Roundtable® TSMS 12.3

Installation Guide

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1   Planning

1.1   Introduction

Welcome to Roundtable Total Software Management System. This installation document will guide you through the process of installing Roundtable TSMS. Please read it completely before beginning your installation.

> **IMPORTANT**
> If you are upgrading from a previous version of Roundtable, it is essential that you follow the instructions in Section 3 *"Updating from Earlier Versions of Roundtable"*.

1.2   General

Roundtable TSMS can be run as a client-server application or in application server environment with the Roundtable server software running on an OpenEdge AppServer (AppServer) or Progress AppServer for OpenEdge (PASOE). Depending on your requirements, you may configure both types of installations.

The repository database is an OpenEdge database. You will need to identify a database server platform and verify that the platform has enough capacity to accommodate the number of the Roundtable clients that will be connecting to the repository.

Roundtable TSMS should be installed in a directory that is separate from installations of previous Roundtable products. Roundtable TSMS 12.3 can be used with existing Roundtable repositories after applying schema updates (if any) as detailed later in this document.

After your Roundtable installation is complete, please visit https://www.roundtable-software.com to download any patches that may have been released.

1.3   Compatibility

The Roundtable TSMS 12.3 GUI client software is compatible with OpenEdge 11.7 and later.

The Roundtable TSMS server software is compatible with AppServer 11.7 and later and PASOE 11.7 and later.

The Roundtable repository database can be either an OpenEdge 11.x or an OpenEdge 12.x database.

> **IMPORTANT**
> Roundtable TSMS software earlier than 12.3 is not compatible with Roundtable TSMS 12.3 repository databases. It is recommended that you maintain a separate repository if you require the use of older Roundtable software.

1.4   Requirements

1.4.1   Repository Database Prerequisites

All the version and configuration information managed by Roundtable resides in an OpenEdge database. This database can reside on any certified OpenEdge 11.x or 12.x platform, and you must have an appropriate OpenEdge database license.

The performance of the repository database has a direct impact on the performance of Roundtable. It should be run on the fastest server available in your environment. Standard performance tuning rules apply. The size of the

Roundtable repository database is affected by several factors, and it will grow over time, so you should make sure that the server computer has sufficient disk space.

NOTE: OpenEdge DataServer databases **cannot** be used as the Roundtable repository.

1.4.2   Client Prerequisites

You must have one of the following licenses on each computer where the Roundtable standard GUI client or Roundtable plug-in will run:

- OpenEdge Studio 11.7 or later
- Progress Developers Studio for OpenEdge 11.7 or later
- OpenEdge 4GL Development System 11.7 or later

1.4.3   Server Prerequisites

You must have one of the following OpenEdge licenses on the computer where the Roundtable server will run:

- AppServer 11.7 or later
- PASOE 11.7 or later

The performance of the AppServer has a direct impact on the performance of Roundtable. It should be run on the fastest server available in your environment. For best performance, the repository database and AppServer should reside on the same computer when possible.

NOTE: An AppServer running the Roundtable server software is required if you will be using the Roundtable plug-in client.

1.4.4   Security

Permissions for the Roundtable Workspace directories and files managed by Roundtable are determined by the privileges of users running Roundtable. For the Roundtable server, this would be the owner of the AppServer broker.

> **IMPORTANT**
> Roundtable users and the AppServer broker owner must have both read and write permissions in the Roundtable Workspace directories so that permission errors are not encountered.

2   Installation

2.1   Introduction
Installing Roundtable TSMS involves the processes below:

1. Preparing the repository database.
2. Installing the Roundtable software.
3. Performing Setup and Update.
4. Updating the client shortcut on client workstations.
5. Setting up an AppServer (optional).

Each process is detailed in the sections that follow.

2.2   Preparing the Repository Database

2.2.1   Introduction
For most installations, the Roundtable repository database is set up as a server on the network so that multiple client workstations or multiple AppServer server agents can connect to it. If you are installing Roundtable for the first time, you should create an empty repository database and start a server on it before running the 'Roundtable Setup and Update' procedure.

You can create and run Roundtable against a local Roundtable repository database on your Windows client. However, it is unusual to use Roundtable in this manner because the database cannot be accessed by more than a single client.

NOTE: If you do not create a repository database at this time, you will have the opportunity to create a database during the 'Roundtable Setup and Update' procedure.

