floating license server

If you do not have a floating license server installed, see the version 2003.06.13 edition of the *IBM Rational Suite Server Installation Guide* for instructions. The license server can be set up on either a Windows or UNIX server, regardless of which platforms are to be used to run New ClearQuest Web.

Note: Do not install the license server on the same computer as any of the New ClearQuest Web components.

Using existing licenses

If you already use floating licenses for a ClearQuest version 2003.06.13, you can use them for New ClearQuest Web. Each New ClearQuest Web client will consume a license in the same manner as a client of ClearQuest.

Entering floating keys on Windows

You can import the floating licenses by using the Windows License Key Administrator (LKAD).

Note: You must have local administrator privileges on the License server before you can enter the license key using LKAD.

To use LKAD:

1. Start the LKAD (if not already running) by clicking **Start > Run > Rational Software > License Key Administrator** on the computer that runs the License server.
2. In the menu bar of the License Key Administrator, click **License Keys > Enter License Key**.
3. Select the **Floating license** option and click **Next**.
4. In the next dialog box, enter the following information (provided on the floating license certificate):
 - **Product**
 - **Expiration Date**

- **License Key**
 - **Quantity**
5. Click **Finish**. The License Key Administrator adds this information to the license key *.dat file in *cquest-home-dir\Rational\common* .

Entering floating keys on UNIX

The *IBM Rational ClearQuest Product Family Installation Guide* for patch release clearquest_p2003.06.00-6 explains how to set up a license server on UNIX.

Changing license servers when using floating licenses on UNIX

The *IBM Rational ClearQuest Product Family Installation Guide* for patch release clearquest_p2003.06.00-6 explains how change a license server name when using floating licenses on UNIX.

Chapter 3. Installing New ClearQuest Web on Windows

This chapter explains tasks for installing IBM Rational New ClearQuest Web components on Windows.

Install from Web download or CD

Determine if you will deploy New ClearQuest Web from a download or a CD.

Using the Rational Setup wizard

Whether you are obtaining New ClearQuest Web software from CD or Web download, use the Rational Setup wizard (`setup.exe`) to install ClearQuest Server and ClearQuest Web Application for New ClearQuest Web.

The Setup wizard does not display an error summary. The log file of the installation activities is `Rational_install.log`. You can use the log file to trace most installation errors.

By default, this log file is in the `TEMP` directory, whose location is set by the `TEMP` environment variable on the computer. To find the location, open a command window and type `echo %TEMP%` at the MS-DOS prompt. This folder and file may be hidden. To display the files in Windows Explorer, set **Show Hidden Files and Folders**.

Before you start the Rational Setup wizard

The following general requirements are necessary to run the Rational Setup wizard on the system.

- Uninstall New ClearQuest Web version 2003.06.00 or ClearQuest Web version 2003.06.00 . For information on upgrading from New ClearQuest Web 2003.06.00 or ClearQuest Web version 2003.06.00 to New ClearQuest Web version 2003.06.13, see the Upgrade chapter.

Note: When uninstalling ClearQuest Web version 2003.06.00, the entire ClearQuest product must be removed. From the Windows **Control Panel** select **Add/Remove Programs**, then select **Rational ClearQuest** and use the **Remove** option to completely remove the ClearQuest product.

- Stop all applications, including SQL Anywhere services, before you begin the installation.
- If IIS is installed on the host, disable the World Wide Web Publishing Service.
- You must have Windows administrator privileges on the local computer. Log in as one of the following users:
 - Local administrator
 - Member of the local administrator's group
 - Domain administrator who is a member of the local administrator's group
- Disable all virus protection software. These programs often run in the background and slow down the installation because they check each file that is installed.
- The Rational Setup wizard installs Microsoft Core Components and some additional files on the same drive as the operating system (often drive C), even

if you have specified an alternate drive for installation. Check available disk space; these files can require 5-15 MB of temporary disk space.

- Back up your registry and system directories.
- Turn off any user interface managers or environments that run on Microsoft Windows.

Deploying IBM Rational products

Use Table 5 to help you find the correct procedures for the deployment method that your administrator has selected for you. Read the sections in the specified order.

Table 5. Installation tasks

Method	See
Install directly from the <i>Rational Solutions for Windows CD</i> .	"Installing New ClearQuest Web from CD" on page 20
Install from Web download	"Installing New ClearQuest Web from a Web download" on page 20
Install from a release area on a network (using the standard configuration)	"Installing products from a release area" on page 22
Install from a release area on a network (customizing the client configuration for your desktop)	"Installing products from a release area" on page 22
Removing a product.	"Uninstalling New ClearQuest Web" on page 23
Cancel a product installation.	"Canceling a product installation" on page 22
Reinstall a product (modify or repair).	"Reinstalling New ClearQuest Web" on page 22

Installing New ClearQuest Web from a Web download

1. Log in as a user with Administrator rights on the local machine.
2. After you have downloaded ClearQuest version 2003.06.13 from the IBM Rational Web download site at <https://www6.software.ibm.com/reg/rational/rational-i>, click **Start > Run** and enter the path of the directory to which you extracted the contents of the Web download file followed by **setup.exe** (for example, `c:\temp\cqweb\setup.exe`).
3. The Welcome page to the Rational Setup wizard opens. Click **Next** to start the installation.
4. To install from a release area, see "Installing products from a release area" on page 22 and to run `setup.exe` on a desktop, see "Installing New ClearQuest Web from CD."

Installing New ClearQuest Web from CD

1. Log in as a user with Administrator rights on the local machine.
2. If installing from CD, the Setup wizard installs IBM Rational Software products. Your product shipment includes three Rational Solutions for Windows CDs:
 - Discs 1 and 2 provide the IBM Rational products to install.
 - Disc 3 provides IBM Rational product documentation.

Note: Interrupting an installation that is in progress may leave your computer in an indeterminate state. If you try to close the Setup wizard window while the installation is in progress, you are asked to confirm that you want to exit from the incomplete installation.

3. Insert the *Rational Solutions for Windows* Disc 1 into the computer's CD drive. The Setup wizard starts automatically.
If autorun is disabled on your computer, click **Start > Run** and enter *cd_drive:\Setup.exe* where *cd_drive* is the letter of the CD drive.
4. The Welcome page to the Rational Setup wizard opens. Click **Next** to start the installation.
5. The **Product Selection** page lists all products available for installation. Select the product you want to install.
6. On the Deployment Method page, accept the default selection of **Desktop installation from CD Image**. Click **Next**.
7. Click **Next** to continue; resolve any warnings on the Products Warning page. Click **Next**.
8. Accept the Rational Software license agreement in the License Agreement page. If you accept the license agreement, the installation wizard continues. If you do not accept the license agreement you cannot complete the installation. You must exit the Setup wizard by clicking **Cancel** and then **Finish**.
9. On the Destination Folder page, specify the directory where you want to install the New ClearQuest Web components. If you want to change the location, click **Change**. Click **Next**.
10. The Custom Setup page lists all features available for installation. By default, **New Rational ClearQuest Web** is an optional component and is not selected. Selecting **New Rational ClearQuest Web** installs both **ClearQuest Web Application** and **ClearQuest Server**. IBM recommends that the initial configuration include both components. To install additional ClearQuest Servers on other machines, run the install program on those machines and clear the **ClearQuest Web Application** check box. Click **Next**.
11. Click **Install** on the Ready to Install the Program page to begin the installation.
12. After the first part of the installation is complete, if you have installed the ClearQuest Web Application or ClearQuest Server component, a Restart Windows page opens; click **Restart**. After Windows restarts, the second part of the installation process begins after you log on.
13. If you have installed a ClearQuest Server component, after the second part of the installation process is complete, the License Key Administrator (LKAD) wizard opens. At this point, you need to specify the name of the floating license server. For more information about licensing, see Chapter 2.
14. In the LKAD wizard, select **Point to a Rational License Server** and click **Next**. Type the name of the license server with a ClearQuest floating license and click **Finish**.
15. If you have installed an additional ClearQuest Server component on another machine, the LKAD wizard will run at the end of each installation. Select **Point to a Rational License Server** and click **Next**. Type the name of the license server with a ClearQuest floating license and click **Finish**.
16. Perform postinstallation tasks for the New ClearQuest Web; see Chapter 7.

Installing products from a release area

When you are installing IBM Rational products on a desktop from a release area designated by your system administrator, in most cases, we recommend that you accept the defaults as presented on the installation screens. Speak to your administrator if you want to change the defaults chosen for you.

Installing from a release area includes the following tasks:

1. Your administrator creates one or more site defaults files in a release area using the IBM Rational Setup wizard (**Enterprise Deployment** option) or the Site Preparation wizard and informs you of the name of the site defaults file and network location of the release area or sends you a shortcut to the site defaults file.

Note: The instructions for setting up a release area and populating it with site defaults files are in the *IBM Rational Suite Server Installation Guide*.

