ROUNDTABLE® TSMS 10.2B - Unix

Installation Guide

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1. Installation Planning

1.1 Introduction

Roundtable 10.2B for Unix is a host-based application. The Roundtable repository database is an OpenEdge database that stores information about your application. You will need to identify a database server platform and verify that the platform has enough capacity to accommodate the number of Roundtable clients that will be connecting to the repository.

Roundtable 10.2B should be installed in a directory that is separate from installations of previous Roundtable products. Roundtable 10.2B can be used with existing Roundtable repositories after applying schema updates.

The Roundtable 10.2B Windows client and Roundtable 10.2B Unix character client are compatible and can be used simultaneously against the same repository database.

IMPORTANT: After your Roundtable installation is complete, please visit http://www.roundtable-tsms.com to download any patches that may have been released for Roundtable 10.2B.

1.2 Compatibility

Roundtable 10.2B is compatible with OpenEdge 10.2x releases.

The Roundtable repository can be either an OpenEdge Release 10.x or a Progress Version 9.x database. You will need to use a matching client session to perform the schema update phase of the Setup and Update procedure.

1.3 Requirements

All of the version and configuration information managed by Roundtable resides in an OpenEdge database. This database can reside on any certified OpenEdge 10.x or Progress 9.x platform, and you must have an appropriate OpenEdge/Progress database license. DataServer databases **cannot** be used as the Roundtable repository.

The performance of this database has a direct impact on the performance of Roundtable. It should be run on the fastest server available in your environment. Roundtable presents no special issues regarding the setup or tuning of the database. The size of the Roundtable 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.

1.4 Security

Permissions for the directories and files managed by Roundtable are determined by the privileges of users running Roundtable. It is important that Roundtable users have the ability to **read and write** files in these directories so that Roundtable does not encounter permission errors. The following suggested permissions should be given to Roundtable directories and files:

Permissions	Owner	Group	umask	chmod	Type of file
rwxrwxr-x	0	0	002	0775	Directories
rw-rw-r--	0	0	002	0664	Non-executable files
rwxrwxr-x	0	0	001	0775	Executable files

One simple approach to workspace security is to make all users of Roundtable members of a common group(s) and use a **umask 002** while running Roundtable. This verifies that all files and directories have the proper privileges to allow shared development.

2. Installation and Getting Started

2.1 Installing Roundtable

Follow the instructions in each of the following sections to install Roundtable in a Unix environment.

2.1.1 Loading Roundtable

To install Roundtable on Unix, you must use the root (super user) account for portions of the installation process.

The Unix Roundtable 10.2B program files are distributed electronically or on a Roundtable CD/DVD in the **unix** subdirectory in a tar file named **102b-unix.tar**. If a CD/DVD was provided, mount the Roundtable CD/DVD with the appropriate mount command for your computer. Use **`tar xvf`** to extract the Roundtable program files from the installation media into your new Roundtable directory. For example:

```
# cd /u1/rtb
# tar xvf /mnt/cdrom/unix/102b-unix.tar
```

IMPORTANT: By default, Roundtable utilizes gzip compression. Copy the **gzip** executable from your operating system installation into a directory named **gzip** under the Roundtable installation directory.

2.1.2 Setting Up a Database Server

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

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

Follow these steps to set up the Roundtable repository database server:

1. Create an empty database named rtb.db on the server computer. See "Creating and Deleting Databases" in the *OpenEdge Data Management: Administration* manual.
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, set rule-num to zero. Setting rule-num to zero associates the database with the default word-break rules for the current code page. See "Word-break tables" in the *OpenEdge Development: Internationalizing Applications* manual for more details.
3. Start a database server for the Roundtable repository. See "Startup and Shutdown" in the *OpenEdge Data Management: Administration* manual.

NOTE: The database should be started with a –n 1 parameter during installation so that only a single client can connect during this process. Remove this parameter after the installation is complete.

2.1.3 Using a Progress V9 Repository Database

In order to facilitate concurrent V9 and V10 development, you may use a Progress V9 database for the Roundtable 10.2B repository. Using a Progress V9 database for the Roundtable repository allows both Roundtable V9.x and Roundtable V10.x clients to share a single repository.