2.2.2   Setting Up a Database Server
Follow these steps to set up the Roundtable repository database server:

1. Create an empty database named rtb.db on the server computer. *See the OpenEdge documentation if you are not familiar with creating a database.*
2. Associate a word-break table with the repository database using the proutil command. The syntax for associating a word-break table is:
   > proutil *database* -C word-rules *rule-num*

   where *database* is the name of the database, and *rule-num* is the value of a rule-num for a compiled word-break table. To associate the database with the default word-break rules for the current code page, set rule-num to zero. *See the OpenEdge documentation if you are not familiar with word-break tables.*
3. Start a database server for the Roundtable repository*. See the OpenEdge documentation if you are not familiar with starting a database server.*

2.2.3   Using an OpenEdge 11.x Repository Database
To facilitate concurrent OpenEdge 11.x and OpenEdge 12.x development, you may use an OpenEdge 11.x database for the Roundtable repository. Using an OpenEdge 11.x database for the Roundtable repository allows Roundtable 12.3 software running under OpenEdge 11.x or OpenEdge 12.x to share a single repository as both OpenEdge 11.x and OpenEdge 12.x client can connect to an OpenEdge 11.x database.

> **IMPORTANT**
> An OpenEdge 12.x client cannot update the metaschema of an OpenEdge 11.x database. Consequently, there are special setup instructions (noted in section 2.4 "Performing Setup and Update" below) for updating 11.x repository database schema.

2.3   Installing the Roundtable Software

2.3.1   Introduction
If you will be using Roundtable in a client/server configuration, follow the Full Installation instructions below.

If you will be running Roundtable in a stateless AppServer or PASOE configuration using the standard GUI client, follow **both** the Full Installation and the Server Installation instructions below.

If you will be using the Roundtable plug-in only, follow the Server Installation instructions below. The plug-in installation instructions are detailed in section 4 *"Roundtable Plug-in for Progress Developers Studio"*.

NOTE: When selecting an installation directory, be sure to choose a directory separate from any previous installation of Roundtable.

2.3.2   Full Installation
The full installation will install both the Roundtable client and server files.

Follow these steps to install the Roundtable software:

1. Run the installation package called **12.3-win.exe**. You are presented with two types of installation: Full Installation and Server Installation.
2. Select Full Installation and click Next.
3. Follow the on-screen instructions to install the software into an empty folder.
4. Perform the Roundtable Setup and Update detailed below.

2.3.3   Server Installation
The Server installation installs the files necessary to run the Roundtable server. You should only perform this step if you will be using Roundtable in a stateless AppServer or PASOE environment on a separate server computer.

2.3.3.1   *Windows*
Follow these steps to install the Roundtable Server software on a Windows platform:

1. Run the installation package called **12.3-win.exe**. You are presented with two types of installation: Full Installation and Server Installation.
2. Select Server Installation and click Next.
3. Follow the on-screen instructions to install the software into an empty folder.
4. Perform the Roundtable Setup and Update detailed below.

2.3.3.2   *Unix/Linux*
Follow these steps to install the Roundtable Server software on a Unix/Linux platform:

1. Extract the archive file **12.3-server.tar** into an empty directory that will be used for your Roundtable installation.

2. Perform the Roundtable Setup and Update detailed below.

2.4　Performing Setup and Update

The 'Roundtable Setup and Update' procedure is used to update the Roundtable repository schema and compile the software. This is a wizard-style setup that presents you with a series of instruction pages that lead you though each step of the process.

> **IMPORTANT**
> If you are updating from an earlier version of Roundtable, please first review the section titled "Updating from Earlier versions of Roundtable" below before running the 'Roundtable Setup and Update' wizard.

Follow these steps to run the 'Roundtable Setup and Update' wizard.

1. Launch the 'Roundtable Setup and Update' wizard.

    - On Windows, use the corresponding Start Menu shortcut created by the installation process.
    - On Unix/Linux, from the directory where you installed Roundtable, run the Setup and Update procedure as shown below:
        ```
        # pro -p _update.w -inp 8192
        ```

2. On the Welcome Page of the wizard, click Next.
3. Unless you are creating a new local database, choose to update the schema of an existing database, and click Next. If the repository schema is already at Roundtable release level 1200 and you simply wish to compile the software, choose to skip the schema update and then click Next.
4. Follow the on-screen directions to perform the schema update and/or compile the software.

NOTE: If the Roundtable repository database is an OpenEdge 11.x database, you must start the 'Roundtable Setup and Update' wizard using OpenEdge 11.x. After the schema updates are complete, if you wish to compile the Roundtable software using OpenEdge 11.x, continue the wizard. If you wish to compile the Roundtable software using OpenEdge 12.x, you must cancel the wizard after the schema update is complete and restart the 'Roundtable Setup and Update' wizard using OpenEdge 12.x, skipping the schema update and proceeding directly to the compilation page.

