

Installation Guide

Defect Manager Release 4.6

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About the Installation Guide

This guide provides a detailed explanation of how to install windows and web-based components of defect manager including installation considerations for different options and configurations.

This chapter will help guide you through the installation process. To install Tiera Software Defect Manager you need to follow the general steps below:

1. Review the [System Requirements](#)
2. Review Defect Manager [System Installation Approaches](#)
3. [Install Defect Manager](#)
4. [Configure a Data Source Name \(DSN\) to use the Defect Manager](#)
5. [Upgrade the existing Defect Manager System \(for existing users only\)](#)
6. Use [Defect Manager Administrator](#) to configure the system

If you are installing the demo, you do not need to perform steps 4-6 to start using the system. A default configuration is already set up in the database that is supplied as part of the product demo that does not need to be upgraded or configured.

An [Installation Checklist](#) section is provided as a convenient summary outline and guide to the installation and deployment processes for Defect Manager and its major components:

- *Defect Manager for Windows*
- *Defect Manager for Web*
- *E-Tech Support*
- *Defect Manager Repository Database*

Other Defect Manager Guides

The Installation Guide has the following companion guides that provide additional detail on specific topics for Defect Manager:

- Getting Started Guide
- User Guide – Defect Manager for Windows
- User Guide – Defect Manager for Web
- User Guide – E-Tech Support
- Administration Guide
- Programmer API Guide
- Glossary

System Requirements

Before installing Defect Manager it is important that you have met the following prerequisites:

- At least 100 MB of disk space available for Defect Manager software.
- Windows 2000, Windows XP, Windows Server 2003, Windows ME 98/95

If you are planning on using the Microsoft Visual Source Safe integration, you will need:

- Microsoft Visual Source Safe 6.0

If you are planning on using the web interface capabilities of the product you will need the following:

- Web Server: Microsoft IIS 5.0 or IIS 6.0
- Web Browser: Microsoft Internet Explorer (IE) 5.5 or greater, Mozilla Firefox, others.

The Defect Manager Repository supports the following database management systems: Microsoft Access, Microsoft SQL Server, and Oracle databases.

Defect Manager for Windows workstation (Complete Install/User)

- Windows 98/ME/2000/XP
- Hard disk with at least 50 MB available for Defect Manager
- Multi-user configurations, require network access to shared repository database

Defect Manager for Windows server install (Network Install/User)

- Windows 2000/XP/2003 desktop
- Hard disk with at least 10 MB available for Defect Manager
- Network access for shared repository database and application programs

Defect Manger for Web and E-Tech Support (Web Server Install)

- Windows 2000/2003/XP server
- Hard disk with at least 50 MB available for Defect Manager
- IIS 5.0 or greater
- Network access for internet/extranet and shared repository database
- Workstations with Browser: Microsoft IE 5.5 or greater.

Databases

• Access 97, 2000, 2002
• SQL Server 6.x, 7.x and 2000, 2005
• Oracle 8i, 9i, 10i,11i

Installed Directory Structure

After you run the **setup.exe** program, there will be several sub-folders installed under the folder where you chose to install the Defect Manager.

The sub-folders are described below.

- **\Attachments** – This is the default folder where defect attachments are stored. For every defect that has an attachment, there will be a sub-folder under Attachments. By using the Defect Manager Administrator, you can change this location.
- **\Bin** – This folder holds the product executables for Defect Manager for Windows. It also contains the online help files.
- **\Manuals** – The documentation suitable for printing is placed here.
- **\Network Install** – The network installer (setup.exe) program is located in this folder. Just run the **setup.exe** program from this directory on another user's machine in your network and it will install defect manager on the user's machine.
- **\Reminders** – This is the folder where reminder notifications should be placed. The sub-directory Log keeps a detail execution log every time the **reminders.exe** program runs.
- **\Reports** – This is the folder where reports for the system are placed. Under this directory there are sub-directories for each supported report engine. The **\XML** sub-directory contains the predefined XSLT reports.
- **\Schema** – This folder contains repository initialization SQL scripts.
- **\Scripts** – This is the folder that contains initialization scripts that establish default codes in the repository when they are run.
- **\Upgrade** – The folder where the **update.exe** program execution logs are placed.
- **\POP3Server** – The folder where the POP3Server logs are stored.
- **\MailManagerServer** – The folder where the Mail Manager Server logs are stored.
- **\Web** – All the web-based capabilities for Defect Manager are located in this directory. The first sub-directory is **\defectmgr**, which is the root directory for Active Server Page version of Defect Manager for Web. The second sub-directory is **\defectmgr.net**, which is the root directory for Active Server Page .net version of Defect Manager for Web. The third sub-directory, **\ETechSupport**, is the root directory for E-Tech Support system.

System Installation Approaches

Defect Manager is now available in two different versions and you will have to decide whether you will be installing *Defect Manager for Windows*, *Defect Manager for Web* or both versions. Since there are several possible ways to install Defect Manager, this section will describe the different approaches you may select or use in combination.

Defect Manager for Windows is designed to run as a “*Client*” program in a client/server environment. As a client program, Defect Manager executes on each user’s workstation and access a shared repository database. Access to the repository database from client programs on each workstation is done over the network using ODBC and TCP/IP communications protocols. An ODBC Data source Name (DNS) object is used, on the workstation, to establish communications to the repository database.

Defect Manager for Web is designed to run as a “*Thin Client*” using a web-browser on the workstation communicating with the web-based Defect Manager application on a web server platform. Defect Manager is designed to work with web browsers such as Microsoft Internet Explorer and Mozilla Firefox. Access to the repository database using web applications occurs between the web-server and the database server so an ODBC DSN is not needed on a user workstations in this situation.

Also, it is possible for the web-server and the database-server to both reside on the same computer platform.

E-Tech Support is a web-based application that allows external clients and third-parties restricted access to the repository database. This web application also operates as a “*Thin Client*” using the same principles, described above, as Defect Manager for Web.

Evaluating Defect Manager with the Demo

If you downloaded the demo and are doing a product evaluation for a single user, you do not need to perform a network install.

When you install the executable components of the *Defect Manager for Windows* demonstration on your workstation, the ODBC Data Source Definition (DSN) is automatically configured to reference the demo repository using Microsoft Access.

If you prefer to evaluate Defect Manager for Windows on a server platform to support several users, refer to the next section: **Installing Defect Manager for Windows**.

If you wish to install the *Defect Manager for Web* and/or *E-Tech Support* demonstration on your web-server platform, follow the directions in sections: **Installing Defect Manager for Web**.

Installing Defect Manager for Windows

If you are going to use the *Defect Manager for Windows* version, the best way to deploy the product is to install it on a server platform. In this configuration, all the users will share the same copy of the system’s executable files located on the server platform via the Local Area Network (LAN). Each workstation will need shortcuts to launch programs installed on the server from the workstation’s desktop.

Each workstation will need to have an ODBC Data Source Name (DSN) set up to allow access to the shared repository database where it is located on the network or a single FILE DSN located on the server that all users can share.

If your company has users in various physical locations that are not on the same LAN, then:

- Each user workstation will need to install the Defect Manager product on their machine

or

- Install the Defect Manager product on a separate server platform on each LAN. Each workstation will need a desktop shortcut configured to launch the programs on the server platform. Workstations must have their shortcuts to system programs on the server linked to the proper server for their LAN.

To install Defect Manager, you run **setup.exe** from the directory where the Defect Manager files are located.

If you have the CD-ROM for Defect Manager, the **setup.exe** program is located in the root directory of the CD-ROM.

If you downloaded Defect Manager from the web, you will need to first: unzip the Defect Manager file that you downloaded. After the Defect Manager file is unzipped, you can run the **setup.exe** program from the expanded (i.e., unzipped) directory.

The **Setup Wizard** will walk you through the remaining parts of the install. Once you have completed the install, you will be ready to configure the data source for the system on each user's workstation.

You will notice that running the **setup.exe** program has created shortcuts to the *Defect Manager Log* and the *Defect Manager Admin* programs. You will need these shortcuts to launch server-based programs that execute on the workstation.

When installing Defect Manager on a server in a shared folder, you can use Windows Explorer to run the network **setup.exe** program for Defect Manager on each users machine. The Defect Manager network install is located at: **<your network install location>\Network Install\ setup.exe**. This will deploy Defect Manager for Windows on this workstation creating the shortcuts that launch Defect Manager from the LAN server.

Repeat this process on each Defect Manager user's machine.

Installing Defect Manager for Web

The “Thin Client” approach for web applications uses a browser on the workstation. The workstation does not need an ODBC a Data Source Names (DSN) specified, since the web-application on the web server communicates with the repository database. The web server needs an ODBC FILE DSN defined to locate the repository.

Likewise, the browser program is typically installed on the hard drive in the workstation so it may not need a shortcut for it on the workstation desktop.

Even if you are only using the web-based applications for Defect Manager, certain workstations, such as your system administrator’s, will very likely need access to:

- “Client” programs such as the Defect Manager Admin and possibly others to administer the system and perform a few functions that are not provided in the web version.
- The repository database from “Client” programs executing on the workstation – they require an ODBC Data Source Name (DSN or FILE DSN) to be defined on the workstation.

You can configure specific workstations to work in “Client” mode by providing them with appropriately configured shortcuts and an ODBC DSN.

Using Both Defect Manager for Windows and for Web

If you are going to use Defect Manager for Web and the Defect Manager for Windows versions of the product, then you might consider installing the Defect Manager product on your web-server platform to serve both “*Thin Client*” and “*Client*” needs.

With this approach, your users can run the web version and the Windows version from a single-web-server installation of Defect Manager.

If you are using a third-party *Internet Service Provider (ISP)* or the installation of *Defect Manager for Windows* is not feasible on your web-server platform, you can install Defect Manager twice:

- Install it on a network (LAN) server to support *Defect Manager for Windows*
- Install it on your Web Server to support *Defect Manager for Web* and *E-Tech Support*.

Both of these installations should be configured to access the same repository database.

Using E-Tech Support

The installation process for the web-based application, E-Tech Support, is identical to the process for Defect Manager for Web. Specific users gain permission to logon to this system when the administrator creates and provides them user names and passwords.

Establishing the Repository Database

A repository is a database of information about issue-defect items and your configuration of options and coded values. By default, Defect Manager will use a Microsoft Access database as its repository.

However, the system administrator can select other database systems as the database engine for the repository. Defect manager also supports: Microsoft SQL Server, Oracle, IBM DB2, Sybase, Ingres, and Postgres.

:

The *Tiera Software Defect Manager* is a very flexible system. You can use it to manage one or many different repositories.

Using A Single Repository

Typically, the system will be installed and configured to use one shared repository so that all issues and defects for all products are managed in one place – accessible by all users.

Defect Manager for Windows, is a “Client” application that executes on the workstation. It will need an ODBC **USER** or **SYSTEM ODBC Data Source Name (DSN)** created on each workstation in order to communicate with the shared repository database where-ever it is located on the network. It is also possible to use a single shared **FILE ODBC DSN** for all workstations when the *Defect Manager Log* program or the *Defect Manager Admin* program is installed on a network server. See section: [Using a FILE DSN](#).

Defect Manager for Web, is a web- based application that executes on the web server. It will need an ODBC **FILE Data Source Name (DSN)** on the web-server to communicate with the shared repository database where-ever it is located on the network.

The section, [Configuring the Repository Data Source Name \(DSN\)](#), describes how to establish the proper DSNs for your organization.

Using Multiple Repositories

Multiple Defect Manager repositories might be desirable for organizations that want to track and manage issues separately for:

- Different Product Lines or Projects
- Different Departments or Organizations within their Company
- Defined Date Intervals (e.g., retain prior years’ repositories and start a new repository for the current year)

For example, a company’s products department may use one repository to track product defects and enhancement requests while its IT department may use another repository with Defect Manager to track company hardware and software trouble reports.

Should your organization need multiple repositories, you can create them with Defect Manager, but you must provide for them in the installation and administration of the system.

Defect Manager for Windows, is a “Client” application. It will require an ODBC DSN defined for each database that will be accessed from the workstation. Defect Manager is expecting a specific DSN name (e.g., “**defectmgrwe**” for Access databases and “**defectmgr**” for other types of databases) to locate the repository database. You may use the following techniques to configure for your particular situation:

- Use an **ODBC SYSTEM DSN**, if each user and workstation will be using the same repository with Defect Manager. This allows the same DSN name to link to the same repository.
- Use an **ODBC USER DSN**, if each user logging onto a workstation needs to reference a different repository database. This allows the same DSN name to link to the appropriate repository for each user as he logs into the workstation and then runs a Defect Manager client program.
- Use an **ODBC FILE DSN (recommended)**, program command line parameters can specify the ODBC DSN to selectively use multiple repositories. See the section: [Using a FILE DSN](#) for additional information.

Defect Manager for Web is a web-based application. It is installed as a website on a web-server that uses an **ODBC FILE DSN** to connect with the appropriate Repository database.

When you use multiple repositories, you must create a separate Defect Manager website instance (i.e., set of web pages) for each repository. In essence, you are establishing a separate Defect Manager website application with its own repository – multiple times.

Each of these web-applications can be separately published to the web-server and have their own initialization file, **DefectManager.ini**. For web-installation information see section: [Installing Defect Manager for Web](#).

Configuring Repository ODBC Connections

Open Data Base Connectivity (ODBC) is an industry standard established by Microsoft that is the primary way multiple workstations and computer systems are able to communicate by establishing connections with databases over a network.

An ODBC Data Source Name (DSN) is an object that stores the network-connection information needed to send SQL commands and return database information.

ODBC DSN connections are configured using the ODBC Data Source (32 bit) tool found on the Control Panel window of a Microsoft Windows ME/98/95 or NT 4.0 operating system by navigating:

Start→Settings→Control Panel→ODBC Data Source (32bit)

Alternatively, using Windows 2000/XP, you navigate by entering:

Start→Control Panel→Administrative Tools→Data Sources (ODBC).

This will produce the ODBC DSN administration window shown below.

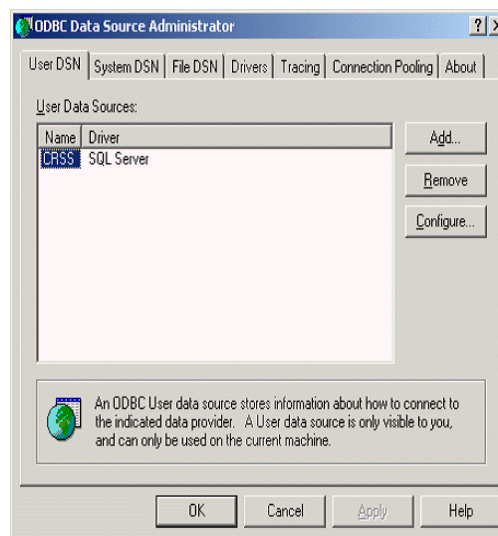


Figure: ODBC Data Source (32bit) Configuration Form

There are three types of ODBC DSN connections that you can configure using the ODBC Data Source (32-bit) tool using the first three tabs on the form shown above.

