ROUNDTABLE® TSMS v10.0A - Character

Install Notes

Contents

1. Installation Planning

1.1 Introduction

Roundtable v10.0A for Unix is a host-based application. The Roundtable repository database is an OpenEdge database that contains information about your application, and can be managed with your existing OpenEdge database utilities. You will need to identify a database server platform and ensure that the platform has enough capacity to handle the needs of the Roundtable clients that will be connecting to the repository.

Roundtable v10.0A is a new product, and should be installed in a directory that is separate from installations of previous Roundtable products. Although Roundtable v10.0A is a new product, it can be used with existing Roundtable repositories after applying schema updates.

The Roundtable v10.0A graphical client and Roundtable v10.0A Unix character client are compatible and can be used simultaneously against the same repository database.

1.2 Roundtable Version 9.1D and OpenEdge

Roundtable v10.0A is compatible with OpenEdge Release 10.0A.

Roundtable clients can run against a local database or database servers located on different platforms.

The Roundtable repository can be either a OpenEdge 10.0A or Progress Version 9.x database.   However, only an OpenEdge 10.0A client can update OpenEdge 10.0A database schema.

1.3 Requirements

The Roundtable encrypted source and compiled files require approximately 20MB of disk space. The Roundtable repository database varies in size depending on the number of files and programs defined in your system.

The performance of the repository database has a direct impact on the performance of Roundtable when managing your applications. It should be run on the fastest server available in your environment. Roundtable presents no special issues regarding the setup or tuning of the OpenEdge database. The Roundtable database might grow as large as 200MB for medium-sized development shops, or 1GB or more for large development shops.

1.4 Unix File Security

File and directory permissions in the workspaces 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 workspaces so that Roundtable does not encounter errors while trying to manipulate files in the workspace. 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 ensures that all files and directories have the proper privileges to allow shared development.

1.4.1 Groups in System V versus BSD Unix

User groups are handled differently in System V and in BSD variants of Unix. In most System V variants, the user can only belong to one user group at a time. In BSD, the user belongs to one or more groups simultaneously.

In System V the user can change to different groups using the **newgrp** command. Many BSD variants do not include the **newgrp** command because it is not required. The user's primary group is identified in the /etc/passwd file in both systems.

If you have a System V variant, make sure that shell scripts that get the users into Roundtable put the user into a shared group using **newgrp**. You can also make all Roundtable users members of the same group to avoid problems when users copy files into a workspace without running Roundtable first.

If you have a BSD variant or an enhanced System V variant that supports membership in multiple groups, make sure that all Roundtable users share the same primary group.

1.4.2 Alternative Security Techniques

Unix experts can probably think of many other ways to implement security for Roundtable. You can try other techniques, but remember that it is dangerous to refuse an application like Roundtable access to the files and directories it manages. Although every precaution has been taken to handle such refusals gracefully, it cannot be guaranteed that every situation will not result in data loss or other difficulties for the Roundtable user if other security strategies are used.

2. Installation and Getting Started

2.1 Installing Roundtable
Follow the instructions in each of the sections below to install Roundtable in a Unix environment.

2.1.1 Loading Roundtable

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

Create a directory for Roundtable. This directory should have at least 20MB free for application code and enough space for the Roundtable database. The size of the Roundtable database varies greatly depending on the size of your application and the number of workspaces managed by Roundtable.

The Unix Roundtable v10.0A program files are distributed on CD-ROM in the **unix** subdirectory in a tar file named **100a-unix.tar**. Mount the Roundtable CD with the appropriate mount command for your computer, and then use `tar xvf` to extract the Roundtable program files into your new Roundtable directory. For example:

```
# cd /u1/rtb
# tar xvf /mnt/cdrom/unix/100a-unix.tar
```

2.1.2 Creating a Database and Starting Its Server

If your Roundtable repository database is to reside on a different server, then you must perform the following steps. Otherwise, skip to the next section, "Running the Roundtable _update.w Program".

1. Create a database named rtb.db on the server machine. It must be created from the empty.db database that is provided with Progress on your server machine's platform. See "Creating and Deleting Databases" in the *OpenEdge Data Management: Administration* manual.

2. Configure the server machine so that clients can connect to your new rtb.db database, and start a Progress database server for it. See "Startup and Shutdown" in the *OpenEdge Data Management: Administration* manual.

2.1.3 Using a Progress v9 Repository Database

In order to facilitate mixed v9 and v10 development, you may use a Progress v9 database for the Roundtable 10.0A repository. Using a Progress v9 database for the Roundtable repository allows both Roundtable v9 and Roundtable v10 clients to share a single repository (in a client/server environment).