2. Then, navigate to the release area and run the site defaults file or run the site defaults shortcut from your desktop client. This shortcut will run an installation on your desktop from the release area.

To install products from a release area, you can either use a standard configuration (the definitions set by your administrator), or you can customize the configuration for your desktop. For more information on customizing an installation from a release area, see *IBM Rational Suite Server Installation Guide*.

Canceling a product installation

If you click **Cancel** during the installation procedure or before the installation completes, the program returns your system to the state it was in before you started the Rational Setup wizard.

Note: If you do not have the correct version of Windows Installer software on your computer, the Rational Setup wizard installs it for you. Canceling the installation does not remove the updated version of Windows Installer, but, you might need to restart the computer.

Reinstalling New ClearQuest Web

If you need to reinstall New ClearQuest Web for any reason, you can modify or repair the installation by using Add or Remove Programs.

1. Log in as a user with Administrator rights on the computer on which you want to modify or repair the product installation.
2. Click **Start > Settings > Control Panel > Add or Remove Programs**.
3. Select the **ClearQuest** component and click **Change**.

Modifying the existing installation

This option enables you to specify which products and product features to install. The Setup wizard provides the Custom Setup page for you to clear or select features.

Click **Modify** and then click **Next** to select or clear features in the Custom Setup page. Click **Next** and then click **Install** to begin the installation.

Repairing the existing installation

This option enables you to repair a damaged registry or replace files that you may have inadvertently deleted. It does not repair incomplete or unsuccessful installations.

To make the repair, click **Repair**, click **Next**, and click **Install**. At the end of the operation, the status of the repair is displayed.

Uninstalling New ClearQuest Web

To uninstall New ClearQuest Web:

1. Log in as a user with Administrator rights on the local computer on which you want to uninstall the product.
2. Stop all New ClearQuest Web services. For information on stopping services, see the *IBM Rational New ClearQuest Web Administrator's Guide*.
3. Click **Start > Settings > Control Panel > Add or Remove Programs**.
4. Select the ClearQuest product and click **Modify** then click **Next** to clear New ClearQuest Web features in the Custom Setup page. Click **Next** and then click **Install** to begin the installation.

Warnings and blocks

If you encounter warnings or blocks during the installation procedure, consult the following table if you do not remember the entire message.

Warning / Block	Solution
You are attempting to install on an unsupported operating system.	IBM recommends that you install on a supported operating system. See "System requirements" on page 6 for a complete list of supported Operating Systems and service packs.
You are attempting to install on a system with an unsupported browser.	For a list of supported browsers, see Table 1 on page 6.
MDAC and ODBC	If the correct MDAC and ODBC drivers are not installed on your computer, the Setup wizard installs version 2.7 of the Microsoft Data Access Components (MDAC) and Open Database Connectivity (ODBC) drivers. For more information, read Microsoft Knowledge Base Article 216149 .
ClearQuest Web version 2003.06.00 or earlier	Uninstall ClearQuest Web version 2003.06.00 or earlier. Then restart the Rational Setup wizard.
New ClearQuest Web version 2003.06.00	Uninstall New ClearQuest Web version 2003.06.00. Then restart the Rational Setup wizard.

Chapter 4. Creating networkwide resources for New ClearQuest Web running on UNIX

To install New Rational ClearQuest Web running on UNIX on one or more hosts in your network, you must create a release area for ClearQuest version 2003.06.00 on a release host and then install patch releases `clearquest_p2003.06.00-6` and `clearquest_p2003.06.00-7` to the release area. This chapter explains how to do this.

Selecting the hosts for networkwide resources

You can have one host for the license server and the release host, or you can distribute the license server and release host across multiple hosts.

Release host

One host in the network acts as the networkwide release host, housing a release area that provides storage for the entire ClearQuest distribution: executable files, configuration files, online documentation, and so on. This host is essentially a file server. It must be highly available, (that is, with fast file-system access), visible to all other ClearQuest hosts, robust, and infrequently restarted.

Because ClearQuest programs do not need to run on it, the release host can be a nonsupported architecture, for example, a multi-tera-byte, mass-storage system. (If the release host has an architecture that ClearQuest supports, you can also install the ClearQuest Server and ClearQuest Web Application software there.)

If you are upgrading from any previous ClearQuest Web release, see Chapter 9.

Note: Most examples in this chapter refer to specific architectural mnemonics, such as `sun5`, or to specific releases, such 2003.06.00). You will have to substitute mnemonics or release numbers appropriate for your site.

If you have previously installed a ClearQuest 2003.06.00 release area, you can upgrade this release area to patch release `clearquest_p2003.06.00-6` and patch release `clearquest_p2003.06.00-7`. See “Upgrading the release area for the latest patch release” on page 30 for more information on applying a ClearQuest patch release to a ClearQuest version 2003.06.00 release area.

Rational license server host

One or more hosts in the network act as *license server hosts*, as described in Chapter 2. A license server host must be highly available; if it becomes unavailable, so do the licenses defined in its license database file. (A user may be able to continue working for about 15 minutes after the link to the license server host fails.)

If you are upgrading from a previous release, you can use your existing license server host. The ClearQuest licensing scheme has not changed; thus, no licensing-level changes are required on that host.

Setting up the release host

Setting up the release host involves the following steps:

1. Selecting a release area location. See “Selecting a release area location” on page 26.
2. Exporting the release area. See “Making the release area accessible to all hosts” on page 26.
3. Loading ClearQuest files from a CD or Web download to the release host’s file system. See “Expanding the Web download file” on page 28.
4. Running the **site_prep** script. See “Running the site_prep script” on page 28.
5. (Optional) Allowing non-**root** users to install New ClearQuest Web components on individual hosts. See “Setting protections on files in the release area” on page 30.
6. Setting the ownership and access modes of the release area and files. See “Setting protections on files in the release area” on page 30.
7. Verifying **site_prep** selections. See “Verifying site_prep selections” on page 30.
8. Ensuring that other hosts in the network can access the files. See “Making the release area accessible to all hosts” on page 30.
9. Publicizing the location of the release area. See “Publicizing the location of the release area” on page 31.

Selecting a release area location

To specify a release area location:

1. Log on as **root** to the computer you have selected to be the networkwide release host.
2. Create a directory for the release area on the host.

Note: You must select a location in a file system that is (or can be) NFS-mounted by all current and prospective ClearQuest Server or ClearQuest Web Application hosts. Those hosts must not mount the release-area file system with the **nosuid** option.

The file system must have sufficient disk space to hold the release area. For more information, see “System requirements” on page 6.

3. Either load the contents of the Web download for ClearQuest version 2003.06.00 to a designated directory for the release area, or if installing ClearQuest version 2003.06.00 from a CD, use the default directory for the release area is `/usr/clearquest_rls`. For more information, see “Expanding the Web download file” on page 28.

Making the release area accessible to all hosts

Make sure that the release host exports the directory `/usr/ network-release-area`. Table 6 provides the **export** commands.

Setting up the export is architecture specific. For details, see the standard reference pages for these files and programs.

Table 6. Setting up export

Architecture	Steps to export ClearQuest release area
Solaris SPARC	<ol style="list-style-type: none"> 1. Revise <code>/etc/dfs/dfstab</code> : share -F nfs -o options /usr/network-release-area 2. Enter command: #/usr/sbin/sharea11 -F NFS

Table 6. Setting up export (continued)

Architecture	Steps to export ClearQuest release area
HP-UX 11	<ol style="list-style-type: none"> 1. Revise /etc/exports : <i>/usr/network-release-area options</i> 2. Enter command: <i># /usr/sbin/exportfs -a other-options</i>
AIX	<ol style="list-style-type: none"> 1. Revise /etc/exports : <i>/usr/clearquest_rls options</i> 2. Enter command: <i># /usr/sbin/exportfs -a other-options</i>
Red Hat Linux or SUSE LINUX	<ol style="list-style-type: none"> 1. Revise /etc/exports : <i>/usr/clearquest_rls options</i> 2. Enter command: <i># /usr/sbin/exportfs -a other-options</i>

Architecture mnemonics

Table 7 provides the architecture mnemonic for supported platforms. The mnemonic is used as the name of the root of the release area for each platform or set of platforms.

Table 7. Architecture mnemonics

Architecture	Mnemonic	Sample mount command
Solaris SPARC	sun5	Not necessary (if Volume Manager is in use)
HP-UX 11	hp11_pa ¹	mount -F cdfs -r /dev/dsk/c3d0s2/cdrom
AIX	aix4_power	mount -o ro -v cdrfs /dev/cd0 /cdrom
Red Hat Linux or SUSE LINUX	rhat_x86	mount -r /dev/cdrom /mnt/cdrom
Notes: <ol style="list-style-type: none"> 1. When installing New ClearQuest Web components on a single host, you must use the release area appropriate for the architecture of that host. For example, if you have Solaris 2.6 on your host, you must install from the sun5 release area. 		