- **USER ODBC DSN** – This DSN is only available to the user that defined it on this workstation when this user is logged on to this workstation.
- **SYSTEM ODBC DSN** – All users that log on to this workstation where this DSN was defined will have access to it.
- **FILE ODBC DSN** – Globally, multiple users can share access to this DSN from multiple workstations and computer systems, if they have the same database driver.

Using a FILE DSN

The **Defect Manager Log** application program and the **Defect Manager Admin** program requires there to be an ODBC DSN named **defectmgrwe** for Microsoft Access databases or **defectmgr** for the other types of databases used as the repository.

To deploy the **Defect Manager for Windows** system you need to

- (1) Create a **USER ODBC DSN** on each user on each PC-workstation,

or

- (2) Create a **SYSTEM ODBC DSN** on each PC-workstation,

or

- (3) Create a single **FILE DSN** that can be shared by multiple users/workstations.

When you create a FILE DSN with the ODBC Administrator window, it generates a file with the name of:

<data-source name>.dsn.

This file encapsulates all the information that is required to use the FILE DSN and connect with the repository database.

In order for the **Defect Manager Log** program or the **Defect Manager Admin** program to use the FILE DSN, you will need to specify this file name (i.e., a fully-qualified pathname) as the first command line parameter when the program is launched or place the FILE DSN in the installation \bin directory. You can embed command-line parameters in a program-run statement within a shortcut to make it easy for users to launch their Defect Manager programs.

If you have installed the product in a shared network directory, you can place the FILE DSN in the \bin directory and all users can share the use of the FILE DSN.

Using command-line parameters can be useful, when you are using multiple repositories. For instance, if you have two repositories, one that tracks defects for your product division and one that tracks bugs for your IT group, you could set up two different shortcuts. Each shortcut would be identical and use the same path to the executable name (... \bin \log.exe), except that the first parameter after the executable name would be different, and would specify the path of the appropriate FILE DSN that points to the appropriate repository.

Remember, command-line parameters are specified as the first parameter after the executable program name. If you are unfamiliar with specifying command line parameters, you should review the appropriate windows documentation, or e-mail us at support@tierasoft.com.

To summarize, Defect Manager looks for its repository database as an ODBC data source in the following sequence.

- (1) As a **ODBC FILE DSN** as the first parameter on the command line
- (2) As a **ODBC FILE DSN** in the \bin directory where Defect Manager is installed
- (3) As an **ODBC USER OR SYSTEM DSN** on the workstation called **defectmgr** (for SQL Server, Oracle, IBM DB2, Ingres or Postgres databases) or **defectmgrwe** (for the MS Access database)

The following sections describes how to configure a DSN on a workstation or server for three of the types of databases that may be used to establish a Defect Manager Repository: Microsoft Access, Oracle and SQL Server.

The other types database management system supported by Defect Manager (i.e., IBM DB2, Sybase, Ingres, Postgres) are not illustrated since they are configured in similar way using ODBC selections and drivers appropriate to each of these database systems.

Configuring the ODBC Data Source for Microsoft Access

If you are using the demo version of the product, you will not need to perform this step; the ODBC data source is configured for you.

To use the *Defect Manager for Windows* system, you can set up a **USER ODBC DSN** using the ODBC Administrator window from each user's workstation.

To use the **Defect Manager for Web** system, you must set up a **FILE ODBC DSN** using the ODBC Administrator window on the web server for Defect Manager.

The screen below: shows the *ODBC DSN Administrator form* with tabs for User, System and File DSN definition.

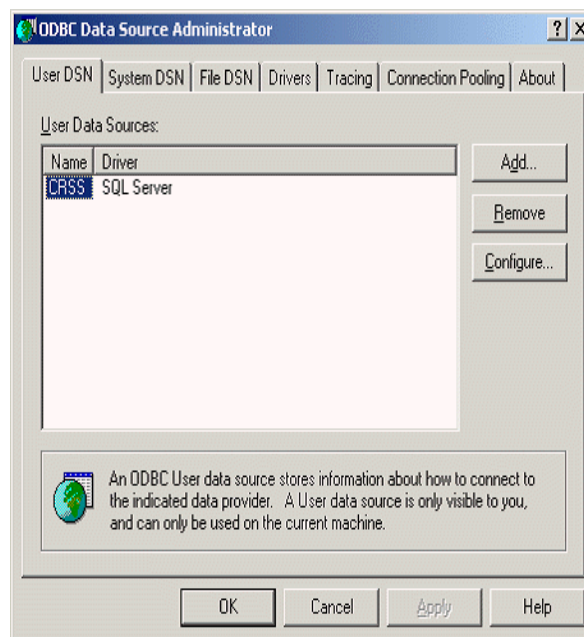


Figure: Starting to Setup an ODBC Data Source

You now need to push the **Add** Button. You will then be presented with the next screen that allows you to create a new DSN:

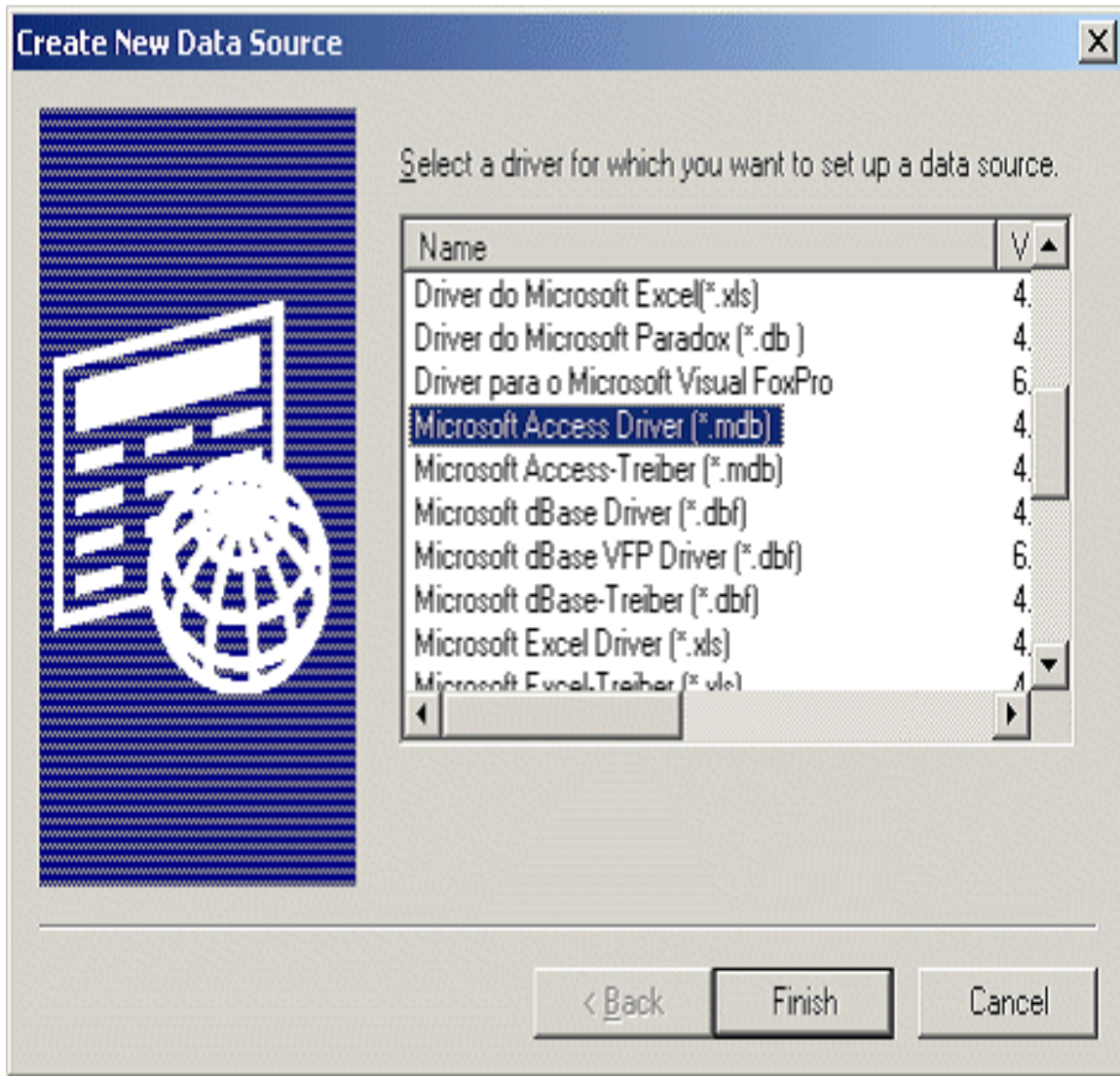


Figure: Selecting the ODBC Data Source Driver

You need to tab down to **Microsoft Access Driver (*.mdb)** item in the list box and then select the **Finish** button.

After getting this screen you will need to enter **defectmgrwe** (i.e., the DSN-name Defect Manager expects when Ms Access is used) into the **Data Source Name** field.

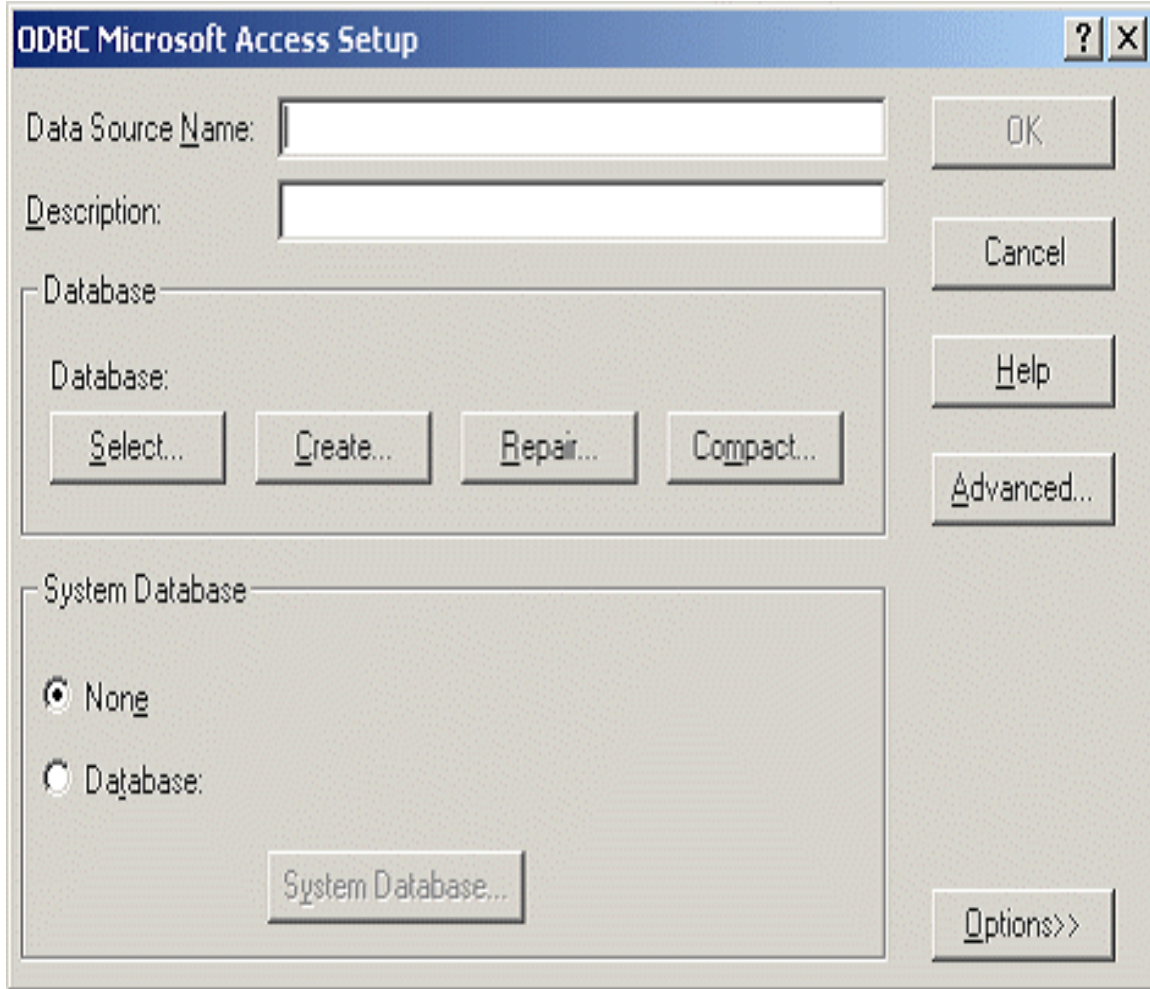


Figure: Naming the ODBC Data Source

You then need to press the *Select* button and you will see the directory list dialog as shown below:

You must find the Access database file called **defects.mdb** that is located in the directory where you installed the Defect Manager system.