NOTE: For performance purposes, you may want to consider running the schema update portion of the 'Roundtable Setup and Update' procedure directly on the machine hosting the Roundtable repository database.

2.5　Updating the Client Shortcut

The Roundtable TSMS shortcut that is created by the Full Installation process on Windows workstations is not ready to run. You must first change the database connection parameters as appropriate for your installation.

- If running client/server, modify the database connection parameters so that your Roundtable repository database is connected when you launch Roundtable.
- If running via stateless AppServer or PASOE, make sure that the shortcut does **not** connect to the Roundtable repository, since database access is managed by the server partition.

2.6   Creating an AppServer

If you will be using Roundtable in an application server environment, you must set up an OpenEdge AppServer or PASOE server. It is recommended that you use the OpenEdge Explorer included with your OpenEdge installation to configure.

Configuration for traditional AppServer and PASOE are slightly different. In general, the AppServer should be configured as follows:

Operating Mode	Stateless (traditional AppServer)
Server startup parameters	-db *rtb-db* –ld rtb -H *db-host* -S *db-service* -N tcp –rereadnolock -mmax 10000 -D 200
PROPATH	*rtb-install-folder*;*rtb-install-folder/*rtb/proxy/p;<DEFAULT PROPATH> **NOTE**: Be sure to use the PROPATH delimiter appropriate for the AppServer platform (semicolon on Windows computers, colon on Unix/Linux computers). Be sure to place the Roundtable entries at the front of the default PROPATH represented by <DEFAULT PROPATH> above.

rtb-db is the physical filename of the Roundtable repository database.
db-host is the hostname or IP address of the Roundtable repository database server.
db-service is the service name or port number of the Roundtable database server.
rtb-install-folder is the location of the Roundtable installation.

See the OpenEdge documentation if you are not familiar with configuring an AppServer or PASOE server.

NOTE: The parameters described here are the simplest necessary parameters and do not take into account any additional parameters needed for performance-tuning on your system.

> **IMPORTANT**
> Permissions for both the Roundtable programs and the folders and files managed by Roundtable are determined by the privileges of the owner of the AppServer broker. The owner of the AppServer broker must have the ability to both read and write files in these directories.

NOTE: If your Roundtable server is running on Unix/Linux, please note the following:

- The permissions for the shell scripts located in **<install directory>/rtb/script** must be executable for the owner of the AppServer broker process. Adjust these accordingly.
- By default, Roundtable utilizes gzip compression. Copy the **gzip** executable from your operating system installation into a directory named **gzip** under the Roundtable server installation directory.

2.6.1   Configuring the Client AppServer Partition

Each client **must** modify the "roundtable" AppServer partition definition file that was created during the Roundtable installation when running via AppServer using the standard GUI client. The partition definition file, **appsrvtt.d**, is located in the Roundtable installation root directory and contains the AppServer connection information.

The default partition file looks like this for a client-server connection:

"roundtable" "" "" no "" "roundtable" "A" ""

This file can be modified manually or by using the Service Parameter Maintenance tool on the OpenEdge PRO*Tools toolbar. Modify the parameters for the "roundtable" partition as necessary to connect to the AppServer partition configured above by specifying the **Host** and **NameServer** ports on which the Roundtable AppServer is running.

A modified partition file may look like the following for a traditional AppServer connection:

"roundtable" "server_host" "5162" yes no "" "roundtable" "A" "" ""

roundtable is the partition id.
server_host is the name (or IP address) of the server hosting the AppServer.
5162 is the port on which the OpenEdge NameServer is running.
yes indicates that this is a remote partition.
roundtable is the name of the AppServer.

A partition modified for a PASOE connection may look like the following:

"roundtable" "" "" yes no "" "" "A" "http://wintest:8810/apsv" ""

roundtable is the partition id.
yes indicates that this is a remote partition.
http://host:port/apsv is the URL and transport of the PASOE instance.

NOTE: It is a best-practice to move the **appsrvtt.d** file from the Roundtable installation root directory to the 'Start-in' directory of your Roundtable short-cut.

3 Updating from Earlier Versions

3.1 Back up Your Repository

It is recommended that you back up your existing Roundtable repository database before beginning the Roundtable 12.3 upgrade. Care has been taken to ensure that the upgrade process goes smoothly and without error. However, the unexpected can always occur and it may be necessary to revert to your backup under some failure conditions.