Loading the software distribution from CD

ClearQuest software is distributed on a ISO-9660 formatted CD (**High Sierra, hsfs, cdfs**).

To copy the software from the CD to the computer that will serve as the networkwide release host:

1. Log on as **root** to a host with a CD drive. Ideally, this is the networkwide release host itself. But if that host does not have a CD drive, log on to a host that is NFS-accessible to the networkwide release host.
2. (If necessary) Create a mount point directory for the CD:
mkdir /cdrom
3. Place the ClearQuest CD in the drive. On Solaris hosts, the volume manager mounts the CD automatically, so you can skip to Step on page 28.

4. Mount the CD. For the **mount** command for your platform, see “Architecture mnemonics” on page 27.

Note that CD drive names vary from host to host. Thus, you may need to adjust the **mount** command in Step 5.

5. If the CD drive is not on the networkwide release host, use NFS facilities to export the CD drive’s mount point from its host, and mount it on the networkwide release host. For pathnames of the **export** command for each architecture, see “Making the release area accessible to all hosts” on page 26. For example:

On the host with the CD drive:

```
# /usr/etc/exportfs -i -o ro /cdrom
```

On the release host:

```
# mount drive-host:/cdrom /cdrom
```

6. Log on as **root** to the networkwide release host. From the Bourne shell, run the script to load the ClearQuest software from the CD to the networkwide release host:

```
# cd /cdrom (most architectures)
```

or

```
# cd /cdrom/rational (on Solaris)
```

```
# sh copy_rel.sh
```

Expanding the Web download file

1. After you download the files for ClearQuest version 2003.06.00, copy the file you downloaded to the */release-area* directory on your release area host. (For information about selecting a host for a release area, see “Selecting the hosts for networkwide resources” on page 25.)

Note: The */release-area* directory requires 300 MB of disk space.

2. Change to the */release-area* directory,

```
cd /release-area
```
3. Expand the .gz file.

```
gunzip architecture.tar.gz
```
4. Extract files from the .tar file to the */release-area*.

```
tar -xvf architecture.tar
```
5. Remove the .tar file.

```
rm architecture.tar
```

Running the site_prep script

After the distribution has been loaded, run the **site_prep** script. **site_prep** is *required* to prepare the release area for installation of ClearQuest software on individual hosts. This script requires **root** user permissions and does the following:

- Specifies the license server host
- Specifies if there is e-mail notification
- Establishes a default e-mail address if e-mail notification is enabled
- Establishes ownership and sets permissions on all files in the release area

You must run **site_prep** for each architecture that your site supports. To guarantee access, log on to the release host as **root**. Change to the `install` subdirectory for the first supported architecture. For architecture mnemonics, see Architecture mnemonics.

For example:

```
# cd /usr/clearquest_r1s/v6.0
# cd sun5/clearquest/install
# ./site_prep
```

If you specify no options, **site_prep** does the following:

- Makes **root** owner of all files in the merged release area and disables writes to all files
- Prompts you to provide this information:
 - Name of *license server host*
 - Whether e-mail notification will be enabled on clients
 - When e-mail notification is enabled, the default e-mail address to send notification

The names you specify are supplied later as the defaults when **install_release** is run to install individual hosts.

Remember to run **site_prep** for any additional architectures your site supports.

site_prep options

Usage: **site_prep** **[-enable_non_root | -disable_non_root] [-enable_email | -disable_email] [-email_address email-notification-address] [-license_host license-host-name | -lh license-host-name] [-no_query | -nq] [-help] [-chmod]**

Option	Description
-enable_non_root	Allows non- root users to install this release.
-disable_non_root	Reverts to allowing only root users to install this release.
-enable_email	Enable e-mail notification. After e-mail is enabled, an e-mail notification address must be specified.
-disable_email	Disables e-mail.
-email_address email-notification-address	Specifies a default e-mail address to send notification.
-license_host license-host-name	Specifies location of license host.
-no_query	If values <i>are not specified using the command line</i> : sets license host to Unknown ; leaves the setuid mount options for install hosts unchanged; suppresses querying for other values not set in the command line.
-help	Displays this summary of site_prep options.
-chmod	Disables write access to release area files and directories.

Allowing non-root users to install ClearQuest

To allow New ClearQuest Web component installation without becoming **root** user use the **-enable_non_root** option. This is always done as a separate invocation of **site_prep**. To do so:

```
# site_prep -enable_non_root
```

If you have enabled non-**root** installation, enter the following command after all New ClearQuest Web hosts have been installed to eliminate the possibility of a security breach. (This is always done as a separate invocation of **site_prep**.) Rational has taken care to minimize the security risks of a non-**root** New ClearQuest Web installation, but this step provides extra assurance. To do so:

```
# site_prep -disable_non_root
```

Specifying regionwide product resources

If you do not specify the name of your license host in the **site_prep** command line, you are prompted to enter it. The **-no_query** option suppresses the query, but sets the values as specified in the command line. If this name is not specified, **-no_query** sets its value to Unknown .

When you install New ClearQuest Web on individual hosts (for supported platforms, see “System requirements” on page 6), this location is offered as the default. (If your network has several license server hosts, some or all users must override the default.)

Setting protections on files in the release area

If you did not load the Web download or CD files as **root**, the directories may have been created with write access enabled. The **-chmod** option corrects the write-protection problem.

Verifying site_prep selections

The **site_prep** script creates or edits a text file named **site.dat** under the **/clearquest** directory in each architecture-specific directory of the release area for which **site_prep** is run.

For each architecture that your site supports, examine **site.dat** to verify that there are no typographical errors in the information provided to **site_prep**. If the information is incorrect, re-run **site_prep** for that architecture.

Making the release area accessible to all hosts

Make sure that the exported directory on the release host, for example **/usr/release-area**, is accessible to all hosts where New ClearQuest Web components will be installed. For details, see Table 6.

Upgrading the release area for the latest patch release

Before installing or upgrading individual hosts, you must install the latest ClearQuest patch release to the release area. Download the latest ClearQuest patch release from the IBM Rational Download Center at <https://www6.software.ibm.com/reg/rational/rational-i> and refer to the *Patch Readme* for instructions on upgrading your ClearQuest version 2003.06.00 release area.

Publicizing the location of the release area

To install New ClearQuest Web components on specified hosts, you must provide the pathname for the ClearQuest release area.

Installing individual hosts

The setup of the networkwide release host is now complete. You have not installed any New ClearQuest Web components on this host; you have only loaded the ClearQuest software there, upgraded for the latest ClearQuest patch release, and set some default values to be used by the **install_release** program, which installs New ClearQuest Web components on individual hosts.

You can now install New ClearQuest Web components around the network. To install these components on individual hosts, see Chapter 5.

Chapter 5. Installing New ClearQuest Web on UNIX hosts

This chapter presents background information and instructions for installing New Rational ClearQuest Web components on UNIX hosts.

The **install_release** program handles the installation. **install_release** separates the choice of how the software is installed on the local system, called the installation model and method, from the choice of product options being installed.

Note: Substitute your local installation directory for *cquest-home-dir*, whenever you encounter it. If you choose to install to a directory that is different from the default, you cannot install to a directory named `/usr/atria/clearquest`.

Installation issues

This section explains installation issues for installing New ClearQuest Web components on individual hosts.

ClearQuest considerations

In addition to installing New ClearQuest Web on individual hosts, you must consider the following:

- To configure the ClearQuest schema repository and user databases for use by New ClearQuest Web clients, you must first install ClearQuest Administration Tools on a Windows host.
- If your ClearQuest database is DB2, you must install a DB2 database client on the ClearQuest administrator host and UNIX hosts where ClearQuest Server is installed. For more information, see “Creating a database alias on the ClearQuest administrator host” on page 47 and “Creating a database alias on the ClearQuest Server for a DB2 database” on page 50.

Installation methods and models

When you start **install_release**, you are presented with two installation methods:

- Select **Local Install** to install software on the local system (the one you are currently logged on to).
- Select **Local Deinstall** to remove software from the local system.

After you select the **Local Install** installation method, **install_release** prompts you to select an installation model:

- **Standard** — Regular installation, with links to the release area
- **Full-Copy** — Regular installation, with no links to the release area

The model you select is used for all selected components during a single session of **install_release**. You may want to review the models and their characteristics before running **install_release** for the first time.

The model you select determines whether the contents of *cquest-home-dir* are files or a combination of files and links to the release area). In choosing the model, you need to consider the amount of available storage and the expected patterns of use for the target computer:

- Does it need to operate when the network release area is unavailable?
- Does it have adequate local disk space for the New ClearQuest Web installation?
- Is *cquest-home-dir* on a read-only partition?

You may also want to consider the administrative advantages of each installation model.