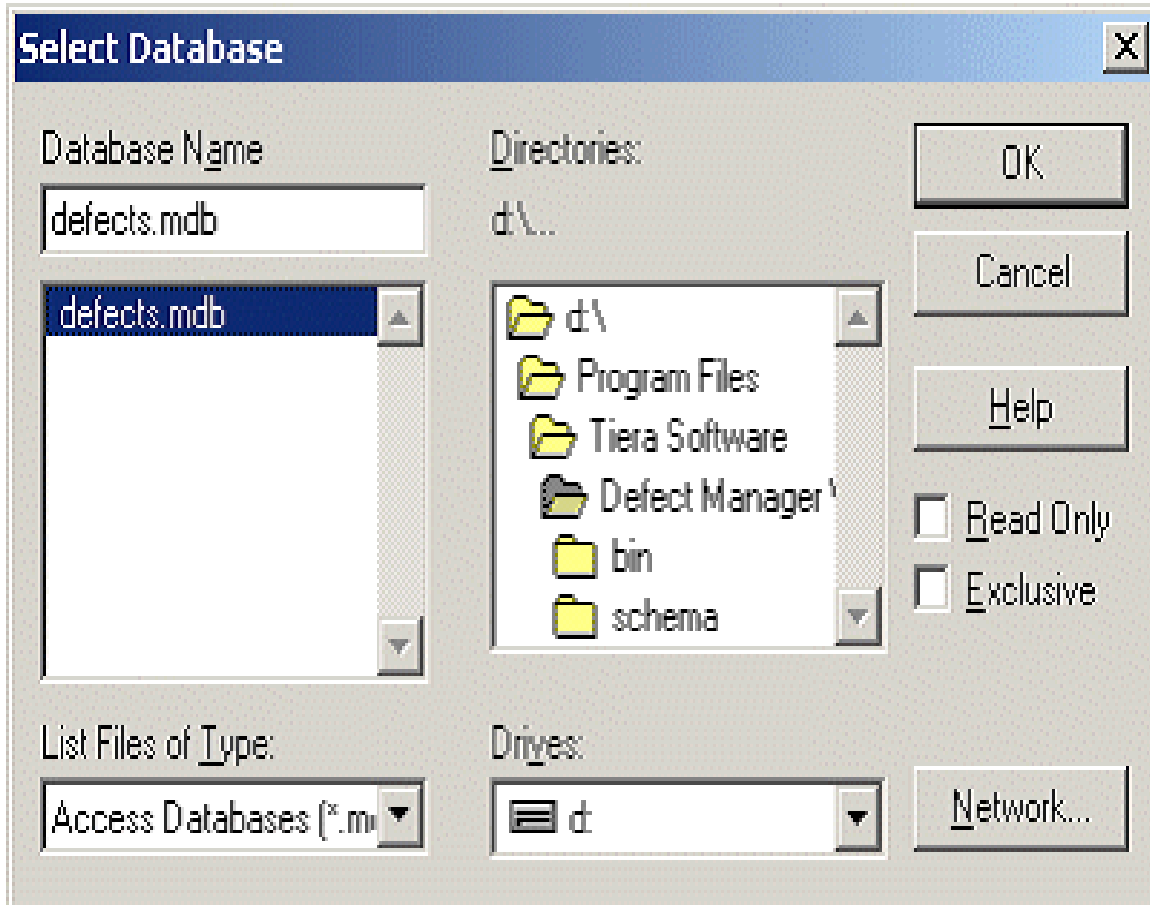


Figure: Linking to your Database as an ODBC Data Source

Once you have selected this file click the **OK** button. You will then return to the Microsoft Access Data Sources Dialog as shown below:

The completed DSN definition is shown in the above window with the name, **defectmgrwe**, that Defect Manager expects to find when a Microsoft Access database is used.

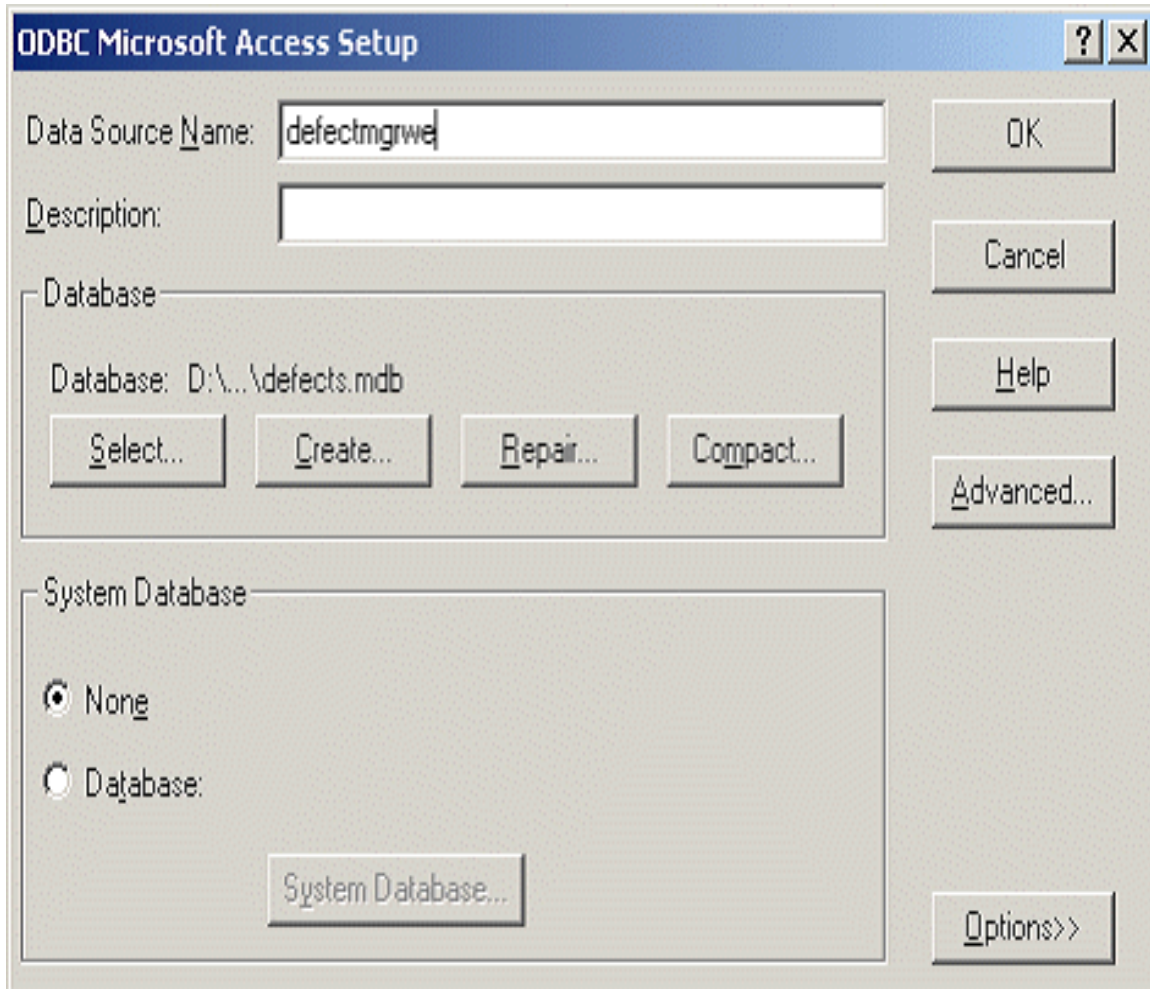


Figure: Completing the Database Setup for an ODBC Data Source

Once again click the **OK** button.

You will then be returned back to the ODBC Data Sources Dialog as shown below:

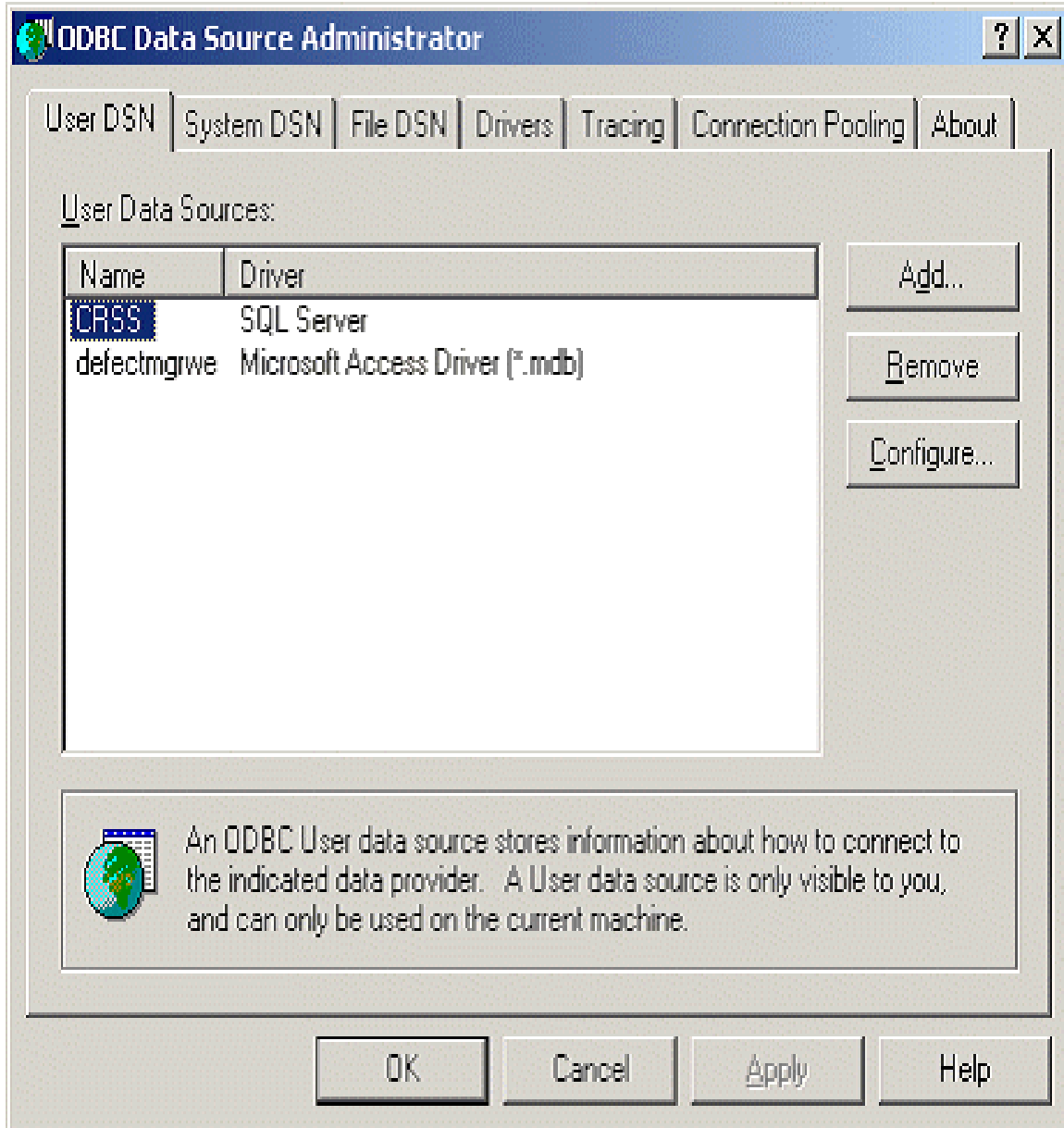


Figure: Final Step in Creating your ODBC Data Source

You can now click the **OK** button.

If you have installed the demo system, you can now use the **Defect Log** program to start logging defects. Otherwise, you can proceed with the installation and administration steps required to create or upgrade the repository and configure the system.

Configuring the ODBC Data Source for Oracle

To use Oracle as the Defect Manager Repository database, you will need to establish an ODBC Data Source Name (DSN) so that workstations and servers can communicate with the Oracle-based repository over the network.

Before you can configure the DSN, you must create an initial Oracle user-id of **defectmgr** and password of **defectmgrpw**. You will use this user-id when configuring this data source.

ODBC DSN connections are configured using the ODBC Data Source (32 bit) tool found on the Control Panel window of a Microsoft Windows ME/98/95 or NT 4.0 operating system by navigating:

Start→Settings→Control Panel→ODBC Data Source (32bit)

Alternatively, using Windows 2000/XP, you navigate by entering:

Start→Control Panel→Administrative Tools→Data Sources (ODBC).

This will produce the ODBC DSN administration window shown below.

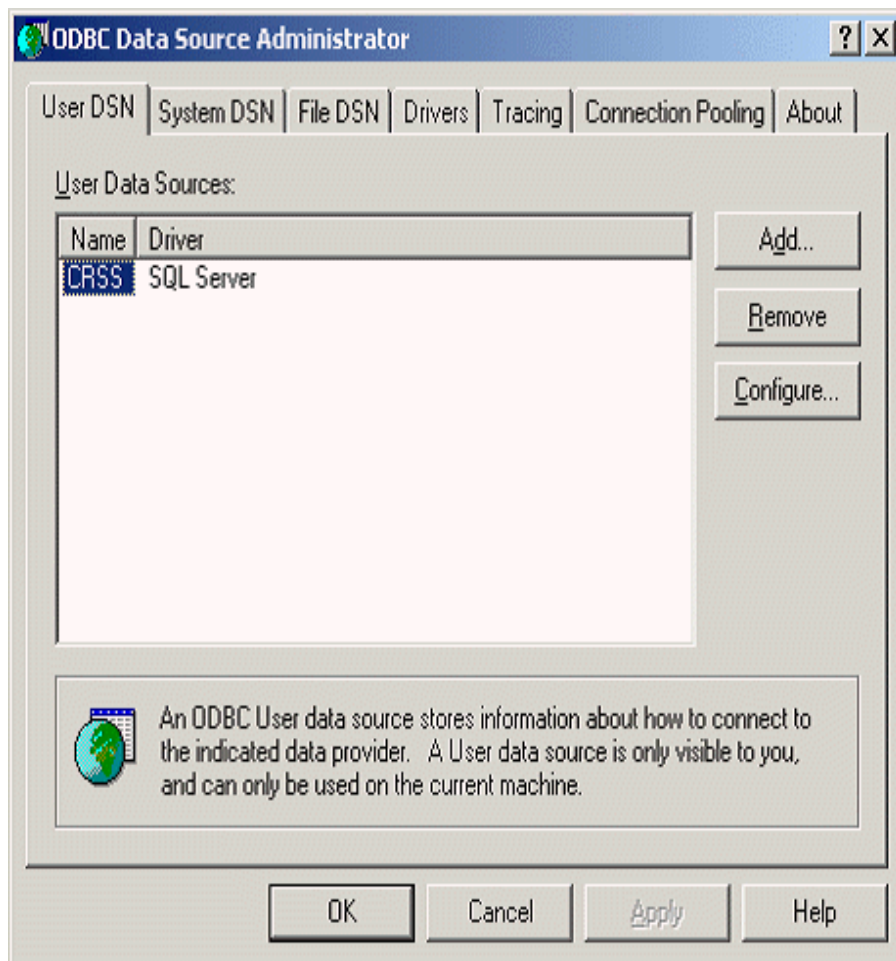


Figure: Starting to Setup an Oracle ODBC Data Source

You now need to push the **Add** Button. You will then be presented with the next screen:

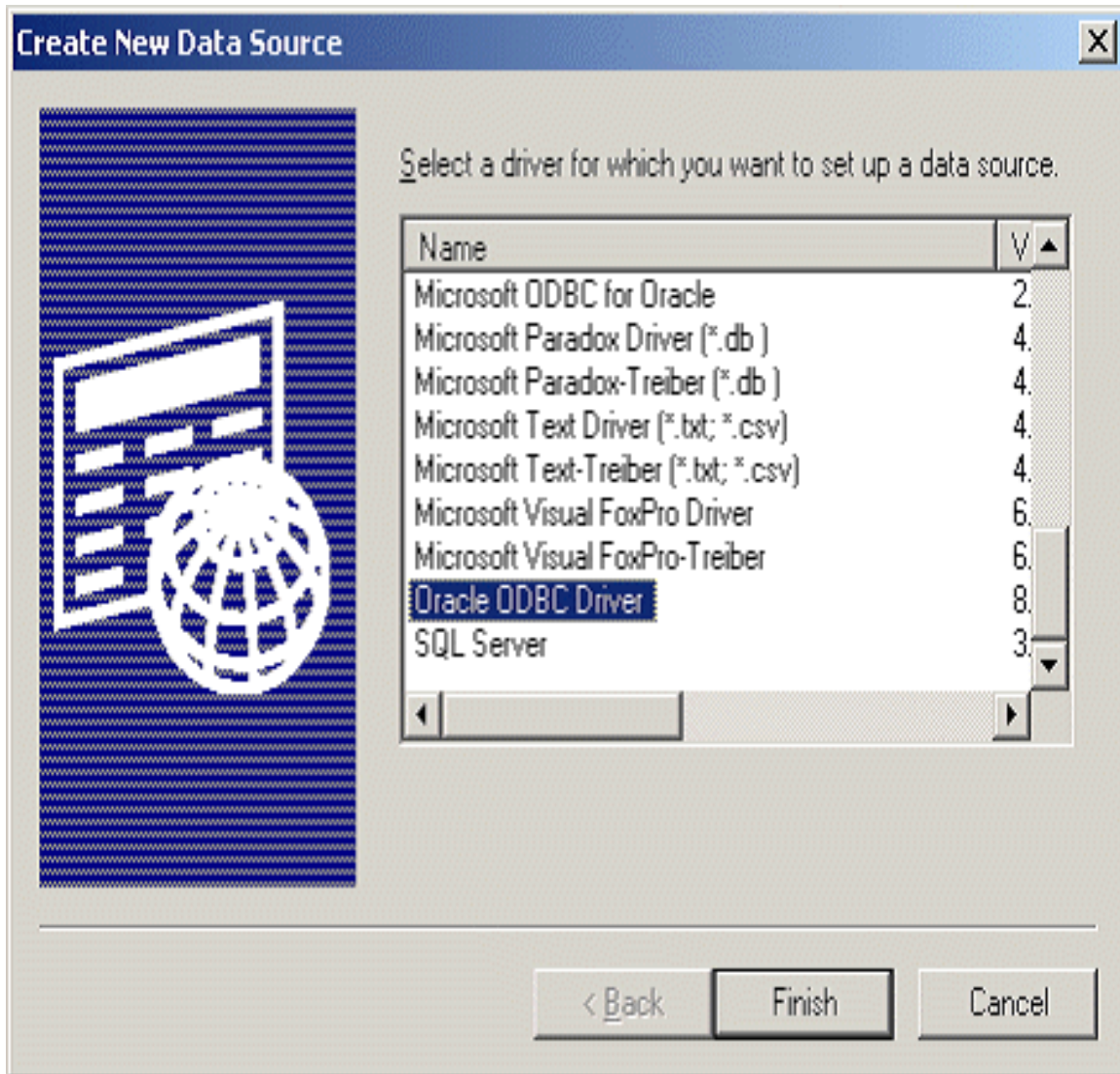


Figure: Selecting the Oracle ODBC Data Source Driver

You need to tab down to **Oracle Driver** item in the list box and then select the **Finish** button.

Note: Alternatively, you can use the Microsoft ODBC Oracle Driver

You will then see the following screen:

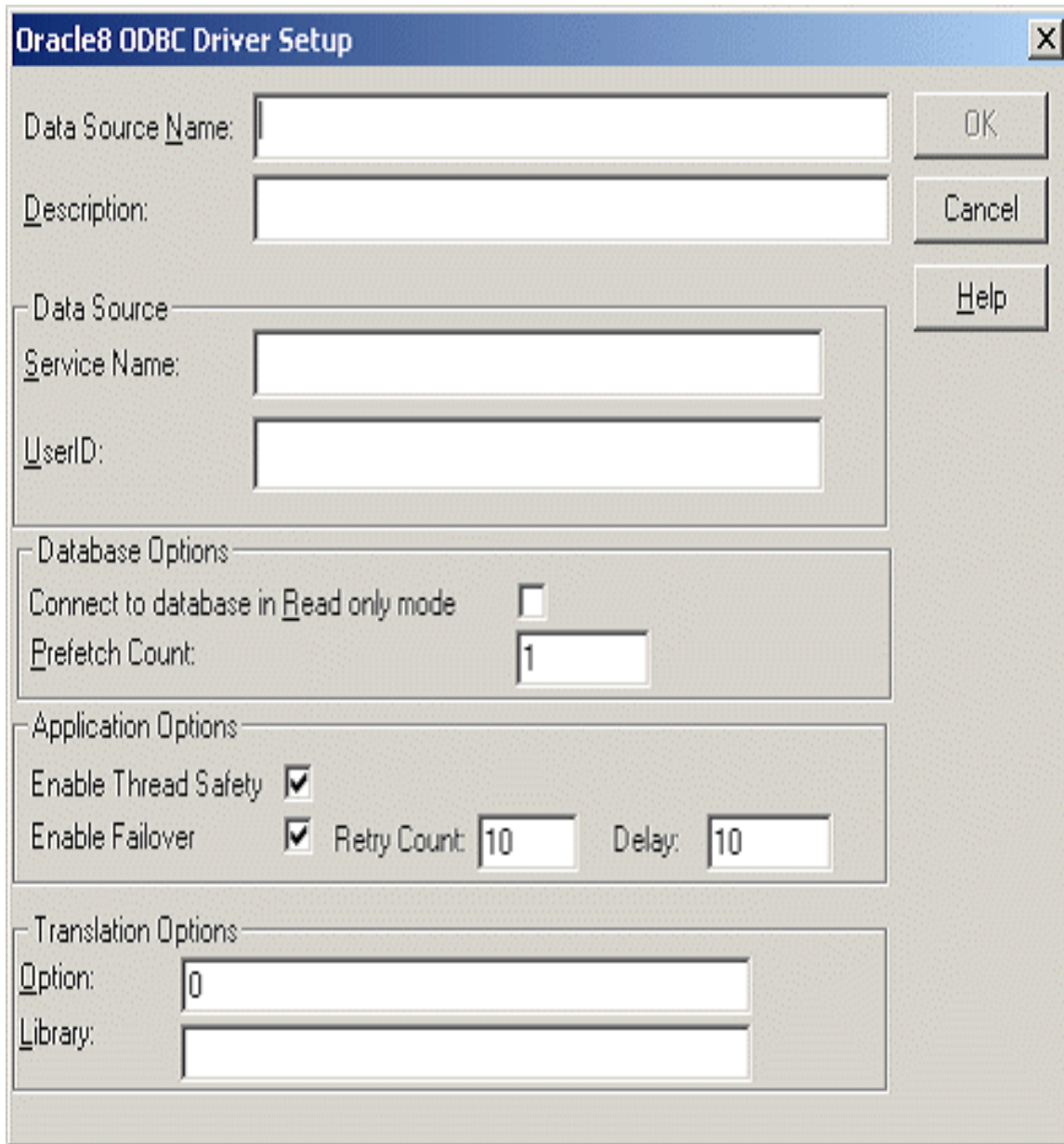


Figure: Naming an Oracle ODBC Data Source

You need to enter **defectmgr** into the **Data Source Name** field. You will need to talk to your database administrator about filling in the other fields.

Once again click the **OK** button.

You will then be returned back to the ODBC Data Sources Dialog as shown below:

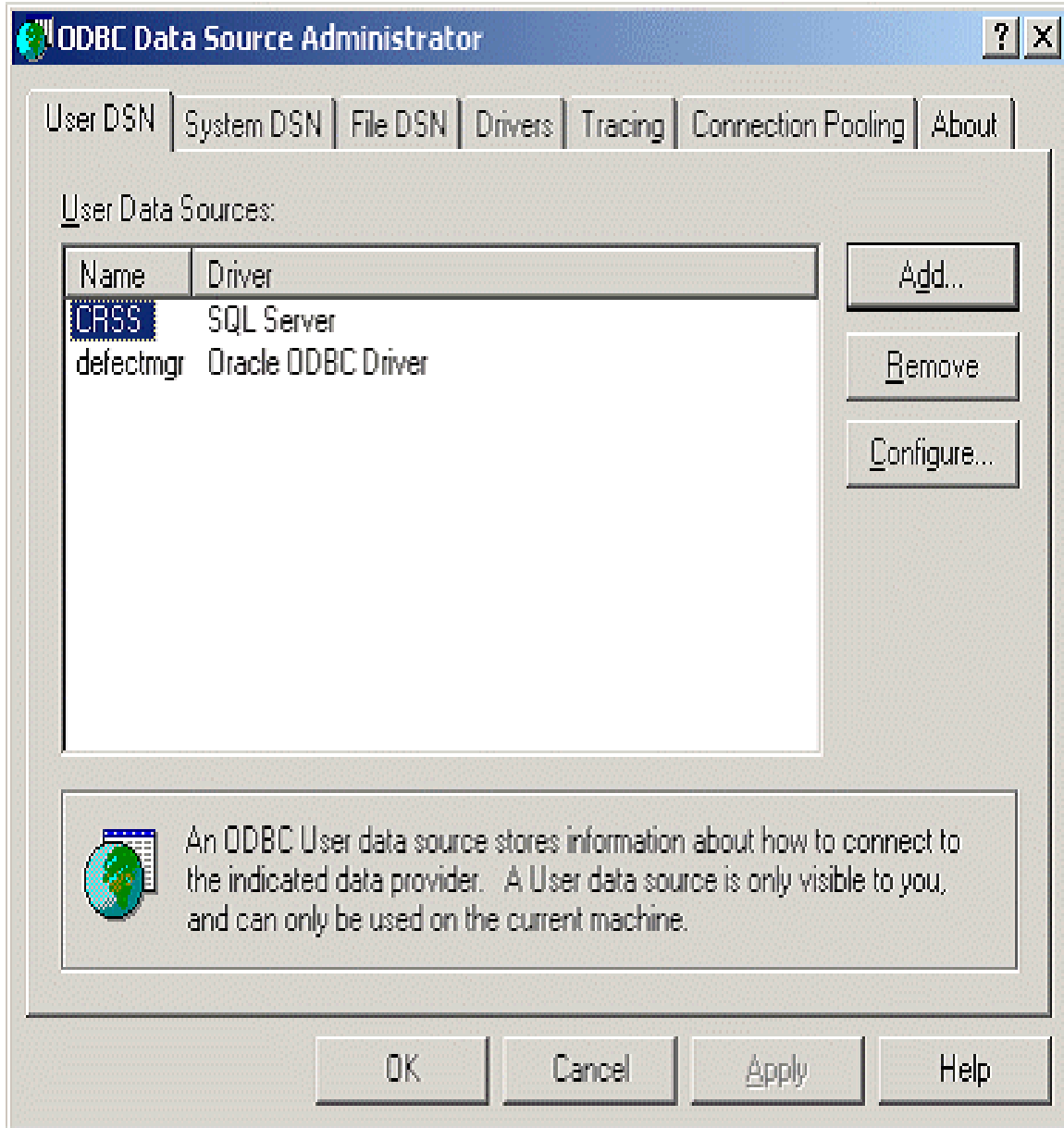


Figure: Completing an Oracle ODBC Data Source

You can now click the OK button.

Configuring the ODBC Data Source for SQL Server

To use Microsoft SQL Server as the Defect Manager Repository database, you will need to establish an ODBC Data Source Name (DSN) so that workstations and servers can communicate with the SQL Server-based repository over the network

Before you configure the data source you must create a Microsoft SQL Server user-id of **defectmgr**. You will use this user-id when configuring this data source.

ODBC DSN connections are configured using the ODBC Data Source (32 bit) tool found on the Control Panel window of a Microsoft Windows ME/98/95 or NT 4.0 operating system by navigating:

Start→Settings→Control Panel→ODBC Data Source (32bit)

Alternatively, using Windows 2000/XP, you navigate by entering:

Start→Control Panel→Administrative Tools→Data Sources (ODBC).

This will produce the ODBC DSN administration window shown below.

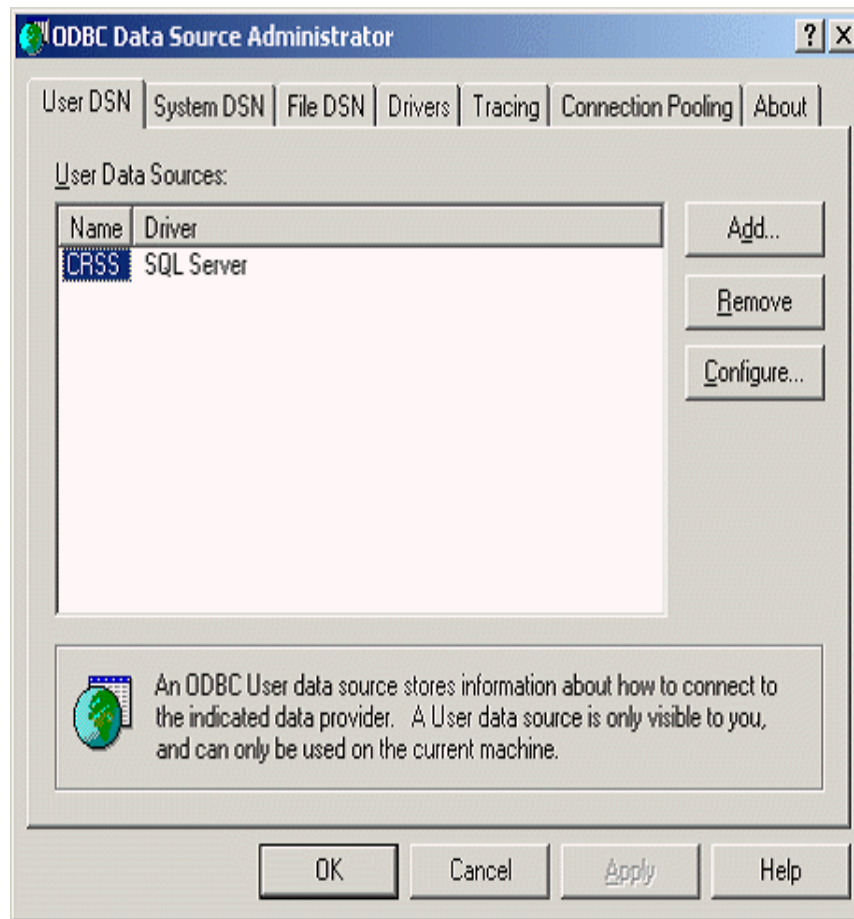


Figure: Starting to Setup a Microsoft SQL Server ODBC Data Source

Now push the **Add** Button. You will then be presented with the next window:

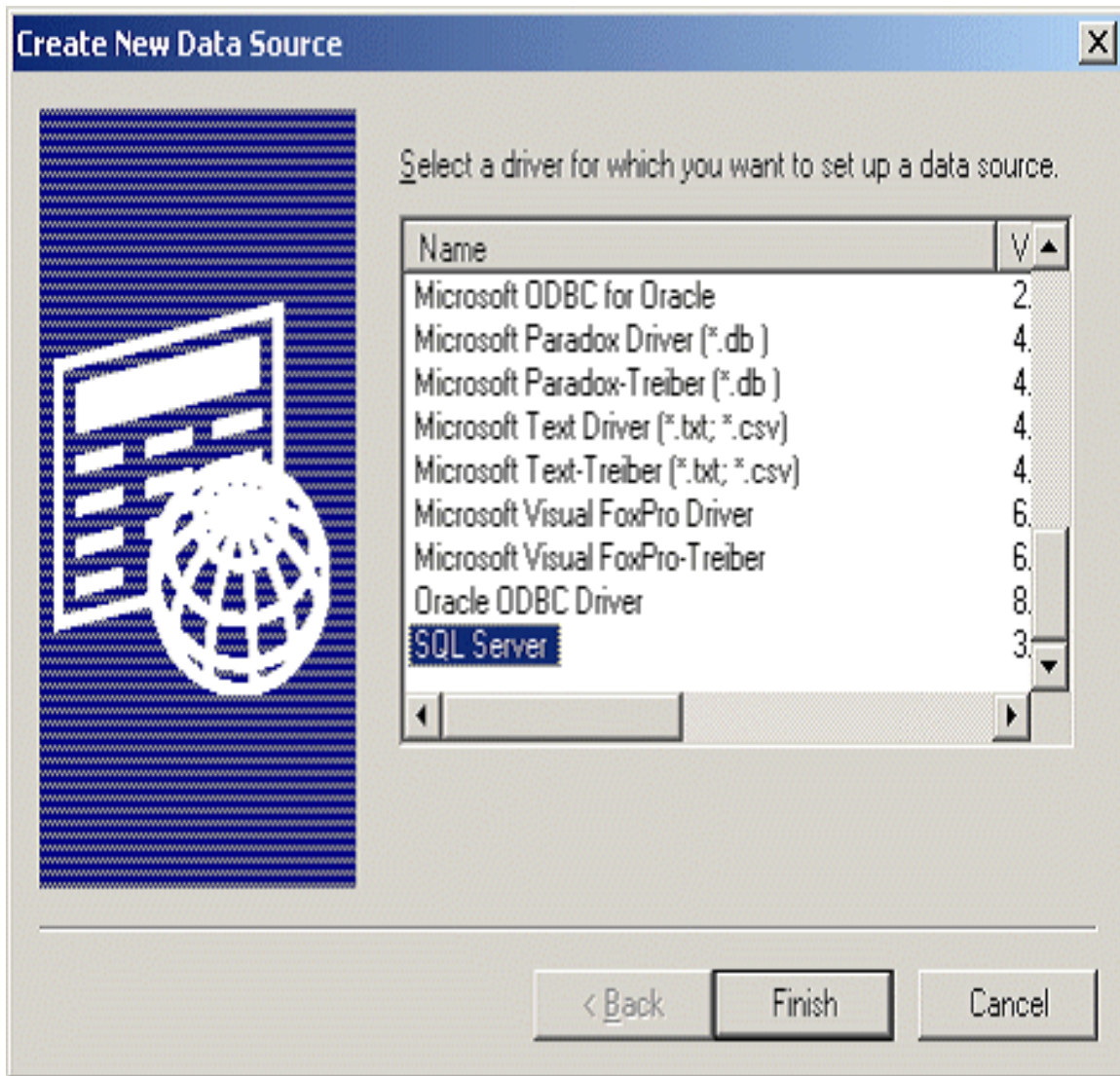


Figure: Selecting the Microsoft SQL Server ODBC Data Source Driver

You need to tab down to the **SQL Server** item in the list box and then select the **Finish** button.

You will then get the following window:

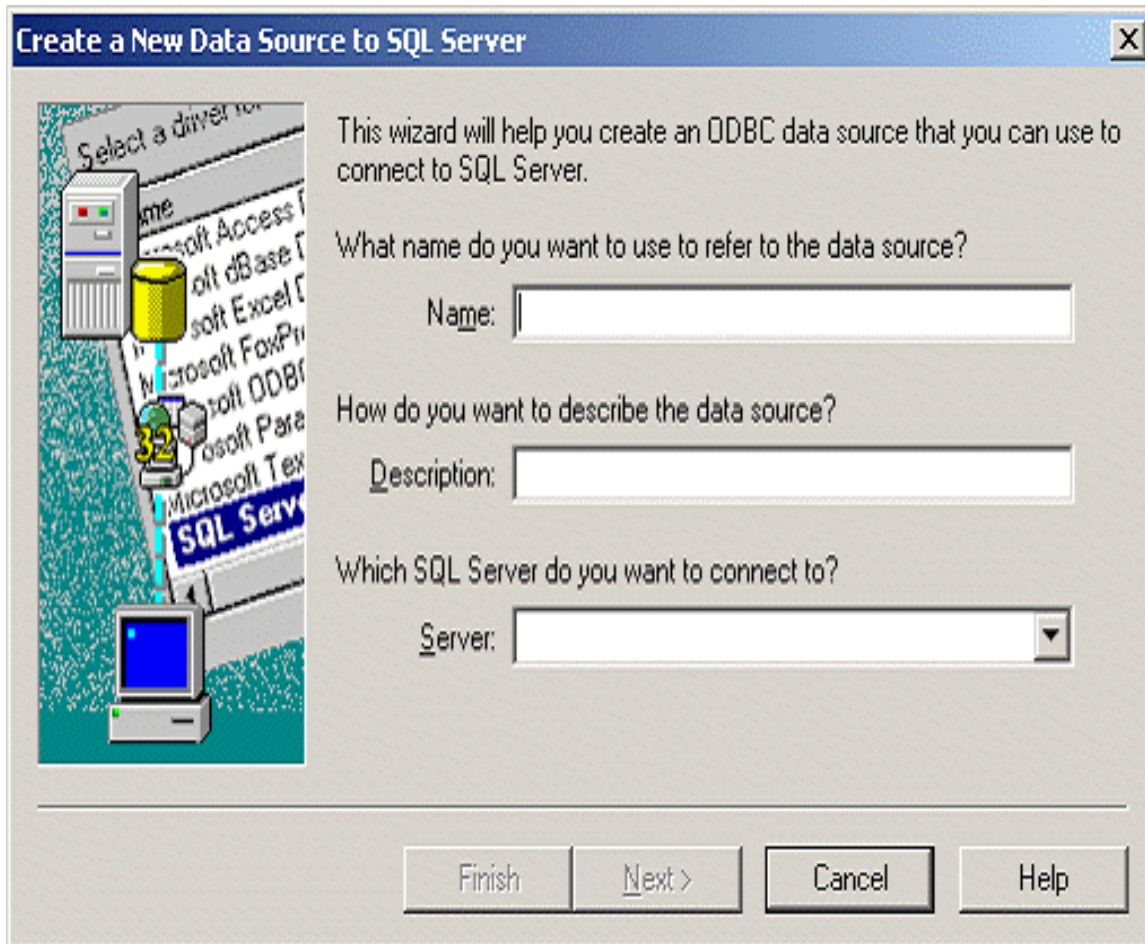


Figure: Naming a Microsoft SQL Server ODBC Data Source

You need to enter **defectmgr** into the **Name** field. You will need to talk to your database administrator about filling in the other fields required to complete this data source entry.

Once again click the **OK** button.

You will then be returned back to the ODBC Data Sources Dialog as show below:

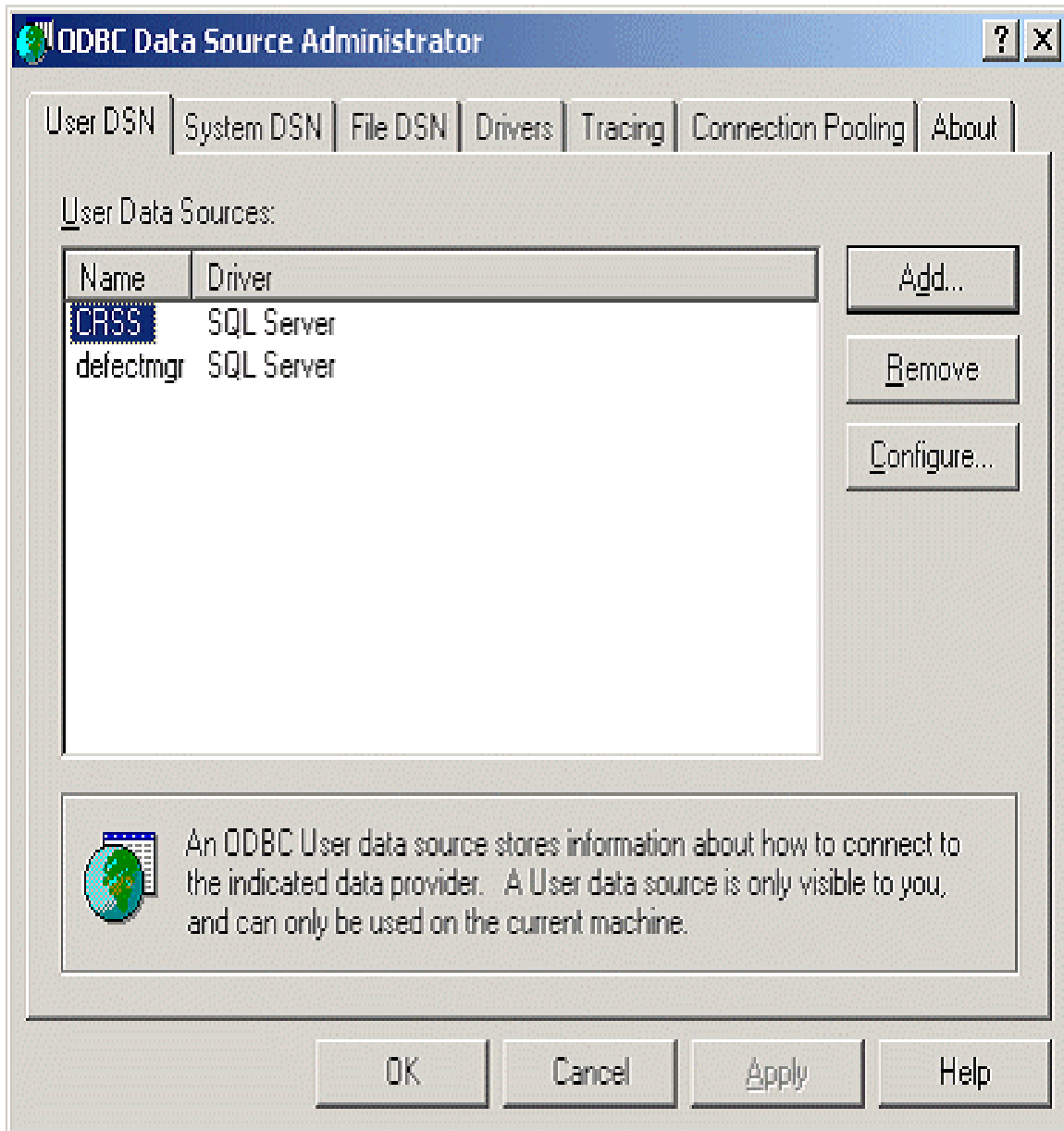


Figure: Completing the Setup of a Microsoft SQL Server ODBC Data Source

You can now click the **OK** button.

Deploying the Defect Manager for Windows System

After you have designed, configured and tested the system, you will want to deliver the system to all the users in your company that will use the system. There are several options available for deploying the Defect Manager systems:

- *Defect Manager for Windows* – Client/Server implementation for LAN users
- *Defect Manager for Web* – Web implementation for Internet/Extranet users
- *E-Tech Support* – Web implementation for Internet clients you support

One thing you need to keep in mind is that *Defect Manager for Windows* is a **client/server** application. This means that your users will run their “Client” applications on their workstations with the application software loaded into either:

- A hard drive that is attached to their PC-workstation

or

- A **shared directory** on a hard drive located on a LAN server.

The Defect Manager Repository is typically located on a separate PC-server platform on the LAN.

The *Defect Manager for Web* and *E-Tech Support* systems are based on a web server so these applications are not deployed on the PC workstations since they use a browser program such as Microsoft Internet Explorer (IE) or Netscape Navigator. The web-based application installation considerations are covered later in section: [Installing Defect Manager for Web](#) and [Installing E-Tech Support](#).

The next few sections are dedicated to looking at the choices you have for deploying the client and the database portions of the Defect Manager system.

Deploying the Client Application

There are basically two things you need to consider when deploying the client application. The first is the location of the application and the second is the configuring of the ODBC data source. Lets examine these two things in closer detail.

Client Application Location

There are only two choices of where to put the *Defect Manager for Windows* client application.

1. Each user installs the product on their workstation’s hard drive from a network drive or from the product CD or web download.
2. Install the product in a shared network-drive accessible to all the users. (Obviously the user would need to be part of the domain or workgroup, but that is a very common situation).

To make your life easier, we **strongly** recommend you choose the second (#2) of the two approaches for several reasons.

- When you need to apply fixes or upgrades to the software you only do it in **one** place. (i.e. to the one shared network drive). Otherwise, you will have to manage the installation of updates on all user workstations.
- You avoid the possibility of someone incorrectly installing the product and the associated troubleshooting and support of multiple workstations. If you have lots of users and workstations, this could take a long time.

We also recommend that you configure the shortcuts to the product appear on the desktop when they connect to the domain, so you don't have to set up the shortcuts on each machine.

When installing on a network drive, you can “share” the directory with the others that will be using the system. Defect Manager does support the *Universal Naming Convention (UNC)* for data files to make it easier for other users access the Defect Manager product.

After you have installed the product to a server on the LAN, you can run the Defect Manager network install on each users machine to allow the user to access *Defect Manager for Windows*. This needs to be done for the following reasons:

- Sets up the proper shortcuts for Defect Manager on the user's workstation
- Installs the reporting components on the user's workstation

If you do not do this, reporting will not work for each user.

The network install is located in the /Network Install directory under the root directory where you installed the product. Just run the **setup.exe** program from the /Network Install on each users machine.

When you run this **setup.exe** prompt, you will only be given one prompt, as show below.