3.2 Updating from 12.2

Follow these steps to update a Roundtable 12.2 repository:

1. Run the Setup and Update procedure as described above.
2. When you reach the page entitled "Edit the Contents of the Database Parameters File for Schema Update", please ensure that the #release line is #release=1220. This allows the schema update process to recognize this as an incremental update of the repository schema. Once the schema has been updated, the #release line will be updated to #release=1230 to reflect the new schema level of the repository.

3.3 Updating from 12.0 and 12.1

Follow these steps to update a Roundtable 12.0 repository:

3. Run the Setup and Update procedure as described above.
4. When you reach the page entitled "Edit the Contents of the Database Parameters File for Schema Update", please ensure that the #release line is #release=1200. This allows the schema update process to recognize this as an incremental update of the repository schema. Once the schema has been updated, the #release line will be updated to #release=1230 to reflect the new schema level of the repository.

Click Next to continue with the setup, compiling the Roundtable program files.

3.4 Updating from 11.8

Follow these steps to update a Roundtable 11.8 repository:

5. Run the Setup and Update procedure as described above.
6. When you reach the page entitled "Edit the Contents of the Database Parameters File for Schema Update", please ensure that the #release line is #release=1180. This allows the schema update process to recognize this as an incremental update of the repository schema. Once the schema has been updated, the #release line will be updated to #release=1230 to reflect the new schema level of the repository.

Click Next to continue with the setup, compiling the Roundtable program files.

3.5 Updating from 11.7

Follow these steps to update a Roundtable 11.7 repository:

7. Run the Setup and Update procedure as described above.
8. When you reach the page entitled "Edit the Contents of the Database Parameters File for Schema Update", please ensure that the #release line is #release=1170. This allows the schema update process to recognize this as an incremental update of the repository schema. Once the schema has been updated, the #release line will be updated to #release=1230 to reflect the new schema level of the repository.

Click Next to continue with the setup, compiling the Roundtable program files.

3.6   Updating from Versions Earlier than 11.7

3.6.1   Schema Update

Updating to Roundtable 12.3 from versions prior to 11.7 is a two-step process. The Roundtable repository schema must first be updated to the 1170 release level before updating to the 1230 release level. Please note this additional step in the instructions below.

3.6.2   Schema Update Performance Considerations

When upgrading from prior releases, several tables will have contents dumped and/or initial values set for new fields during the schema update process. Because of this additional processing, **the schema update portion of the installation can be a lengthy process.** Please be patient during the pre-schema update and post-schema update processing phases of the schema update and allow these to finish running.

Because of the large number of records being updated, you may want to consider using the -i parameter when specifying the connection parameters for the Roundtable repository database. Using this parameter can significantly decrease the amount of time it takes to apply the schema updates and execute the data processing procedures. *See the OpenEdge documentation if you are not familiar with this parameter.*

3.6.3   New Indexes

New indexes have been added to several tables in the Roundtable repository. To improve performance during the installation process, the new indexes will be added as inactive.

IMPORTANT
It will be necessary to rebuild the repository indexes after the installation is complete.

The syntax for rebuilding database indexes is as follows:

> proutil *database* -C idxbuild

See the OpenEdge documentation if you are not familiar with using proutil.

3.6.4   Updating from 11.6

Follow these steps to update a Roundtable 11.6 repository:

1. Run the Setup and Update procedure as described above.
2. When you reach the page entitled "Edit the Contents of the Database Parameters File for Schema Update", please ensure that the #release line is #release=1160.
3. Click Next to continue
4. Once the schema has updated, click the Back button until you return to the page described in step 2 above.
5. The #release line should now read #release=1170 to reflect the new schema level of the repository.
6. Click Next to continue with the setup.

3.6.5   Updating from 11.5

Follow these steps to update a Roundtable 11.5 repository:

1. Run the Setup and Update procedure as described above.
2. When you reach the page entitled "Edit the Contents of the Database Parameters File for Schema Update", please ensure that the #release line is #release=1150.

3. Click Next to continue
4. Once the schema has updated, click the Back button until you return to the page described in step 2 above.
5. The #release line should now read #release=1170 to reflect the new schema level of the repository.
6. Click Next to continue with the setup.

3.6.6   Updating from 11.4

Follow these steps to update a Roundtable 11.4 repository:

1. Run the Setup and Update procedure as described above.
2. When you reach the page entitled "Edit the Contents of the Database Parameters File for Schema Update", please ensure that the #release line is #release=1140.
3. Click Next to continue
4. Once the schema has updated, click the Back button until you return to the page described in step 2 above.
5. The #release line should now read #release=1170 to reflect the new schema level of the repository.
6. Click Next to continue with the setup.