- The **Standard** installation model is designed to be the best combination of features, reliability, performance, and disk space use.
- The **Full** installation model copies all of the software from the release area to the local host. It has no dependence on the network, but requires a large amount of disk space.

The Standard installation model

The **Standard** installation model creates *cquest-home-dir* on the target system as a directory and populates it with a combination of locally installed files and links to the release area. All shared libraries and critical executables are copied to the target system. Other files, such as Help and various nonessential scripts and utilities, are installed as links to the release area. Systems installed by using the **Standard** model perform all necessary New ClearQuest Web functions as long as the necessary ClearQuest databases and the license server hosts are accessible. There is no significant performance penalty associated with the **Standard** installation model, and it consumes significantly less disk space than the **Full-Copy** model.

IBM recommends the **Standard** installation model for any client with adequate disk space that does not have to operate when disconnected from the network.

The Full-Copy installation model

The **Full-Copy** installation model creates *cquest-home-dir* directory on the target system and populates it completely with files. Systems installed by using this model perform all New ClearQuest Web functions as long as the necessary ClearQuest databases and the license server hosts are accessible.

IBM recommends the **Full-Copy** installation model for any client with adequate disk space that does have to operate when disconnected from the network.

The deinstallation model

The **Local Deinstall** method provides a list of currently installed products and components to remove from the local system. All installed products or components can be deinstalled. Selecting a component for deinstallation also causes any other components that depend on that component to be deinstalled at the same time. After all the selections have been made, you are prompted to finish the deinstallation.

Local Deinstall preserves the ClearQuest database registry directories located at `/opt/rational/clearquest/CQDB_rgys` in `/var/tmp/Rational.preserve`.

Compatibility between models

If you want to change from one installation model to any other, IBM recommends that you deinstall your currently installed products before you install with the new model.

Note: The installation script warns you if you attempt to change models when installing new software.

Order of installation

IBM recommends that you deinstall any previously installed products before you install the new release. Deinstallation cleans up obsolete links and files.

It is important to install hosts in this order:

1. License server host, on which important site information is stored. (For more information, see Chapter 2, “Licensing New ClearQuest Web,” on page 17.)
2. ClearQuest Web hosts where New ClearQuest Web programs run.

Note: If New ClearQuest Web version 2003.06.00 is installed on an individual host, you must deinstall New ClearQuest Web version 2003.06.00 before beginning the installation.

Selecting the products for installation

install_release presents a list of products that you can install. This list is based on the contents of the networkwide release area from which **install_release** is being run and can include any ClearQuest product option for UNIX. In addition, you can make any of the following procedural selections:

Selection and name	Description
x Toggle expanded descriptions	Alternates display of list of products with descriptions and list of products without descriptions. By default, product descriptions are not displayed.
a Select all	Selects all listed components.
f Finish selection	Indicates that you have selected everything you want to install/deinstall and are ready to complete the installation/deinstallation.
r Reset selections	Clears everything.
q Quit	Quits install_release .

Select each product, one at a time, by typing its number. **install_release** responds by displaying the list with an asterisk to the left of each selected product.

Note: You can select products by entering multiple numbers separated by spaces. For example, you can enter the following on a single line:

1 f

Running the installation script

After you make all the preparatory selections, the host is ready for the installation of New ClearQuest Web components.

Before you begin to perform installations:

- Verify that the New ClearQuest Web release area is visible from every host to be installed. This is typically done through NFS mounts, symbolic links, or both.
- Verify that each host has adequate disk space for the installation. See “System requirements” on page 6.

After the **site_prep** script runs, default values for most **install_release** pathname and host name options are established. If you are not going to use the default choices that **site_prep** supplies to **install_release**, get the following information before you run **install_release**:

- The name of your license server host
- The port number on which Rational Web Platform listens for HTTP requests
- Account name for Rational Web Platform
- Group name for Rational Web Platform

Note: The following examples use the number sign (#) as the shell prompt; this is the standard prompt for the **root** user. The examples also assume use of the C shell for commands that set environment variables.

Invoking **install_release**

To invoke and run **install_release**:

1. Log on to the host to be installed. If non-**root** installation has been enabled at your site (see “Setting protections on files in the release area” on page 30), you can log on as a nonprivileged user. Otherwise, you must log on as **root** user.

Note: If the **site_prep** script was not run on the release area, **install_release** stops.

2. Go to the **install** subdirectory within the networkwide release area for the appropriate architecture:

```
# cd /net/bigserver/usr/release-area
    (typical release area)
```

```
# cd sun5/clearquest/install
    (architecture-specific location within release area)
```

For a list of architecture mnemonics, see “Architecture mnemonics” on page 27.

1. Start the **install_release** program:

```
# ./install_release
```

After a series of legal notices, you see the list of New ClearQuest Web product options that can be installed from this release area. In addition, you are informed of both the temporary and permanent locations of a log file of your installation. The log file includes everything you see during the installation and the results of your actions.

If the installation completes without generating informational messages, the log file in **/tmp** is deleted. If the installation fails, the log file is preserved in **/tmp**. If the installation completes but generates error or informational messages, the log file is placed in **/var/adm/rational/clearquest/log/Rational_install.time-stamp**.

You can type **q** at any prompt to quit the installation.

2. Choose your installation method (**Local Install** or **Local Deinstall**).
3. The Rational license agreement and the third-party license agreements are displayed if you have selected the **Local Install** installation method. When prompted to accept the terms of each of these license agreements, type **y** to continue with the installation.
4. Choose your installation model. All products installed in this session use the model you choose. Selecting the **Standard** model results in an optimal trade-off between reliability and performance.

5. Specify the directory on the local host in which to place the products that you plan to install.

Note: The directory location cannot be a networkwide release path. For example `/net/ machine-name/opt/rational/clearquest` is not a supported installation location.

Unless you have been instructed otherwise, IBM recommends that you take the supplied defaults [listed in square brackets] on all such prompts. Take the default by pressing RETURN.

6. Name the location of the networkwide release area. This is where any files or directories installed as symbolic links actually reside.
7. Now you are presented with a list, including New ClearQuest Web components, as the installation options.

```
1 : ClearQuest Server
2 : ClearQuest Web Application
3 : ClearQuest

a : Select all

f : Finish selection

x : Toggle expanded descriptions

r : Reset selections

q : Quit
```

Select a New ClearQuest Web component by number. To select the entire list, enter **a** for **all**. If you change your mind, enter **r** for **reset**. If you need more information, enter **x** to **expand** the component descriptions. When you have chosen all the products you want to install, enter **f** to indicate that you are finished making selections.

8. After you enter **f**, **install_release** displays a complete list of all the components you selected for installation. Note that some of these components were not on the list of selectable items. This list opens primarily so that it can be recorded in the log file. The components are then installed one at a time.

Unless you have been instructed otherwise, accept the defaults [in square brackets] by pressing RETURN at the prompt. The defaults on your system are the default values defined using **site_prep**. (See “Running the site_prep script” on page 28 to see where these default names come from.) For example:

Rational License Server Host[neon]:

If the **ClearQuest Web Application** option or the **Select all** option is selected, the default values for RWP configuration are displayed:

Port number on which RWP listens for HTTP requests [80]:

Account name for RWP [nobody]:

Group name for RWP [nobody]:

After all the questions have been answered, **install_release** has the information needed to perform the installations you have requested, as stated in the on-screen information.

The interactive portion of the installation is complete.

If you choose to continue, the previously listed components will be installed/updated.

Upon completion, the installation status will indicate whether there were problems, and provide reminders of postinstallation steps.

This WILL NOT include stopping all currently running ClearQuest Product Family software.

This WILL NOT require a restart of the system.

**** Enter 'quit' or 'no' to abort the installation
**** Enter 'yes' or press <RETURN> to continue ****

Continue installation?(yes, no, quit)[yes]:

At this point, you must decide whether to proceed with the installation. Until now, the system has not been modified (other than creating the log file). No files have been moved, and no processes have been affected.

The installation then prompts you for the directory name of the ClearQuest database registry directory.

Note: If you are reinstalling after deinstalling the product, the directory CQDB_rgy which holds the ClearQuest database registry directory (or directories) is moved from /var/tmp/Rational.preserve back to /opt/rational/clearquest .

ClearQuest Client/Server - Database Registry Menu

NOTE: The directory CQDB_rgys has been moved from /var/tmp/Rational.preserve back to /opt/rational/clearquest.

Please enter the ClearQuest database registry directory to use/reuse.

NOTE: For your ClearQuest database registry directory, you may specify an absolute path to a location outside the install area, or you may specify an absolute path to (or a relative path under) the designated default location /opt/rational/clearquest/CQDB_rgys.

The designated default location is the only allowable location within the install region for establishing ClearQuest database registry directories.

ClearQuest database registry directories created under the designated default location will be preserved upon deinstall, and reinstated upon reinstall.