IMPORTANT: An OpenEdge 10.x client cannot update the metaschema of a Progress V9 database. Consequently, there are special setup instructions (noted in section 2.1.4 Running the Roundtable Setup and Update Program below) and that Roundtable users in a Progress V9 repository database cannot be maintained using an OpenEdge 10.x client.

2.1.4 Running the Roundtable Setup and Update Program

The ‘Roundtable Setup and Update’ procedure is a wizard style setup that presents you with a series of instruction pages that lead you through each step of the installation process. On some pages you will be required to provide information and on others you will simply choose a button.

IMPORTANT: If you are updating from an earlier version of Roundtable, please read the section “Updating from Earlier Versions of Roundtable” before running the ‘Roundtable Setup and Update’ procedure described in this section.

IMPORTANT: In order to install Roundtable 10.2B against a V9 repository, you must run the schema update portion of the ‘Roundtable Setup and Update’ procedure using a Progress V9 client. Then quit the ‘Setup and Update’ procedure and run the compilation phase of the update (skipping the schema update phase) with an OpenEdge V10 client.

From the directory where you installed Roundtable, start a Progress session and run **_update.w**.

If you installed Roundtable source in a directory called /u1/rtb, and Progress is in your PATH, then enter the following command:

```
# cd /u1/rtb
# pro -p _update.w
```

2.1.5 Creating a Parameters File

The scripts for running Roundtable and starting and stopping its server all look for a Progress parameters file. In the directory where you installed the Roundtable compiled r-code, create and edit a parameters file named `rtb.pf` with a command such as:

```
# vi rtb.pf
```

Edit the parameters file to contain the appropriate database connection parameters for your Roundtable repository. For example:

```
# physical database name
-db /u1/rtb/rtb1.db

# Server options
-ld rtb     # necessary if your database name is not “rtb.db”
-L 10000    # sometimes necessary for loading large schemas.

# Client options
# enter your client options here
```

NOTE: Add any additional database server tuning options applicable for your environment.

2.1.6 Setting Up Roundtable Users

After verifying that the user is a member of the user group(s) allowed to access Roundtable, you can give the user access to the Roundtable application.

Remember to replace **/u1/roundtable** with the actual directory in which Roundtable is installed. Each Roundtable user must have their own `rtbwork` directory. Log in as the user and enter the following commands:

```
$ cd
$ cp /u1/rtb/_rtb .
$ chmod +x  _rtb
$ mkdir rtbwork
$ cd rtbwork
$ vi RTBSETUP
```

Enter these parameters in the RTBSETUP file (on a single line):

```
RTBPATH
"/u1/roundtable,/u1/roundtable/rtb,/u1/roundtable/rtb/p,."
```

The RTBSETUP file allows the user to specify many additional parameters. Please see the "RTBSETUP File Options" section of the Roundtable User's Guide for details on the options that can be set in this file.

NOTES:

- The **_rtb script** contains a **umask 002** command. If this is not appropriate for your installation, change it.
- The **_rtb script** runs the mpro script provided by Progress. If you have not set up the mpro command for your environment, you must do so before running the **_rtb script**. You can replace the mpro command in the **_rtb script** with a direct reference to the _progres command, if required. Make sure that the environment variables required by OpenEdge are set properly if you do this.

2.2 Running Roundtable

If the Roundtable database server is not yet running, then enter the following commands:

```
$ cd /u1/roundtable
$ _server
```

NOTE: If your Roundtable database is on a remote server, then how you start your Roundtable database server will depend on your environment.

From a user's account that is set up for Roundtable, enter the following commands:

```
$ cd
$ _rtb
```

3. Updating from Earlier Versions of Roundtable

3.1 Workspace Schema Update Incompatibility

The Roundtable 10.2B Workspace Schema Update process is incompatible with Workspace Schema Update in versions of Roundtable earlier than 10.1A. Please complete and/or delete any Workspace Schema Update lists **BEFORE** installing Roundtable 10.2B.

3.2 Associating a Word-break Table

If you are updating from a Roundtable version earlier than 10.1B, you will need to associate a word-break table with the repository database before applying the Roundtable 10.2B schema. Please refer to the section "Setting Up a Database Server" for details.