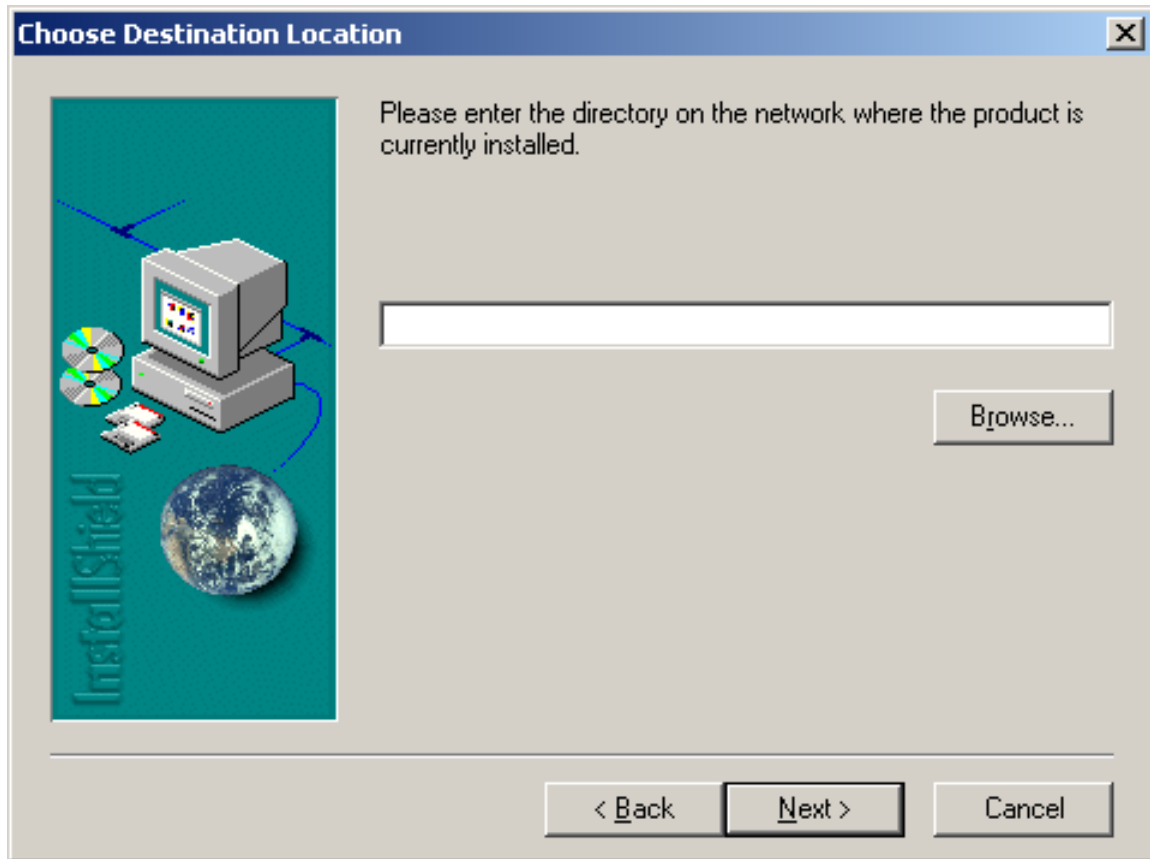


Figure: Defect Manager for Windows Setup Prompt Window

This is where you specify the location of the Defect Manager installation on the network server. This can be specified as a pathname or a UNC name. For example, you might enter the following:

Z:\\Program Files\\Tiera Software\\Defect Manager Release 46

or

\\servermachine\\DefectManager

Passwords

Defect Manager has its own user name and password system. When you logon to Defect Manager, you will be prompted for a user name and password. The logon identifies the current user; this allows Defect Manager to enforce permissions and restrictions on a user's operations.

Defect Manager uses an underlying database as its repository. When it is an industrial-strength database such as Oracle, SQL Server, IBM DB2, Sybase, Ingres and Postgres, they require user names and passwords to access certain resources. When any of these databases are used with Defect Manager, you will need to consider the following.

When you configure Defect Manager, there are several options on how the user will enter passwords. Regardless of which option you choose, the user must always enter the user name and password in the Defect Manager Login screen that has been defined for the user in the Defect Manager repository.

The Defect Manager system administrator is allowed to view these user name and passwords.

When starting the **Defect Manger Log** and **Defect Manager Admin** programs, password security will always be enforced by the Defect Manager Logon screen.

After entering user name and password, Defect Manager will then need to establish a connection to the database so the user name and password that was entered can be verified by data stored in the Defect Manager repository.

This raises the question of "What user name and password should Defect Manager use to connect to the repository database?" There are three choices:

1. Defect Manager will prompt the user for the database user name and password.
2. The second choice is that Defect Manager will pass the user name and password that was entered on the Defect Manager Logon window and use it to gain access to the repository database.
3. Defect Manager will always use the same user name and password to establish a connection to the underlying database.

Why so many choices? The answer to this question is that each organization has different rules on how user names and passwords are set up for individuals and its databases. Defect Manager provides support for these different security schemes.

Consider the following table.

Option Type	Benefits	Tradeoffs
1. Prompts the user for database user and password. LogonOption=P	The user will always be authenticated by the database every time they use Defect Manager. The user is only accessing database resources for them.	User has to <u>remember and enter</u> the Defect Manager user name and password, and the Database user name and password <u>every time</u> . There must be a <u>unique</u> database account for every user of Defect Manager.
2. Uses the user name and password from the Defect Manager Logon window. LogonOption=U	The user will always be authenticated by the database every time they use Defect Manager. The user is only accessing database resources for them. The user only has to remember the Defect Manager user name and password.	There must be a <u>unique</u> database account for every user of Defect Manager. The database user name and password <u>must always match</u> the Defect Manager user name and password.
3. Always use the same user name and password for each user. LogonOption=D	Never need to add new database users when adding new Defect Manager users. The user only has to remember the Defect Manager user name and password.	<u>All users</u> will be authenticated by the database as the <u>same user</u> . All users are accessing the same database resources. If someone does something inappropriate, you cannot track down who did it.

After you have decided which option is the best for you, proceed to the next section where we will tell you how to set the option that you select.

Note: These options are not valid when using a FILE DSN. When using a FILE DSN, you specify the userid and password by setting the UID=username and PWD=password parameters in the FILE DSN file directly. For additional information, see section: [Using a FILE DSN](#).

Defect Manager Initialization File

In general, the Repository contains both the data and configuration data, However, there is one exception currently.

The options on how we connect to the database must be kept on a local disk drive in a windows initialization file. The name of the file is **DefectManager.ini**. The Defect Manager initialization file is read when you start Defect Manager. Defect Manager first looks for this file in the:

1. Windows System directory on the local platform
2. Then in the \bin directory where the product has been installed. When the product is installed a DefectManager.ini file is placed there by default..

For example, a **DefectManager.ini** file looks something like this:

```
[Config]
LogonOption=P
UID=username
PWD=password
```

The initialization file parameters are explained below:

- The **LogonOption** specifies how you want the database user name and password set. This option has three possible values, as follows:
 - P** – Prompt for database username and password
 - U** – Use the Defect Manager entered user name and password
 - D** – Use the UID and PWD parameters as the Default values
- The **UID=** and **PWD=** parameters are only used when selecting option **D**. When you use option **D** set the UID=username and the PWD=password. This is the single database username and password that will be shared by all Defect Manager users connecting to this repository database. See section [Passwords](#) for more info on these choices.

Upgrading The System

If you are installing Defect Manager for the first time, you do not need to upgrade the system.

If you are a current Defect Manager user, you will need to upgrade your current system.

Before upgrading, we recommend the following test procedure:

- (1) Install Defect Manager Release 4.6 as described in the [Installation Guide](#).
- (2) Copy your production repository database to make a new database. You will use this database to test Defect Manager 4.6 with your production data before going live.
- (3) Copy the file **DefectManager.ini** from the **\bin** directory in the existing Defect Manager installation to the **\bin** directory of the Release 4.6 installation.
- (4) Copy all files (and all sub directories) under the existing **\Attachments** directory into the **\Attachments** directory in the Release 4.6 installation directory.
- (5) Create a new **defectmgr** FILEDSN that points to the new copy (created in step #2) of your production database. Put the new **defectmgr.dsn** in the Release 4.6 **\bin** directory.
- (6) Open a Command Window (cmd.exe). On the command line change the current directory (using the CHDIR DOS command) to the **\bin** directory in the Release 4.6 installation and run the **upgrade.exe** program. You can also use Windows Explorer to run upgrade.exe by double clicking on it.
- (7) Test Defect Manager 4.6 using the new copy of your production repository data by experimenting with some operations and reports. Try some of the new features. Make sure your data looks correct.

After you feel comfortable with Release 4.6 and want to go live, you should perform the following steps.

- (1) Backup your existing database.
- (2) Copy the **DefectManager.ini** from the **\bin** directory in the existing Defect Manager installation to the **\bin** directory of the Release 4.6 installation.
- (3) Copy all files (and all sub-directories) under the **\Attachments** directory in the existing Defect Manager installation to the **\Attachments** directory in the Release 4.6 installation.
- (4) Copy the **defectmgr.dsn** (or **defectmgrwe.dsn**, if using Access) under the **\bin** directory in the existing Defect Manager installation to the Release 4.6 **\bin** directory.
- (5) Open a Command Window (cmd.exe). Change the current directory to the **\bin** directory of the Release 4.6 installation (using the CHDIR DOS command) and run the **upgrade.exe** program.

When you are running the **upgrade.exe** program, you will see a lot of output displayed on your monitor which will be very difficult to read as it scrolls by quickly. That's OK.

All of the output that is displayed is also written to a log file in the **\upgrade** sub-directory. You will only be interested in viewing the last line that is displayed on the screen. The last line will tell you whether the system has been upgraded successfully or not. If the system has been upgraded, Defect Manager is ready for use.

If the last line tells you that it could not upgrade the system, you can e-mail and attach the output from the upgrade.exe program run that was recorded in the log file to Tiera Software Technical Support. The upgrade log file to attach is located in the Release 4.6 **\upgrade** directory.

When you upgrade the system by running upgrade.exe from the **\bin** directory, the **upgrade.exe** program makes the following assumptions:

- The home directory for Defect Manager is **one** directory above upgrade.exe.
- If a FILEDSN is found in the same directory as upgrade.exe (which will probably be the case), it will upgrade the associated database. If the FILEDSN does not exist, it terminates without upgrading a repository database.

If you are not using a FILEDSN, and you are using a user/system ODBC DSN (Data Source Name) as a source, you can use the DBUSER and DBPASSWORD command line parameters to specify the username and password associated with the user/system data source.

You can also specify the location for the FILEDSN and HOME directory via command line parameters.

Defect Manager is a standalone executable program that accepts the following parameters:

```
upgrade HOME="dmhomepath" FILEDSN="dmfiledsnpath"  
DBUSER="dbusername" DBPASSWORD="dbpassword"
```

Please observe the following notes:

- All parameters are separated by blanks.
- All parameter values such as *dmhomepath*, that contain embedded blanks must have quotes around them.
- There should be no spaces between a parameter name and a parameter value.

Explanation of parameters follows.

- **[HOME=*"dmhomepath"*]**

This parameter is the path where the Defect Manager product is installed. If the product was installed in c:\Program Files\Defect Manager, then this parameter would be:

```
HOME="c:\Program Files\Defect Manager"
```

- **[FILEDSN=*"dmfiledsnpath"*]**

This optional parameter is the path where the FILEDSN is located. The FILEDSN is used to connect to the database via an ODBC Data Source Name (DSN).

- The Defect Manager Reminder program will automatically look for the *defectmgrwe.dsn* (the default, for Microsoft Access repository).
If you are using Access to implement your repository, this DSN is the default so you can omit this parameter.
- If you are using another type of database to implement your repository, use the FILEDSN value *defectmgr.dsn* (for SQLServer, Oracle, IBM DB2, Sybase, Ingres, and Postgres) in the \bin directory where you installed the product.
- If you are using a FILEDSN in another location, such as
c:\Document Settings\Common\ODBC\defectmgr.dsn,
then this parameter would be:

FILEDSN=" c:\Document Settings\Common\ODBC\defectmgr.dsn"

- **[DBUSER="dbusername"]**

This optional parameter is used if you configured the system with an ODBC DSN (data source name) of *defectmgr* .

A Microsoft Access database does not require this parameter, but the other types of databases used to implement the repository require it. If the specified user name requires a password, then you will also need to specify the **DBPASSWORD** parameter as well.

- **[DBPASSWORD="dbpassword"]**

This optional parameter is used only if you configured the system with an ODBC data source of *defectmgr* (for SQLServer, Oracle, IBM DB2, Sybase, Ingres, and Postgres) and the DBUSER name requires a password.

Deploying Defect Manager for Web

Defect Manager Release 4 introduced two new web components that you can install and use to deploy on a web server.

- **Defect Manager for Web** – A way for local and remote users to access the Defect Manager features, repository and knowledgebase over the internet or extranet.
- **E-Tech Support** – A way for remote clients and third-parties to access the Defect Manager repository and knowledgebase on a limited basis over the internet.

Defect Manager for Web is essentially the same as the Defect Manager for Windows, except that it runs from a web browser.

The web interfaces require IIS 5.0 or greater. The web interfaces are written using Active Server Pages (ASP.net) and include a single COM+ component. When you install the product on the web server, the COM+ component (**plogcomponent46.dll**) is installed and registered automatically.

To configure the Defect Manager Web interface, you will need to perform the following steps:

1. Make the Defect Manager web pages available from the web server (IIS) – Using the IIS Administrator, create a virtual directory named **dm465prod** that points to the **web\defectmgr.net** sub-directory where you installed the product. This is usually, **c:\Program Files\Tiera Software\Defect Manager Release 460\web\defectmgr.net**. Make sure that the virtual directory is enabled for **ASP.net 2.0**.
2. Enable the ASP.NET (if on domain this is usually the local network service) on to have full control of the Defect Manager installation which is usually **c:\Program Files\Tiera Software\Defect Manager Release 460**.
3. If you are installing on a Windows Server 2003 or Windows XP Pro, you will need to follow this additional steps. Right click on the virtual directory in step 1. and select **Properties**. Next, press the **Configuration** button in the right corner. When the Application Configuration window appears, select the **Options** folder. Check the **Enable parent paths** checkbox and make sure the **Default ASP Language** is **VBScript**. Then click the **OK** button to close the current property page, and then select the **OK** button again to close the main property page. Secondly, if you are installing on Windows 2003 Server, you must also allow IIS to process ASP .net pages. To do so, click on the **Web Services Extensions** in the IIS application tree. In the right pane, click on **ASP .net 2.0** and press the **Allow** button.
4. If you did not take the defaults at installation time, you will need to change the **web.config** file located in the **web\defectmgr.net** sub-directory. Two statements need to be changed.

The is to modify line 3 from:

```
<add key="DefectManagerFILEDSN" value = "c:\Program Files\Tiera Software\Defect Manager Release 460"
```

to

```
<add key="DefectManagerFILEDSN" value = "fullpathname where  
you installed the product "/>
```

The second change is to modify line 4.