For ClearQuest database registry directories specified in either the designated default location or outside the install area, the following is true:

If the specified ClearQuest database registry directory does not currently exist, the installer program will attempt to create it along with any other nonexisting directories specified in the path. Full read, write, and run permissions on the ClearQuest database registry will then be established by the installer program. If the specified ClearQuest database registry directory already exists, the installer program will require that it have full read and run permissions for the installation to complete successfully.

Invoking ClearQuest requires access to the ClearQuest database registry directory.

Therefore, if you plan to invoke ClearQuest from any other machines, you must provide a network accessible path.

Enter ClearQuest database registry directory
[/opt/rational/clearquest/CQDB_rgys/cqdb_registry]:

Note: If the directory you specify does not exist, the installation prompts you to create it.

After the installation is finished, read all messages displayed carefully. In particular, look for errors that may have occurred during installation. If there is a problem, look in the installation transcript log (/var/adm/rational/clearquest/Rational_install.*time-stamp*) for information about how to correct the errors. If you are unsure how to proceed, call IBM Customer Support.

Note: If the installation was aborted, the installation log may be in /tmp .

Chapter 6. Postinstallation tasks on Windows

This chapter describes postinstallation configuration procedures for New Rational ClearQuest Web components running on Windows. Before proceeding, ensure that a vendor database for ClearQuest is installed and configured as described in the *IBM Rational Software Server Products Installation Guide*.

Overview of the postinstallation

The postinstallation tasks for setting up one or more ClearQuest Servers and the ClearQuest Web Application running on Windows are as follows:

1. If using a DB2 database, create an alias on ClearQuest administrator host running on Windows and each ClearQuest Server running on Windows. See “Creating a database alias on the ClearQuest administrator host and ClearQuest Server” on page 41.
2. Set up the schema repository and the user databases. See “Creating the ClearQuest databases” on page 42.
3. Set up the data code page. See “Setting up the data code page” on page 44.
4. Set up ClearQuest database connections on each ClearQuest Server running on Windows. See “Connecting the ClearQuest Server to the database” on page 44.
5. If using ClearQuest reports, install the CEEE server on a ClearQuest Server host running on Windows or a independent host machine. See “Configuring a ClearQuest Server for reporting” on page 45.
6. If using a multihost environment, configure that environment. See “Configuring a multihost environment” on page 46.
7. Configure ClearQuest e-mail notification for New ClearQuest Web. See the *IBM Rational New ClearQuest Web Administrator's Guide*.

Creating a database alias on the ClearQuest administrator host and ClearQuest Server

For the ClearQuest administrator host and each ClearQuest Server to connect to a DB2 database, a DB2 client must be installed on the administrator host and each ClearQuest Server host and configured for a database alias.

Creating a DB2 database alias

To configure access to a DB2 database server host for the ClearQuest administrator host and each ClearQuest Server host running on Windows, you must use the DB2 Client Configuration Assistant to create an alias for each physical ClearQuest database.

1. For DB2 7.x, click **Start > IBM DB2 > Client Configuration Assistant**. For DB2 8.1, click **Start > IBM DB2 > Set-up Tools > Configuration Assistant**.
2. For DB2 7.x, in the Welcome dialog box, click **Add database**. Then, click **Search the network** and click **Next**. For DB2 8.1, in the DB2 Message dialog box, click **Yes**. Then, click **Search the network** and click **Next**.
3. Expand the Known Systems folder. If you see the database server host on which the ClearQuest database resides, expand it and select the database name for which you want to create an alias. Click **Next**.

Note: If you do not see the database server host you need, expand the Other Systems folder. If you still do not see the host, talk to your ClearQuest database administrator. There may be a network problem.

4. Type an alias name in the **Database alias** box. Type an optional comment in the **Comment** box and click Next.
5. Clear the **Register this database for ODBC** option, if it is selected. Click **Finish**.
6. A confirmation dialog box opens. To test access to the database, click **Test Connection** and type the user name in the **User ID** box and password in the **Password** box.

If the connection fails, attempt to connect by using the following command:

db2

```
db2> catalog TCPIP node node-name remote host-name server port-number
```

```
db2> catalog database database-alias at node node-name
```

```
db2> terminate
```

Note: When the administrator configures the connection to the DB2 database server, the database alias is entered in the **Database** box on the Maintenance Tool. For more information about using the Maintenance Tool, see “Creating a schema repository” on page 42 and “Creating a user database” on page 43.

Creating the ClearQuest databases

After you install New ClearQuest Web and create the empty vendor databases required, you must create the schema repository and the user databases. Initially, you can create a sample user database to learn more about the product. You can create your user databases later. For more information about configuring an evaluation database, see the *IBM Rational Software Server Products Installation Guide*.

Creating a schema repository

To create a new schema repository:

1. Click **Start > Programs > Rational Software > Rational ClearQuest > ClearQuest Maintenance Tool**.
2. Click **Schema Repository > Create**.
3. In the **Existing Connections** area, type a name for the schema repository connection, and press ENTER.
4. In the **Schema Repository Properties** area, select a vendor database from the **Vendor** list and type the full path for the database in the **Physical Database Name** box. Click **Next**.

Then enter the information required for your vendor database.

For SQL Anywhere

In the **Physical Database Name** box, type the path to the schema repository using a UNC style path. For example:

```
\\DevServer\Project\CQ_DBS\schema_repo.db
```

You can find the directory that contains the database by using Network Neighborhood, which preserves the UNC style path name. To do so:

- a. Type the name of the database server.
- b. Select the protocols used to communicate with the SQL Anywhere server.
- c. Type the database host name.

- d. Set the **Connect Options**. For more information using connect options, see *IBM Rational ClearQuest Documentation Supplement*.

For SQL_SERVER

- a. Type the database name for SQL Server schema repository in the **Physical Database Name** box.
- b. Type the name of the database server in the **Database Server Name** box.

Note: Each native client must be able to access this server host by using the name exactly as it opens in this entry.

- c. Type the database owner (DBO or Administrator) user name in the **Administrator Name** box.
- d. Type the password for the database owner (DBO or Administrator) in the **Administrator Password** box.
- e. Type connect options in the **Connect Options** box. For more information using connect options, see *IBM Rational ClearQuest Documentation Supplement*.

For ORACLE

- a. Type the name Oracle server host name in the **Server** box.
- b. Type the name of the Oracle database instance for the schema repository in the **SID** box.
- c. Type the password for the user name in the **Password** box.
- d. Type the connect options in the **Connect Options** box. The default connect option is **LOB_TYPE=CLOB**; CLOB (Character Large Object) supports multiline searching for Oracle databases. For more information on connect options, see *IBM Rational ClearQuest Documentation Supplement*.

For DB2

1. Select DB2 in the **Vendor** box.
2. Type the database alias name (database alias pointing to the DB2 database).
3. Type the DB2 login created for the schema repository.
4. Type the password for the login.
1. Click **Next**.
2. In the schema definition area:
 - a. (Optional) Select the **Create sample database** option.
 - b. In the **Schema to use** list, select the schema to use. For information about the schema options, see the *Administrator's Guide* for Rational ClearQuest.
 - c. In the **Database Name** box, type the database name for the schema repository.
 - d. In the **Description** box, type a description.
3. (Optional) If the **Create sample database** option was selected, in the **Sample User Database** area, enter the properties of the database designated for the sample database.
4. Click **Finish**. In the **Status** dialog box, verify the successful creation of the schema repository.

Creating a user database

After you create a schema repository, you can create ClearQuest user databases.

1. Click **Start > Programs > Rational Software > Rational ClearQuest > ClearQuest Designer**.

2. In the Schema Repository dialog box, select the schema repository to use for creating a user database.
3. In the ClearQuest Designer Login dialog box, log on with the default ClearQuest administrator login name and password. The default user name is **admin**; the password is Null and should be left blank. You can change this password and create a new login at your earliest convenience. Click **OK**.
4. When the Open Schema dialog box opens, click **Cancel**.
5. Click **Database > New Database**.
6. Type a logical database name in the **Logical Database Name** box for the user database you want to create. This name can be up to five characters. Click **Next**.
7. Select the vendor database you plan to use and type the properties appropriate for that vendor. (For more information, see “Creating a schema repository” on page 42.) Then, click **Production Database** or **Test Database**. Click **Next**.
8. Click **Next** to accept the default **Timeout** and **Poll Interval** polling parameters.
9. Select a schema with which to associate your user database.
10. Click **Finish**.

Setting up the data code page

After you create a new ClearQuest schema repository, you must set the ClearQuest data code page value to an appropriate value. If you do not set the data code page value, the default value of ASCII is used and your databases are limited to ASCII (printable English characters) data entry only.

For more information about setting the data code page, see the *Administrator's Guide* for Rational ClearQuest.