3.6.7   Updating from 11.2

Follow these steps to update a Roundtable 11.2 repository:

1. Run the Setup and Update procedure as described above.
2. When you reach the page entitled "Edit the Contents of the Database Parameters File for Schema Update", please ensure that the #release line is #release=1120.
3. Click Next to continue
4. Once the schema has updated, click the Back button until you return to the page described in step 2 above.
5. The #release line should now read #release=1170 to reflect the new schema level of the repository.
6. Click Next to continue with the setup.

3.6.8   Updating from 11.0

Follow these steps to update a Roundtable 11.0 repository:

1. Run the Setup and Update procedure as described above.
2. When you reach the page entitled "Edit the Contents of the Database Parameters File for Schema Update", please ensure that the #release line is #release=1100.
3. Click Next to continue
4. Once the schema has updated, click the Back button until you return to the page described in step 2 above.
5. The #release line should now read #release=1170 to reflect the new schema level of the repository.
6. Click Next to continue with the setup.

3.6.9   Updating from 10.2B

Follow these steps to update a Roundtable 10.2B repository:

1. Run the Setup and Update procedure as described above.
2. When you reach the page entitled "Edit the Contents of the Database Parameters File for Schema Update", please ensure that the #release line is #release=102B
3. Click Next to continue
4. Once the schema has updated, click the Back button until you return to the page described in step 2 above.
5. The #release line should now read #release=1170 to reflect the new schema level of the repository.

6. Click Next to continue with the setup.

3.6.10 Updating from Versions Earlier than Version 10.2B

If your Roundtable repository was created with a version of Roundtable earlier than version 10.2B, then you must contact Roundtable Software technical support directly to get the necessary incremental schema updates.

4 Plug-in for Progress Developers Studio

The Roundtable TSMS plug-in for OpenEdge allows developers using Progress Developer Studio for OpenEdge (PDSOE) access to their Roundtable TSMS repository. The Roundtable TSMS plug-in accesses the repository database via the OpenEdge AppServer or PASOE partition described earlier in this guide.

4.1   Software Requirements

4.1.1   Client

Clients using the Roundtable 12.3 plug-in require the following minimum software components be installed on the client computer:

- Progress Developer Studio 11.7 or 12.x.

4.1.2   Server

The server computer (which may be your local machine) must have the following software installed:

- Roundtable TSMS 12.3 Server running under an OpenEdge AppServer or PASOE server.

4.2   Installing the Roundtable Plug-in

Once the system requirements specified in the previous sections are met, follow the steps below to install the Roundtable plug-in from the Roundtable update site.

1. Launch Progress Developer Studio for OpenEdge.
2. Choose the **Install New Software** option. This is found on the **Help** menu.
3. Add an update site for Roundtable specifying the following URL:
   http://www.roundtable-software.com/roundtable/eclipse/update12
4. Select the **Roundtable TSMS SCM** feature
5. Select the **Roundtable Connector for OpenEdge**.
6. Finish the wizard.

The Roundtable components will be downloaded from update site and automatically installed.

4.3   Configuring the Roundtable Plug-in

After installing the Roundtable plug-in from the update site, please review the 'Getting Started' section of the Roundtable Plug-in User Guide for instructions on using the Plug-in. This guide is installed with the Roundtable plug-in and can be found in the Help Contents section of Progress Developers Studio.

5 Security

The Roundtable installation process creates the 'sysop' user during the initial installation. This user has full privileges to all features and functionality.

The 'sysop' user can create and designate other users as Security Administrators. Security Administrators have full access to security functionality and can designate other users as Security Administrators.

The 'sysop' user can create and designate other users as Administrators. Administrator users have full access to administer the Roundtable application and can designate other users as Administrators.

6 Licensing

Roundtable requires a valid serial number and control code. After installing Roundtable, you will need to enter your serial number and control code before changes can be committed to the repository. This license data can be found on the License Addendum that was included with your software package.

The serial number and control code can be entered from the **Help > About** menu in the GUI client or from the **Repository > Properties** context menu when using the plug-in client.

Please see the End User License Agreement (EULA) that was included with your software package for a complete description and use restrictions.

7 Technical Support

To obtain technical support for Roundtable TSMS, please email Roundtable Technical Support at support@roundtable-software.com in North America, or support-europe@roundtable-software.com in Europe.

For regions other than North America and Europe, contact Progress Software Technical Support.

You can also visit our web site at https://www.roundtable-software.com.