If you are using Access as the database repository, then change line 4 from:

```
<add key="DefectManagerHome" value="FILEDSN=c:\Program  
Files\Tiera Software\Defect Manager Release  
460\bin\defectmgrwe.dsn"/>
```

to

```
<add key="DefectManagerHome" value="FILEDSN="fullpathname  
where you installed the product\bin \defectmgrwe.dsn"/>
```

If you are using SQLServer Or Oracle as the database repository, then change line 4 from:

```
<add key="DefectManagerHome" value="FILEDSN=c:\Program  
Files\Tiera Software\Defect Manager Release  
460\bin\defectmgrwe.dsn"/>
```

to

```
<add key="DefectManagerHome" value="FILEDSN="fullpathname  
where you installed the product\bin \defectmgr.dsn"/>
```

You can test this by opening a browser and using the following URL:

<http://hostname/dm465prod/>

where

Hostname is the name of the machine where you installed Defect Manager.

Deploying E-Tech Support

To install and configure the *E-Tech Support* subsystem, you will need to perform the following steps to deploy the system on a web server:

To configure the Defect Manager Web interface, you will need to perform the following steps:

1. Make the Defect Manager web pages available from the web server (IIS) – Using the IIS Administrator, create a virtual directory named **etechsupport** that points to the **web\etechsupport.net** sub-directory where you installed the product. This is usually, **c:\Program Files\Tiera Software\Defect Manager Release 460\web\defectmgr.net**. Make sure that the virtual directory is enabled for **ASP.net 2.0**.

2. Enable the ASP.NET user to have full control of the Defect Manager installation which is usually **c:\Program Files\Tiera Software\Defect Manager Release 460**.
3. If you are installing on a Windows Server 2003 or Windows XP Pro, you will need to follow this additional steps. Right click on the virtual directory in step 1. and select **Properties**. Next, press the **Configuration** button in the right corner. When the Application Configuration window appears, select the **Options** folder. Check the **Enable parent paths** checkbox and make sure the **Default ASP Language** is **VBScript**. Then click the **OK** button to close the current property page, and then select the **OK** button again to close the main property page. Secondly, if you are installing on Windows 2003 Server, you must also allow IIS to process ASP .net pages. To do so, click on the **Web Services Extensions** in the IIS application tree. In the right pane, click on **ASP .net 2.0** and press the **Allow** button.
4. If you did not take the defaults at installation time, you will need to change the **web.config** file located in the **web\etechsupport.net** sub-directory. Two statements need to be changed.

The is to modify line 3 from:

```
<add key="DefectManagerFILEDSN" value = "c:\Program
Files\Tiera Software\Defect Manager Release 460"
```

to

```
<add key="DefectManagerFILEDSN" value = "ful lpath name where
you installed the product" />
```

The second change is to modify line 4.

If you are not using Access as the database repository, then change line 4 from:

```
<add key="DefectManagerHome" value="FILEDSN=c:\Program
Files\Tiera Software\Defect Manager Release
460\bin\defectmgrwe.dsn" />
```

to

```
<add key="DefectManagerHome" value="FILEDSN="fullpathname
where you installed the product\bin \defectmgrwe.dsn" />
```

If you are using SQLServer Or Oracle as the database repository, then change line 4 from:

```
<add key="DefectManagerHome" value="FILEDSN=c:\Program
Files\Tiera Software\Defect Manager Release
460\bin\defectmgrwe.dsn" />
```

to

```
<add key="DefectManagerHome" value="FILEDSN="fullpathname
where you installed the product\bin \defectmgr.dsn" />
```

You can test this by opening a browser and using the following URL:

<http://hostname/etechsupport/>

where

hostname is the name of the machine where you installed Defect Manager.

POP Server Support

Many e-mails are sent to your company from a variety of sources asking for information, or reporting certain issues. The Defect Manger POP Server allows Defect Manager to read e-mail (and their attachments) from any POP3 e-mail boxes and enter those issues into the Defect Manager repository. This allows your company to organize, monitor, manage and resolve e-mail questions and issues from a central location using a single tool.

Setting up the POP Server is a two step process. The first step is to configure the e-mail boxes to be processed. The second step is to install the POP server system service.

To configure POP Server support you need to use the Defect Manager Windows interface. Please review the Defect manager Administration Guide – Windows for more information.

Configuring POP Servers

POP Server's can be configured using the Defect Manager Administrator for Windows interface.

To configure POP Server support, select the ***File->Repository Settings*** menu item and then select the ***POP Server Tab***. It is shown below in the following figure.

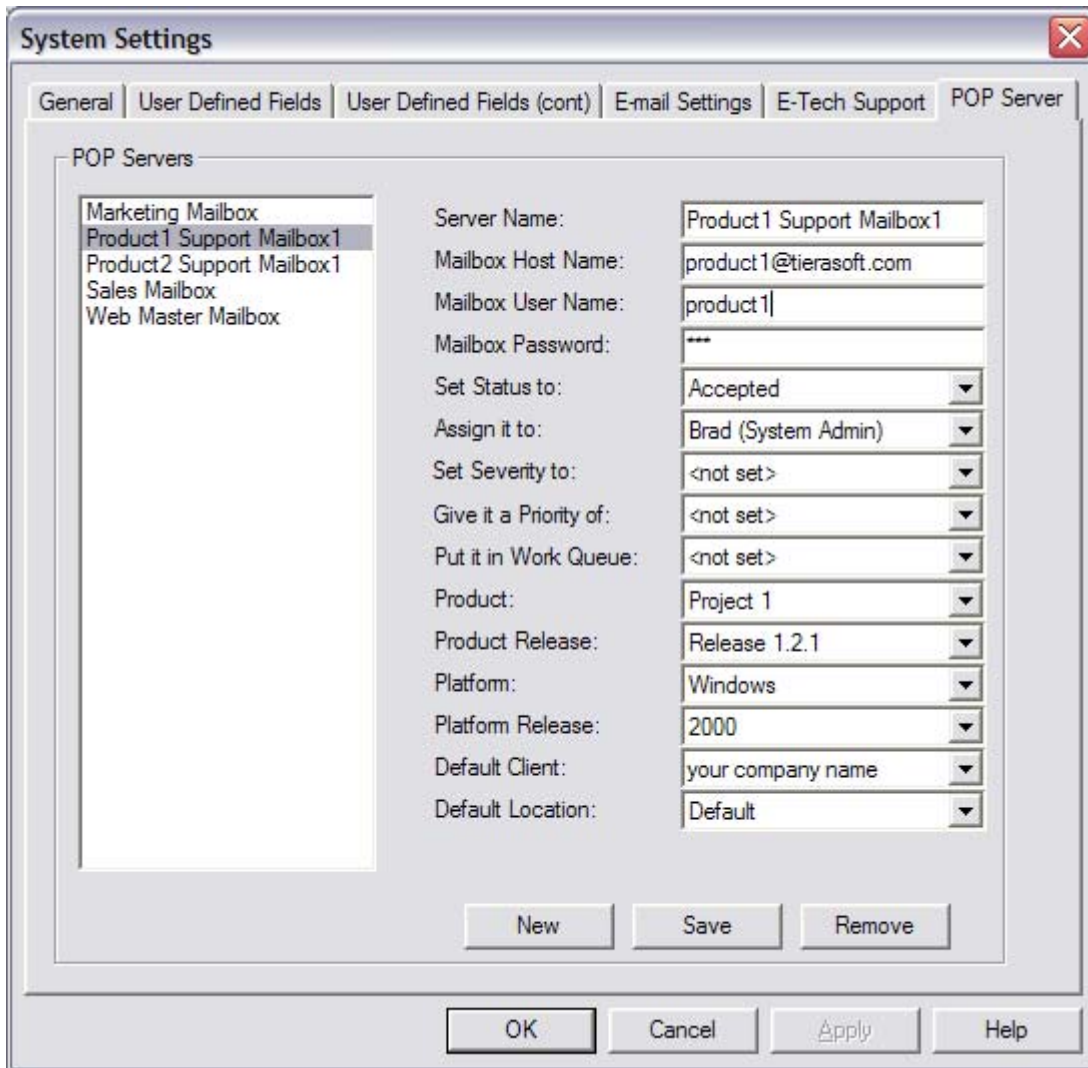


Figure: Configuring POP Servers

To add a POP Server, follow these instructions.

- Click the **New** button.
- Enter the following fields.
 - **Server Name** – The descriptive name for this POP Server e-mail box.
 - **Mailbox Host Name** – The hostname where the e-mail box exists. This is usually a domain name such as mail.domain.com for example.
 - **Mailbox User Name** – The user name for the e-mail box.
 - **Mailbox Password** – The password for the user name for the e-mail box.
- Select the remaining default issue fields such **Status**, **Assignee**, etc.

- Click the **Save** button.

To modify a POP Server, follow these steps.

- Select the POP Server from the POP Servers List.
- Change the Settings.
- Click the **Save** button.

To remove a POP Server, follow these steps.

- Select the POP Server from the POP Servers List.
- Click the **Remove** button.

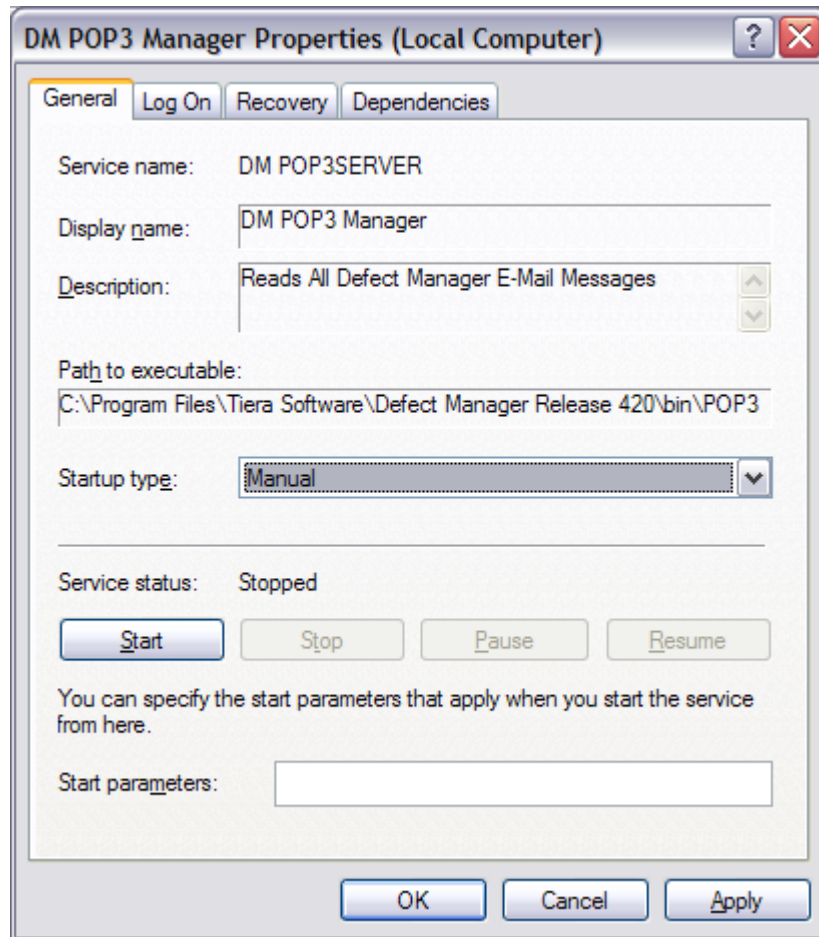
Installing and Starting the POP Server Service

The POP Server process is a system service that reads E-mail inboxes and places them in the Defect Manager repository. To install the service, click on the **POP3ServerServiceInstall.bat** file located in the Defect Manager \bin sub-folder. After running this batch file, the service be installed. Before the service can start reading e-mail boxes, it needs to be running. To start the service, follow these steps.

- Navigate to the **Services** application by selecting **Start → Control Panel → Administrative Tools → Services**.
- Locate the service named **DM POP3 Manager** in the list of services.
- Right click on this entry and select the **Start** menu item.

The service will start and stay active until you reboot the system. When the system restarts you will manually need to start the service again. If you want to have the service start automatically every time the system restarts (this is the preferred way), then follow these steps.

- Navigate to the **Services** application by selecting **Start → Control Panel → Administrative Tools → Services**.
- Locate the service named **DM POP3 Manager** in the list of services.
- Right click on this entry and select the **Properties** menu item.
- Select the **Startup Type** field to automatic as show below



■ **Figure: Automatically starting the POP Service**

Troubleshooting POP Server Errors

If the POP server unexpectedly terminates, there are two places to look to help figure out why. The first place is the System Event Viewer and the POP Server Log. The *POP3Server.exe* places the log file in the *\POP3Server\Log* directory.

The log filename format is:

logmm-dd-yyyy-hh-mm-ss.txt

where **mm** is month,

dd is day,

yyyy is year,

hh is hour,

mm is minute and

ss is the second that the reminder was run.

You can view this file with any text file viewer, including notepad. You should periodically delete obsolete log files to reclaim disk space.

E-mail Manager

Defect Manager sends e-mail alerts and e-mail form letters based on certain situations that arise during the normal operation of the system. To maximize user response time and resource usage, Defect Manager caches the e-mail alerts and e-mail form letters in the repository. It is up to the **E-mail Manager** to read the e-mail cache and send the e-mails to their intended recipients.

The next two sections describe how to start/stop and troubleshoot any issues with the E-mail Manager.

Installing and Starting the E-mail Manager

To send system generated e-mails, the **E-Mail Manager** service must be started. To install the service, click on the **MailManagerServiceInstall.bat** file located in the Defect Manager \bin sub-folder. After running this batch file, the service is now installed. Before the service can start reading e-mail boxes, it needs to be running. To start the service, follow these steps.

- Navigate to the **Services** application by selecting **Start→ Control Panel→Administrative Tools→Services**.
- Locate the service named **DM Mail Manager** in the list of services.
- Right click on this entry and select the **Start** menu item.

The service will start and stay active until you reboot the system. When the system restarts you will manually need to start the service again. If you want to have the service start automatically every time the system restarts (this is the preferred way), then follow these steps.