Connecting the ClearQuest Server to the database

After installing ClearQuest Server on Windows, you will need to connect to an existing schema repository.

Note: If you are using DB2 as your ClearQuest database, you will need to install the DB2 database client software on the ClearQuest Server host and create a database alias before connecting to ClearQuest. For more information, see “Creating a database alias on the ClearQuest administrator host and ClearQuest Server” on page 41.

To connect the ClearQuest Server on Windows to a schema repository, use the ClearQuest Maintenance Tool that is installed with the ClearQuest Server.

1. On the ClearQuest Server host, click **Start > Programs > Rational Software > Rational ClearQuest > ClearQuest Maintenance Tool**.
2. Click **Connection > New**.
3. In the Existing Connections area, name the connection by typing a name in the highlighted item.
4. In the Schema Repository Properties group box, specify the properties of the vendor database designated for the schema repository. Select a vendor database from the drop-down list and type the required vendor database properties.

Database Properties

SQL_ANYWHERE

- Type the entire path (in UNC format) to the schema repository. For example:

`\\DevServer\ProjectShare\CQ_DBS\schema_repo.db`

To find the directory that contains the database, use the Network Neighborhood to preserve the UNC style path name. Then, enter the following:

- Type the name of the physical database.
- Type the name of the database server.
- Type the protocols used to communicate with the SQL Anywhere server.
- Type the database host name.
- Type the connect options.

SQL_SERVER

- Type the SQL Server database name for the database that contains the schema repository.
- Type the name of the database server.
- Type the schema repository or read-only user login.
- Type the password for the schema repository or read-only login.
- Type the connect options. For more information using connect options, see *IBM Rational ClearQuest Documentation Supplement*.

ORACLE

- Type the Oracle server name and the SID (database instance name) for the database containing the schema repository.
- Type the Oracle login created for the schema repository.
- Type the password for the login.
- Type the connect options. For more information using connect options, see *IBM Rational ClearQuest Documentation Supplement*.

DB2

- Select DB2 in the **Vendorbox**.
- Type the database alias name (database alias pointing to the DB2 database).
- Type the DB2 login created for the schema repository.
- Type the password for the login.

5. Click **Finish** to complete the connection.

Note: The ClearQuest Server refreshes its internal list of database connections every 10 minutes. You can either wait for the refresh or restart the ClearQuest Request Manager.

Configuring a ClearQuest Server for reporting

To configure a ClearQuest Server running on Windows for reporting:

1. Install the CEEE on either the same host as ClearQuest Server or use a separate host.

2. Configure ClearQuest Server to point to the CEEE. You can configure multiple ClearQuest Server hosts to point to the same CEEE. Customer can also upgrade their CEEE server to a better performing version by purchasing ?? form BOBJ. There are limitation as to how many CEEE can install in an New ClearQuest Web deployment.
3. Review the Business Objects End User License agreement they accepted when installing CEEE to understand the terms and conditions and usage of CEEE included with ClearQuest for use with ClearQuest Web Server.

Configuring a multihost environment

The ClearQuest Server can be deployed on one or more hosts. One advantage of a multihost deployment of the ClearQuest Server is for load balancing and failover. If more than one ClearQuest Server supports the ClearQuest Web Application, the load is balanced across all the ClearQuest Servers. If one of the ClearQuest Servers goes down, all subsequent requests for the new sessions are sent to the other available servers. To configure load balancing and failover, you must modify the `jtl.properties` file on the hosts where the ClearQuest Web Application and ClearQuest Servers are installed.

For instructions about configuring a multihost environment, see the *IBM Rational New ClearQuest Web Administrator's Guide*.

Chapter 7. Postinstallation tasks on UNIX

This chapter describes postinstallation configuration procedures for New Rational ClearQuest Web components running on UNIX. Before proceeding, ensure that a vendor database for ClearQuest is installed and configured as described in the *IBM Rational ClearQuest Product Family Installation Guide*.

Overview of the postinstallation

The postinstallation tasks for setting up one or more ClearQuest Servers and the ClearQuest Web Application running on UNIX are as follows:

1. If using a DB2 database, create an alias on the ClearQuest administrator host. See “Creating a database alias on the ClearQuest administrator host” on page 47.
2. Set up the schema repository and the user databases. See “Creating the ClearQuest databases” on page 48.
3. If using a DB2 database, use the DB2 client to create a DB2 alias on all ClearQuest Servers running on UNIX. See “Creating a database alias on the ClearQuest Server for a DB2 database” on page 50.
4. Set up an ASCII code page for the ClearQuest environment on UNIX. See “Setting up the ASCII code page” on page 51.
5. Set up ClearQuest database connections on each ClearQuest Server. See “Registering the database on the ClearQuest Server” on page 51.
6. If using a multihost environment, configure that environment. See “Configuring a multihost environment” on page 52.
7. Configure ClearQuest e-mail notification for New ClearQuest Web. See the *IBM Rational New ClearQuest Web Administrator's Guide*.

Creating a database alias on the ClearQuest administrator host

For the ClearQuest administrator host to connect to a DB2 database, a DB2 client must be installed on that host and configured for a database alias.

Creating a DB2 database alias on Windows

To configure access to a DB2 database server host for the ClearQuest administrator host running on Windows, you must use the DB2 Client Configuration Assistant to create an alias for each physical ClearQuest database.

1. For DB2 7.x, click **Start > IBM DB2 > Client Configuration Assistant**. For DB2 8.1, click **Start > IBM DB2 > Set-up Tools > Configuration Assistant**.
2. For DB2 7.x, in the Welcome dialog box, click Add database. Then, click **Search the network** and click **Next**. For DB2 8.1, in the DB2 Message dialog box, click **Yes**. Then, click **Search the network** and click **Next**.
3. Expand the Known Systems folder. If you see the database server host on which the ClearQuest database resides, expand it and select the database for which you want to create an alias. Click **Next**.

Note: If you do not see the database server host you need, expand the Other Systems folder. If you still do not see the host, talk to your ClearQuest database administrator. There may be a network problem.

4. Type an alias in the **Database alias** box. Type an optional comment in the **Comment** box and click Next.
5. Clear the **Register this database for ODBC** option, if it is selected. Click **Finish**.
6. A confirmation dialog box opens. To test access to the database, click **Test Connection** and type the user name in the **User ID** box and password in the **Password** box.

If the connection fails, attempt to connect by using the following command:
db2

```
db2> catalog TCPIP node node-name remote host-name server port-numberdb2>
catalog database database-alias at node node-namedb2> terminate
```

Note: When the administrator configures the connection to the DB2 database server, the **database alias** is entered in the **Database Alias** box on the Maintenance Tool. For more information about using the Maintenance Tool, see “Creating a schema repository” on page 48 and “Creating a user database” on page 49.

Creating the ClearQuest databases

After you install New ClearQuest Web and create the necessary empty vendor databases, you must create the schema repository and the user databases. Initially, you can create a sample user database to learn more about the product. You can create your user databases later. For more information about configuring an evaluation database, see the *IBM Rational Software Server Products Installation Guide*.

Creating a schema repository

To create a new schema repository:

1. Click **Start > Programs > Rational Software > Rational ClearQuest > ClearQuest Maintenance Tool**.
2. Click **Schema Repository > Create**.
3. In the **Existing Connections** area, type a name for the schema repository connection, and press ENTER.
4. In the **Schema Repository Properties** area, select a vendor database from the **Vendor** list and type the full path for the database in the **Physical Database Name** box. Click **Next**.

Then enter the information required for your vendor database.

For SQL_SERVER

- a. Type the database name for SQL Server schema repository in the **Physical Database Name** box.
- b. Type the name of the database server in the **Database Server Name** box.

Note: Each native client must be able to access this server host by using the name exactly as it opens in this entry.

- c. Type the database owner (DBO or Administrator) user name in the **Administrator Name** box.
- d. Type the password for the database owner (DBO or Administrator) in the **Administrator Password** box.
- e. Type the Connect options. For more information using connect options, see *IBM Rational ClearQuest Documentation Supplement*.

For ORACLE

- a. Type the server name in the **Server** box.
- b. Type the SID or database instance name in the **SID** box.
- c. Type the user name you created for the schema repository in the **User Name** box.
- d. Type the password for the user name in the **Password** box.
- e. Type the connect options in the **Connect Options** box. The default connect option is **LOB_TYPE=CLOB**; CLOB (Character Large Object) supports multiline searching for Oracle databases. For more information using connect options, see *IBM Rational ClearQuest Documentation Supplement*.

For DB2

1. Select DB2 in the **Vendor** box.
2. Type the database alias name (database alias pointing to the DB2 database).
3. Type the DB2 login created for the schema repository.
4. Type the password for the login.
1. Click **Next**.
2. In the schema definition area:
 - a. (Optional) Select the **Create sample database** option.
 - b. In the **Schema to use** list, select the schema to use. For information about the schema options, see the *Administrator's Guide* for Rational ClearQuest.
 - c. In the **Database Name** box, type the database name for the schema repository.
 - d. in the **Description** box, type a description.
3. (Optional) If you selected the **Create sample database** option in the **Sample User Database** area, enter the properties of the database designated for the sample database.
4. Click **Finish**. In the **Status** dialog box, verify the successful creation of the schema repository.