3.3 Updating from Version 10.1C

Follow these steps to update a Roundtable 10.1C repository:

1. Install Roundtable into a new directory, following the instructions in "*Installing Roundtable"* above.

2. Run **_update.w** and when you reach the "Edit the content of the parameters file" page, you must make sure the `#release` line is `#release=101c`. This allows the schema update process to recognize this as an incremental update of the repository schema. `_update.w` changes your `#release` line to `#release=102b` once your schema has been updated.
3. Continue with setup, compiling the Roundtable program files.

3.4 Updating from Version 10.1B

Follow these steps to update a Roundtable 10.1B repository:

1. Install Roundtable into a new directory, following the instructions in "*Installing Roundtable"* above.

2. Run **_update.w** and when you reach the "Edit the content of the parameters file" page, you must make sure the `#release` line is `#release=101b`. This allows the schema update process to recognize this as an incremental update of the repository schema. `_update.w` changes your `#release` line to `#release=102b` once your schema has been updated.

3. Continue with setup, compiling the Roundtable program files.

3.5 Updating from Version 10.1A

Follow these steps to update a Roundtable 10.1A repository:

1. Install Roundtable into a new directory, following the instructions in "*Installing Roundtable"* above.

2. Run **_update.w** and when you reach the "Edit the content of the parameters file" page, you must make sure the `#release` line is `#release=101a`. This allows the schema update process to recognize

this as an incremental update of the repository schema. `_update.w` changes your `#release` line to `#release=102b` once your schema has been updated.

3. Continue with setup, compiling the Roundtable program files.

3.6 Updating from Version 10.0A

Follow these steps to update a Roundtable 10.0A repository:

1. Install Roundtable into a new directory, following the instructions in the previous section "*Installing Roundtable"*.

2. Run **_update.w** and when the "Edit the content of the parameters file" page appears, you must make sure the `#release` line is `#release=10a1`. This allows the schema update process to recognize this as an incremental update of the repository schema. `_update.w` changes your `#release` line to `#release=102b` once your schema has been updated.

3. Continue with the setup, compiling the Roundtable program files.

3.7 Updating from Version 9.1D

Follow these steps to update a Roundtable 9.1D repository:

1. Install Roundtable into a new directory, following the instructions in the previous section "*Installing Roundtable"*.

2. Run **_update.w** and when the "Edit the content of the parameters file" page appears, you must make sure the `#release` line is `#release=91d1`. This allows the schema update process to recognize this as an incremental update of the repository schema. `_update.w` changes your `#release` line to `#release=102b` once your schema has been updated.

3. Continue with the setup, compiling the Roundtable program files.

3.8 Updating from Versions Earlier than Version 9.1D

If your Roundtable repository was created with a version of Roundtable earlier than version 9.1D, then you must contact Tugboat Software directly to get the necessary incremental schema updates. Please email Roundtable Technical Support at support@roundtable-tsms.com in USA and North America or support-europe@roundtable-tsms.com in Europe.

4. Roundtable Licensing

Roundtable requires a serial number and a set of control numbers. The serial number and the control number are stored in the Roundtable repository database. User connections are tracked in the Roundtable repository. Each user that runs Roundtable and connects to the repository (client/server or host-mode) counts as one user. Only the number of users for which you are licensed can concurrently run Roundtable and connect to the repository database.

4.1 Adding License Information for the First Time

The first time that you run Roundtable after a new installation or after an update, you will be prompted for a serial number and a control number. These can be found on the License Addendum that was included with your software package.

4.2 Viewing Your License Information

You can view your current license information at any time. From the Main Menu, choose Admin. If security has been enabled then enter the sysop password, and choose License Information. This will display your serial number, your user limit, and your expiry date (used for evaluation licenses only). You must submit your serial number and company name when contacting Roundtable Technical Support.

4.3 Editing Your License Information

You can update your license information at any time. From the Main Menu, choose Admin. If security has been enabled then enter the sysop password. Choose License Information, and then choose the Update License button. This allows you to enter a new license number and a new control number. For example, you would use this menu item to update your license information if you received a new license allowing more concurrent Roundtable users.

5. Technical Support

To obtain technical support for Roundtable TSMS 10.2B, please email Roundtable Technical Support at support@roundtable-tsms.com in North America, or support-europe@roundtable-tsms.com in Europe. For regions other than North America and Europe, contact Progress Software Technical Support.