- Navigate to the **Services** application by selecting **Start→ Control Panel→Administrative Tools→Services**.
- Locate the service named **DM Mail Manager** in the list of services.
- Right click on this entry and select the **Properties** menu item.
- Select the **Startup Type** field to automatic as show below

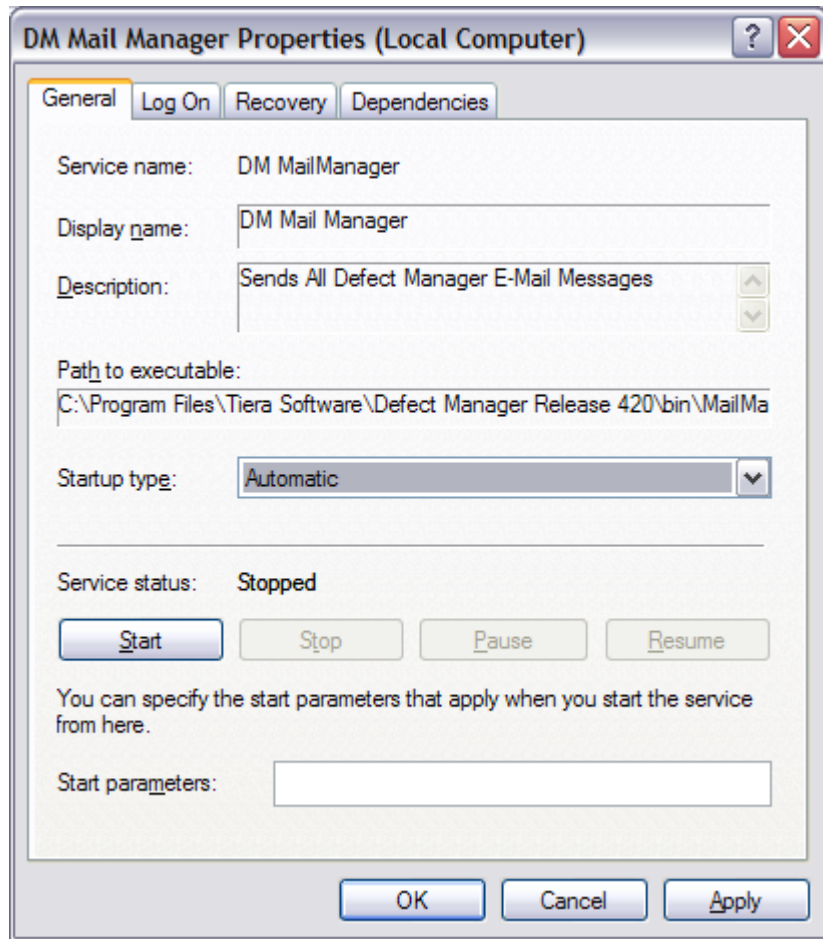


Figure: Automatically starting the E-mail Manager Service

Web Security

There are many things you need to consider when you deploy any web application. If you are not familiar these issues, you should consult an Internet security expert.

Defect Manager supports several levels of security:

- User security – Using the Defect Manager Administrator you set passwords and privileges for users
- Win/NT Security – If you set up IIS to use **Basic** or **Challenge/Response** security, Defect Manager will use the username and password that is authorized by the Win/NT operating system as the username and password to log on to Defect Manager. This is true for both **Defect Manager for Web** as well as **E-Tech Support**. When the user tries to access Defect Manager, they will be given a dialog box to enter their credentials.

When using Win/NT security, you need to define each Defect Manager user to the operating system.

If the operating system authenticates the user, Defect Manager and the workstation must use the same username and password. This means that you will need to add the same username and password to the Defect Manager repository whenever you add a new username and password to the operating system.

Installation Checklist

Defect Manager has been designed for easy installation requiring a minimum of time and effort. Typically a single system administrator can install Defect Manager for an organization in a matter of a few hours or less depending the complexity of your user network and the degree of customization you wish to make to Defect Manager.

Installation Checklist Overview

Below, you will find a checklist of tasks that need to be performed to successfully install Defect Manager. You can also review the on-line help file for more information after Step 3 in the installation checklist has been completed. You can view the help file by selecting the Defect Manager Help shortcut that is created by the installation setup program.

If you have problems, you can use any of the following support mechanisms:

- The welcome letter that you received will provide you with all the information you need to get started.
- Go to http://www.tierasoft.com/support_login.asp to access the support knowledgebase and, optionally, report a problem.
- E-mail technical support support@tierasoft.com
- Contact the technical support person that to assigned to you via phone, e-mail, etc.
- Call our toll free support number

Follow the installation checklist steps shown below.

Step 1: Create the Defect Manager Repository Database

Step	Done By	Instructions
1. Create the Defect Manager Repository Database.	DBA	<p>Access database: Use the defects.mdb repository database that ships with the product or use the ODBC Manager and Microsoft Access to create an empty Access database (.mdb).</p> <p>If you are going to use the supplied defects.mdb that ships with the product, then you only need to perform Steps 3, and 5.</p>
	DBA	<p>All other databases: Consult the appropriate database documentation to create a database for the Defect Manager repository.</p> <p>We do not require any special database attribute settings or database features. Just create a database that has ample space.</p> <p>It is hard to estimate how large to make the database because each company's capacity needs are different as well as the amount of information associated and attached to each defect-issue item.</p> <p>As a general estimating factor, you can assume the Defect Manager Repository database requires: 100MB / 5,000 stored defect-issue items.</p>

Step 2: Create Repository Database Usernames & Passwords

Step	Done By	Instructions
2. Create the database user(s) that connect to the Defect Manager Repository database(s)	DBA	Access database: N/A for Microsoft Access databases
	DBA	<p>All others: This is the Defect Manager user(s) that will connect to the repository database.</p> <p>Defect Manager has its own internal security, where you can establish specific user privileges for each user.</p> <p>You do <u>not</u> need to add a database user for each Defect Manager user of the system. Defect Manager can connect to its repository database using a single database username and password pair for all users.</p> <p>The database user you create must be GRANT'ed the following privileges using SQL:</p> <ul style="list-style-type: none"> • CREATE – Only used to create the repository. Can be revoked after the repository has been created. • SELECT • INSERT • UPDATE • DELECT – Only required when users are allowed to delete defects. <p>When using multiple repositories, repeat this step for each repository database.</p>

Step 3: Install Defect Manager Software

Step	Done By	Instructions
3. Install Defect Manager Software Product	Win/NT System Administrator	User's Workstation Install: The Defect Manager product software must be installed on the hard drive for each workstation.
	Win/NT System Administrator	<p>LAN Server Install: <i>The recommended approach.</i> Install the Defect Manager product software on a selected server in your LAN network in a shared drive and directory folder.</p> <p>You must do the network workstation install operation from each user's workstation to configure the desktop shortcuts and reports for each user.</p> <p>The network install setup program will be in the Network Install sub-directory where you installed the Defect Manager product. You must make sure that the /bin sub-directory where Defect Manager is installed is configured as shared.</p>
	Win/NT System Administrator	CD-ROM Install: If you are installing the product from its release CD-ROM, place the CD in the CD drive on the server machine. If the CD does not automatically begin installing, run the setup.exe program from the CD-drive root directory.
	Win/NT System Administrator	Web Download Install: If you are installing the product from a web-download, unzip the downloaded file into a temporary directory
		Note: As a part of the install process, you will select the network directory folder (root directory) where Defect Manager is installed.

Best Practice: *The recommended approach is to install Defect Manager on a LAN Server with a shared **/bin** folder.* This will minimize system maintenance since the workstations are all sharing one install-point on the server. You can follow UNC file naming conventions when setting up Defect Manager.

Any workstations that cannot access the server machine will need additional installs of the product to the local hard drive on their workstation or a to a server that is on its local LAN.

Step 4: Create Default ODBC DSN Connection

Step	Done By	Instructions
4. Create default ODBC DSN for Defect Manager to use to connect with its repository database.	Win/NT System Administrator	<p>Access Database: Use the ODBC Administrator to create a FILE DSN named defectmgrwe.dsn for the demonstration or Access database you created in step 2.</p> <p>After the FILE DSN is created, copy it into the \bin sub-directory.</p>
		<p>Other databases: Use the ODBC Administrator to create a FILE DSN named defectmgr.dsn for the database user(s) you created in step 2. More than one FILE DSN is needed, if multiple repositories are used.</p> <p>After the FILE DSN has been created, edit the defectmgr.dsn file and specify two additional parameters on separate lines of the file:</p> <ol style="list-style-type: none"> 1. UID=<database username> 2. PWD=<database password> <p>Save the defectmgr.dsn file and copy it to the \bin directory.</p>

Step 5: Create the Defect Manager Repository

Step	Done By	Instructions
5. Create the Defect Manager Repository and Check System Settings	Win/NT System Administrator	<p>On the Server Platform:</p> <ol style="list-style-type: none"> 1. Copy the license you were e-mailed from Tiera Software into the \bin sub-directory. <p>The license file contains the information about your database type. If you do not copy the license file Defect Manager will assume you are using the default database – Microsoft Access.</p> <ol style="list-style-type: none"> 2. Run the <i>Defect Manager Admin</i> program using: Start→Tiera Software→Defect Manager Admin 3. If prompted by the ODBC connect dialog to enter a user name and password, enter the user name and password for the Database-User that you are connecting as. 4. When prompted with the Defect Manager Logon window, specify the user name: Admin and password: Admin. 5. Select: File→Run Script 6. Browse to the \scripts sub-directory where you installed the Defect Manager product. 7. Review and, optionally, edit the Repository Settings. 8. Exit the <i>Defect Manager Admin</i> program

Step 6: Configure the System

Step	Done By	Instructions
6. Configure the Defect Manager System	Defect Manager Administrator	First, Configure the system settings: <ol style="list-style-type: none"> 1. Run <i>Defect Manager Admin</i> program: Start→Tiera Software→Defect Manager Admin 2. Enter Admin as the username and Admin as the password to logon.
		Second, Load Default Objects and Codes using Scripts: <ol style="list-style-type: none"> 1. Select: File→Run Script 2. Browse to the \scripts sub-directory where the Defect Manager product is installed 3. Select the script, such as LoadDefaultStatuses.sql to load the default status codes. 4. Change the password associated with the Admin user name to a secure password.
		Third, Customize System Objects: <i>Use the Defect Manager Admin program to tailor system objects and codes to meet the needs of your organization.</i>

Step 7: Install Defect Manager on each Workstation

Step	Done By	Instructions
7. Install Defect Manager product on each users workstation	Systems Administrator	<p>If you are going to install the complete Defect Manager product on the hard-drive of one or more user's workstations:</p> <ol style="list-style-type: none"> 1. Install the product on the workstation hard disk from the product CD-ROM or Copy a download of the system to the workstation. 2. Run the setup.exe program on the workstation from the CD-drive or the hard-drive on the workstation. 3. Copy the defectmgr.dsn file into the Defect Manager \bin sub-directory on this workstation. 4. Repeat steps 1-3 for each workstation requiring this type of install. <p><i>Note: A network installation is the recommended approach when multiple users are present on a LAN.</i></p>
		<p>If you installed the product on a LAN Server, use the network install in the \Network Install directory.</p> <ol style="list-style-type: none"> 1. Run ...\Network Install\setup.exe to perform the network install on each workstation to share a common installed copy of the programs over the LAN. 2. When prompted by the setup.exe installer program, specify the Defect Manager root directory on the server machine using the format: <network drive>:/<root-pathname> or UNC pathname: //<machine>/<sharename> <p><i>Note: If you do <u>not</u> specify the correct root directory, some features such as reporting may <u>not</u> work properly.</i></p>

Step 8: Setup Defect Manager for Web Components

Step	Done By	Instructions
8. Setup Defect Manager for Web Components	System Administrator or Web Master	<p>Defect Manger for Web, if you will be using it -- you will need to do the following:</p> <ol style="list-style-type: none"> Using IIS, create a virtual directory (any name that you want) that points to the <code>\web\defectmgr.net</code> sub-directory. You will need to allow read access and scripting. The default scripting language should be VBScript <u>not</u> JScript. Make sure you check the Enable Parent Paths option. This is the virtual directory that you will use to run Defect Manager for Web. Enable the directory to have ASP.Net 2.0 support. Allow the user ASP.Net to have full control of the Defect manager Installation. The default installation directory is: c:\Program Files\Tiera Software\Defect Manager Release 460. If you did <u>not</u> install in the default location on the c: drive, or you are using SQLServer or Oracle databases, you will need to edit the web.xml file in the <code>web\defectmgr.net</code> sub-directory and make the following changes: modify line 3 from: <pre><add key="DefectManagerFILEDSN" value = "c:\Program Files\Tiera Software\Defect Manager Release 460" to <add key="DefectManagerFILEDSN" value = "<i>fullpathname where you installed the product</i>" /></pre> <p>The second change is to modify line 4.</p> <p>If you are using Access as the database repository, then change line 4 from:</p> <pre><add key="DefectManagerHome"</pre>



		<p>value="FILEDSN=c:\Program Files\Tiera Software\Defect Manager Release 460\bin\defectmgrwe.dsn"/></p> <p>to</p> <p><add key="DefectManagerHome" value="FILEDSN="fullpathname where you installed the product\bin \defectmgrwe.dsn"/></p> <p>If you are using SQLServer Or Oracle as the database repository, then change line 4 from:</p> <p><add key="DefectManagerHome" value="FILEDSN=c:\Program Files\Tiera Software\Defect Manager Release 460\bin\defectmgrwe.dsn"/></p> <p>to</p> <p><add key="DefectManagerHome" value="FILEDSN="fullpathname where you installed the product\bin \defectmgr.dsn"/></p>
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Step 9: Setup E-Tech Support

Step	Done By	Instructions
<p>9. Setup Defect Manager E-Tech Support Components</p>	<p>System Administrator or Web Master</p>	<p><i>Defect Manager E-Tech Support</i>, if you will be using this interface—you will need to do the following.</p> <ol style="list-style-type: none"> Using IIS create a virtual directory (any name that you want) that points to the \web\etechsupport sub-directory. You will need to allow read access and scripting. The default scripting language should be VBScript <u>not</u> JScript. Make sure you check the Enable Parent Paths option. This is the virtual directory that you will use to run <i>Defect Manager E-Tech Support</i>.



		<p>2. If you did <u>not</u> install Defect Manager in the default location on the c: drive you will need to edit the global.asa in the web\defectmgr sub-directory and make the following changes:</p> <p>Edit line 6 to make sure that the Session(“<DefectManagerHome>”) points to the Defect Manager home directory. The home directory by default is:</p> <p>c:\Program Files\Tiera Software\Defect Manager Release 460\ attachments.</p> <p>Edit line 22 to set the FILE DSN that <i>Defect Manager Web</i> will use to connect to the repository database. If you are using Access this would be:</p> <p>"FILEDSN=C:\Program Files\Tiera Software\Defect Manager Release 460\bin\defectmgrwe.dsn"</p> <p>If you are using SQL Server, Oracle, Sybase, DB2, Ingres or Postgres then the default would be:</p> <p>"FILEDSN=C:\Program Files\Tiera Software\Defect Manager Release 460\bin\defectmgr.dsn"</p>
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Step 10: Install E-Mail Manager Service

Step	Done By	Instructions
<p>10. Install the E-Mail Manger Service</p>	<p>System Administrator</p>	<p>Run MailManagerServiceInstall.bat file located in the \bin folder. By default this would be: c:\Program Files\Tiera Software\Defect Manager Release 460\bin\MailManagerServiceInstall.bat</p>