Creating a user database

After you create a schema repository, you can create ClearQuest user databases.

1. Click **Start > Programs > Rational Software > Rational ClearQuest > ClearQuest Designer**.
2. In the Schema Repository dialog box, select the schema repository to use for creating a user database.
3. In the ClearQuest Designer Login dialog box, log on with the default ClearQuest administrator login name and password. The default user name is **admin**; the password is Null and should be left blank. You can change this password and create a new login at your earliest convenience. Click **OK**.
4. When the Open Schema dialog box opens, click **Cancel**.
5. Click **Database > New Database**.
6. Type a logical database name in the **Logical Database Name** box for the user database you want to create. This name can be up to five characters. Click **Next**.
7. Select the vendor database you plan to use and type the properties appropriate for that vendor. (For more information, see "Creating a schema repository" on page 48.) Then, click **Production Database** or **Test Database**. Click **Next**.

8. Click **Next** to accept the default **Timeout** and **Poll Interval** polling parameters.
9. Select a schema with which to associate your user database.
10. Click **Finish**.

Creating a database alias on the ClearQuest Server for a DB2 database

To access a DB2 database, the DB2 client software must be installed on each ClearQuest Server host running on UNIX. For installation information, see the IBM DB2 product documentation. You must create database aliases on the ClearQuest Server host running on UNIX to access a DB2 database.

Note: Creating a database connection between a DB2 8.1 client and DB2 7.2 Server is not allowed. You cannot make a connection between a DB2 8.1 client and DB2 7.2 server. The following are the supported combinations:

- DB2 7.x client to DB2 7.x server
- DB2 7.x client to DB2 8.1 server
- DB2 8.1 client to DB2 8.1 server

Using any other combination of client and server versions is neither supported nor recommended.

When creating the database alias for DB2, the database alias name must be identical on all ClearQuest Server hosts running on UNIX hosts that use it. For example, if the DB2 database alias **cqdb** is created on one ClearQuest Server host, a second ClearQuest Server host running on UNIX must create the DB2 database alias **cqdb**.

After the DB2 client software is installed, perform the following steps:

1. Log on to the ClearQuest Server host as a user with privileges to modify the database instance (perhaps the UNIX user who created the DB2 instance).
2. Use the **source** command to set up the DB2 environment:
 - For **cs**h, **tc**sh, and other **cs**h-compatible shells:


```
source ~DB2-instance-user/sqllib/db2cshrc
```
 - For **sh**, **k**sh, **ba**sh and other Bourne-compatible shells:


```
. ~DB2-instance-user/sqllib/db2profile
```

The DB2 ODBC driver requires that this environment be set for all operations; ClearQuest does not operate properly with DB2 if this environment is not set. A typical symptom that the environment is not set is that the DB2 ODBC driver cannot log on to the DB2 database.

3. Run the DB2 administration tool, **db2**, on the command line.
4. Create a DB2 TCP/IP Node for use by the ClearQuest Server host. The node alias must be the same for all DB2 clients. The port number is the TCP/IP port used by the DB2 service.


```
db2> CATALOG TCPIP NODE node-alias REMOTE server-host-name SERVER port-number
```
5. Create a DB2 database alias for each physical database. The database alias must be the same for all DB2 clients.


```
db2> CATALOG DATABASE database-name AS database-alias AT NODE node-alias
```
6. Test the connection to the DB2 database. The **CONNECT** command should succeed.


```
db2> CONNECT TO database-alias USER database-user-id USING password
db2> DISCONNECT CURRENT
```

- ```
db2> QUIT
```
7. For AIX only, create the `libdb2.so` file:
 

```
cd IBM DB2 Install Dir/DB2 version/lib
ar -x libdb2.a
mv shr.o libdb2.so
```
  8. For Solaris, Linux, and HP-UX platforms, if the *IBM DB2 Install Dir/DB2 version* is not `/opt/IBM/db2/V8.1`, then you must edit `cqodbc.ini`. For AIX platforms, if *IBM DB2 Install Dir/DB2 version* is not `/usr/opt/db2_08_01`, then you must edit `cqodbc.ini`. To edit `cqodbc.ini`:
 

```
cd cquest-home-dir/arch/resources
```

 Look for the section in `cqodbc.ini` that looks like this:
 

```
[cqdb2ibm]
Driver={path given above}
Description=IBM Db2 driver
```

 Change the **Driver=** line to point to the actual location of the DB2 driver. For AIX, the driver is the `libdb2.so` file created above; for other operating systems, it's the *IBM DB2 Install Dir/DB2 version/lib/libdb2.xx*, where *xx* is `so` on Solaris and Linux and `s1` on HP-UX.
  9. Repeat Step 5 on page 50 and Step 6 on page 50 for each physical database.
  10. Register the ClearQuest database on the ClearQuest Server host (see "Registering the database on the ClearQuest Server" on page 51 for **cqreg** command details). The following information is required to successfully connect:
    - Vendor: DB2
    - Server: *server host name*
    - Database: *database alias for schema repository*
    - User Name: *database-user-id*
    - Password: *password*

---

## Setting up the ASCII code page

To ensure data integrity for UNIX clients that write data to the ClearQuest database, you must set the code page to ASCII in two places:

1. On the administrator host, run **installutil** to set the schema repository code page to ASCII. For more information, see the *IBM Rational ClearQuest Administrator's Guide*.
2. Run the database management tool for your ClearQuest database and set the database code page to ASCII. For more information, see the *IBM Rational ClearQuest Administrator's Guide*.

---

## Registering the database on the ClearQuest Server

For each ClearQuest Server running on UNIX, you must create a ClearQuest database registration entry using the **cqreg** command. The **cqreg** command has the following options described in Table 8:

```
cqreg add_dbset -v -s -d -u -p -dbset [-co]
```

Table 8. *cqreg* options

| cqreg Option | Description          |
|--------------|----------------------|
| <b>-v</b>    | The database vendor. |

Table 8. *cqreg* options (continued)

| cqreg Option | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| -s           | Database server name. Use this parameter for the Oracle SID value.<br><br><b>CAUTION:</b><br><b>If using DB2 version 7.x, use this parameter to indicate the database node.</b>                                                                                                                                                                                                                                                                                               |
| -d           | For SQL Server and DB2 version 8.x, the name of the database server host.                                                                                                                                                                                                                                                                                                                                                                                                     |
| -u           | The user name for accessing the database.                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| -p           | The password for accessing the database.                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| -dbset       | The name of the connection. By default the name of the connection is the ClearQuest version (for example, 2003.06.13).                                                                                                                                                                                                                                                                                                                                                        |
| -co          | The connect options. Use this option to specify the following values for an Oracle<br>database: <b>HOST=hostname;SID=sid_name;SERVER_VER=8.1; 9.2; 10.1CLIENT_VER=8.1; 9.2; 10.1</b><br><br>If using a SQL Server database, you can specify optional values for the following: <b>PORT</b> and <b>INSTANCE</b> .<br><b>Note:</b> For more information using connect options for all supported database vendors, see <i>IBM Rational ClearQuest Documentation Supplement</i> . |

The following commands add connections for various vendor databases.

- For Oracle:

```
cqreg add_dbset -v ORACLE -s cqtest1 -d CQ1 -u cq_unix_m -p
```

```
cq_unix_m -dbset CQ_UNIX_TEST -co"LOB_TYPE=LOB"
```

- For SQL Server:

```
cqreg add_dbset -v SQLSERVER -s cqtest2 -d musitea_m -u mila -p mila
```

```
-dbset CQ_DEV -co"PORT=1459"
```

- For DB2:

```
cqreg add_dbset -v DB2 -s db2tcnode -d musitea_m -u mila -p mila
```

```
-dbset CQ_DEV
```

**Note:** For reporting capability in a multihost environment, the **dbset** names for all ClearQuest Servers running on UNIX must be identical to the connection name used on the ClearQuest Server running on Windows. If these connection names are not the identical, reports will not run correctly.

## Configuring a multihost environment

The ClearQuest Server can be deployed on a single host or across multiple hosts. One advantage of a multihost is load balancing and failover. If more than one ClearQuest Server supports the ClearQuest Web Application, the load is balanced across all the ClearQuest Servers. If one of the ClearQuest Servers goes down, all subsequent requests for the new sessions are sent to the other available servers. To configure load balancing and failover, you must modify the `jtl.properties` file on the hosts where the ClearQuest Web Application and ClearQuest Servers are installed.

**Note:** Report execution requires the installation and configuration of CEEE on either a Windows computer that runs the ClearQuest Server or a separate host. For ClearQuest Web client users to have reporting capabilities, at least one ClearQuest Server must be running on Windows in a multihost environment.

For instructions about configuring a multihost environment for ClearQuest Web Application and ClearQuest Server hosts, see the *IBM Rational New ClearQuest Web Administrator's Guide*.



---

## Chapter 8. Configuring New ClearQuest Web

This chapter explains the required configuration tasks for ClearQuest Server and ClearQuest Web Application.

---

### Prerequisites

Before proceeding, ensure that you have completed these tasks:

- Install and configure the ClearQuest vendor database (and the database client software, if applicable).
- Configure the ClearQuest schema repository and user database for use in a nonproduction environment.
- Configure connections to the database
- Install New ClearQuest Web software on the appropriate computers.
- Install a supported Web browser on client desktops.

---

### Configuring RWP

New Rational ClearQuest Web uses the Rational Web Platform (RWP) as its Web server. RWP is installed and started as part of the Windows and UNIX installations for the ClearQuest Web Application component.

Typically, there is no need to modify the RWP configuration to get New ClearQuest Web up and running. Occasionally, it may be necessary to configure RWP, for example, to avoid port conflicts with other applications. If you are aware of port conflicts, see the *IBM Rational New ClearQuest Web Administrator's Guide* for details about how to resolve this problem and for more information on the following topics:

- Where RWP is installed
- The location and names of RWP configuration files
- How to change RWP logging defaults
- How to stop and restart RWP
- How to configure access from another Web server

---

### Starting and stopping the ClearQuest Server on UNIX

The ClearQuest Server on UNIX is started at the end of an installation and on a system restart. The ClearQuest Server can also be started and stopped manually.

To start the ClearQuest Server on UNIX:

```
cquest-home-dir/cqweb/cqserver_startup
```

To stop and restart the ClearQuest Server on UNIX:

```
cquest-home-dir/cqweb/cqserver_shutdown
```

```
cquest-home-dir/cqweb/cqserver_restart
```

For information on starting and stopping ClearQuest Server running on Windows, see the *IBM Rational New ClearQuest Web Administrator's Guide*

---

## Verifying the ClearQuest Web configuration

After running the ClearQuest Maintenance Tool on a ClearQuest Server host running on Windows or the **cqreg** command on a ClearQuest Server running on UNIX to create database connections, verify that ClearQuest Web is operational.

1. From any Windows or UNIX client, start a supported Web browser.
2. Enter this Web address: `http://host/cqweb/login` or `http://host:81/cqweb/login` when the ClearQuest Web Application host is running on AIX and HP-UX. where *host* is the name of the ClearQuest Web Application server machine.

**Note:** The ClearQuest Server refreshes its internal list of database connections every 10 minutes. You can either wait for the refresh or restart the ClearQuest Request Manager.

3. If ClearQuest Web Logon page does not appear in your browser, check the network connectivity of the client host to the ClearQuest Web Application server host with a **ping** command. If the client host has connectivity to the ClearQuest Web Application server, verify that the ClearQuest Web services are running on that host. For more information about how to start all the ClearQuest Web services, see the *IBM Rational New ClearQuest Web Administrator's Guide*.
4. Type a **User Name** and **Password** and select a Schema Repository. Click **OK**. The ClearQuest Web interface opens in your browser.
5. Select a ClearQuest database from the schema repository and begin to use New ClearQuest Web.

---

## Administration tasks

After New ClearQuest Web is up and running, the ClearQuest Administrator can perform any of the following tasks:

- Enabling e-mail notification for New ClearQuest Web users
- Specifying session timeout
- Configuring an additional ClearQuest Server
- Restricting access to New ClearQuest Web
- Configuring reporting for the location of the CEEE
- Specifying a report format
- Starting and stopping ClearQuest Web Application server

New ClearQuest Web provides a Site Configuration utility to assist in performing these tasks. For information, see the *IBM Rational New ClearQuest Web Administrator's Guide*.

---

## Logging in to New ClearQuest Web

To log in to New ClearQuest Web for the first time:

1. Ask your administrator for the ClearQuest URL, database name, and the username and password that you should use.
2. Start your Web browser, and then type the following URL:  
`http://<host>/<alias>`  
where:
  - *<host>* is the host name of the ClearQuest Web Application server, and
  - *<alias>* is the directory containing the New ClearQuest Web files.

3. Press return.
4. In the New ClearQuest Web Logon page:
  - a. At **User Name**, **Password**, and **Database**, enter the information that your administrator gave you.
  - b. Click **Logon**.

---

## Performance and recommended configurations

IBM has performed performance and stability testing for various Web server configurations. Server sizing to meet specific performance needs is highly dependent on the database schema, patterns of use, Web server configuration, database configuration, and network configuration. IBM does not provide specific recommendations about how much and what type of hardware is needed to handle a specific load or meet certain performance criteria. You should start with the minimum hardware recommended hardware recommended in Table 2 and run performance tests to determine how many concurrent users can be supported at the desired transaction response times and transaction quantities. When you determine the number of concurrent users per server, you can calculate how many servers are needed to meet your anticipated peak load.

For example, one site ran performance tests with a hardware configuration that can handle up to 50 concurrent users with a response time of 20 seconds. Another site with the same configuration can run the same tests and decide to maintain a response time of 6 seconds or less. To support the performance for 50 concurrent users, this site must purchase two servers instead of one. For that reason, IBM recommends that you run performance tests to determine how many concurrent users can be supported at the level of performance desired.

The known actions that improve performance include using a separate server for the database and minimizing other tasks running on a New ClearQuest Web server. CPU speed is a also critical factor in the scalability of New ClearQuest Web. Testing indicates that performance more than doubles when you use a host with a 2 GHz processor compared to a machine with 1 GHz processor. The script-intensive nature of many schema repositories is the main factor in performance differences for New ClearQuest Web.



---

## Chapter 9. Upgrading from a previous release

This chapter describes how to upgrade to New Rational ClearQuest Web from a previous installation of ClearQuest Web or New ClearQuest Web version 2003.06.00.

To upgrade from version 2003.06.00 or earlier of ClearQuest Web:

1. If the ClearQuest Web host from the previous release is to be used as a host for one of the New Rational ClearQuest Web components running on Windows, uninstall ClearQuest on the host.

**Note:** You must completely remove ClearQuest from the host. To do so: click **Start > Settings > Control Panel > Add or Remove Programs**. Select the ClearQuest product and click **Remove** then click **Install**.

2. Click **Start > Programs > Settings > Control Panel > Administrative Tools > Services**. In the Services dialog box, select **World Wide Web Publishing Service** and right-click **Properties** to disable the service.
3. Click **Apply**.
4. Install some or all of the New ClearQuest Web components on the Windows host.
5. Perform the postinstallation tasks, as described in Chapter 6 for Windows and Chapter 7.

**Note:** The database connection information maintained by the ClearQuest administrator may also need to be upgraded. For more information on upgrading the connection information for ClearQuest Server accessing the ClearQuest database from Windows or UNIX, see the "Upgrading ClearQuest" section in the IBM Rational Suite Upgrade Guide for version 2003.06.13 or the "Upgrading ClearQuest" chapter in the IBM Rational ClearQuest Product Family Installation Guide for release clearquest\_p2003.06.00-6.

To upgrade from New ClearQuest Web version 2003.06.00:

1. If any host for the ClearQuest Server or ClearQuest Web Application server on Windows or UNIX from New ClearQuest Web version 2003.06.00 the is to be used as a host for one of the New Rational ClearQuest Web components for version 2003.06.13, uninstall the New ClearQuest Web component on the host.

**Note:** If changes were made to the rwp.conf file for New ClearQuest Web version 2003.06.00, backup this file before uninstalling. After installing New ClearQuest Web version 2003.06.13, use the customization in the backup of rwp.conf to modify the new rwp.conf that will be installed.

2. To uninstall New ClearQuest Web components on Windows, click **Start > Settings > Control Panel > Add or Remove Programs**. Select the ClearQuest product and click **Remove** then click **Install**.
3. To uninstall New ClearQuest Web components on UNIX, "The deinstallation model" on page 34.
4. Install New ClearQuest Web components on the host.
5. Perform the postinstallation tasks, as described in Chapter 6 and Chapter 7, "Postinstallation tasks on UNIX," on page 47.

**Note:** The database connection information maintained by the ClearQuest administrator may also need to be upgraded. For more information on upgrading the connection information for ClearQuest Server accessing the ClearQuest database from Windows or UNIX, see the "Upgrading ClearQuest" section in the *IBM Rational Suite Upgrade Guide* for version 2003.06.13 or the "Upgrading ClearQuest" chapter in the *IBM Rational ClearQuest Product Family Installation Guide* for release clearquest\_p2003.06.00-6.

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