In order to install Roundtable v10.0A against a v9 repository, you must run the schema update portion of the 'Roundtable Setup and Update' procedure using a Progress v9 client; quit the 'Setup and Update' procedure, then run the compilation phase of the update (skipping the schema update phase) with an OpenEdge 10.0A client.

Please see the section "Updating from Earlier Versions of Roundtable" for further details.

2.1.4 Running the Roundtable Setup and Update Program

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.

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 asked to provide information and on others to simply choose a button.

During the setup you will specify whether you are updating a repository database's schema from empty, updating the schema of an existing Roundtable database, or just compiling new application code.

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
```

2.1.6 Setting Up Roundtable Users

After ensuring 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.

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

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

Edit these parameters in the RTBSETUP file.

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

The RTBSETUP file allows the user to specify many additional parameters. See the "RTBSETUP File Options" section for information on the options that can be set in this file.

NOTES:

- If you are a System V user you might want to modify the **_rtb script** to use **newgrp** to switch the user to the appropriate group prior to running Roundtable.

- The **_rtb script** contains a **umask 002** command. If this is inappropriate 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.

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

```
$ cd /u1/rtb
$ _server
```

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

```
$ cd
$ _rtb
```

2.3 RTBSETUP File Options

The RTBSETUP file is read to set options for the Roundtable environment. All of these options, except RTBPATH, are optional in most environments. Only UNIX-style directory separators (/) in this file.

RTBPATH   This parameter must be supplied. It contains comma-separated path segments, and it is prepended to the Progress PROPATH when the Roundtable system is started. The first segment **must** contain the path to the directory where Roundtable has been **compiled**. The second segment must the same as the first with **/rtb** appended. Likewise for the third with **/rtb/p** appended.

The fourth segment should be a period to allow Progress to find *.p programs in your rtbwork subdirectory. You might want to add additional segments to RTBPATH to allow Progress to find special programs and tools while you are in Roundtable.

For example:

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

EDITOR   The name and parameters for an editor to edit PCODE objects' files. The default editor on UNIX is a modified version of the Progress Procedure Editor. If you want to use an editor like the vi editor, enter a line similar to the following:

```
EDITOR "vi $file"
```

The **$file** token is replaced with the name of the file by Roundtable when Roundtable calls the editor. It is not necessary to make an entry if you want to use the default.

VIEW   The name and parameters for an editor to view PCODE objects' files. The default editor on UNIX is a modified version of the Progress Procedure Editor. If you want to use an editor like the vi editor, enter a line similar to the following:

```
VIEW "vi $file"
```

The **$file** token is replaced with the name of the file by Roundtable when Roundtable calls the editor. It is not necessary to make an entry if you want to use the default.

DOCEDITOR   The name and parameters for an editor to edit DOC objects' files. The default editor is the Progress procedure editor. If you want to use an editor like the vi editor, enter a line similar to the following:

```
DOCEDITOR "vi $file"
```

The **$file** token is replaced with the name of the file by Roundtable when Roundtable calls the editor. It is not necessary to make an entry if you want to use the default.

DOCVIEW The name and parameters for an editor to view DOC objects' files. The default editor on UNIX is a modified version of the Progress Procedure Editor. If you want to use an editor like the vi editor, enter a line similar to the following:

```
VIEW "view $file"
```

The **$file** token is replaced with the name of the file by Roundtable when Roundtable calls the editor. It is not necessary to make an entry if you want to use the default.

SILENT This parameter requests that Roundtable call your editor and viewer programs with the OS-COMMAND SILENT command in Progress. This is necessary in some environments to prevent the "press spacebar to continue" message from appearing after every file edit.

MAINMENU This option allows you to add options to the main menu of the Roundtable application. Each option is entered as a pair of comma-separated values with the form "**,menuitem,program.**"

As an example, the Progress **help.p** program is shown added to the Roundtable main menu with **"Help,/home/dlc/help.p."** Note the full path specification for the help program. Adding another menu option might appear as shown below:

```
MAINMENU "Help,/home/dlc/help.p,MY PROGRAM,./mystuff.p."
```

Note that you do not have to use the program's full path specification if it is available in the PROPATH.

PRINTDEST This parameter allows you to specify the default print destination. Your choices are: P, F, T (Printer, File, Terminal).

PRINTOPT This parameter allows you to specify options for the print destination. This option is only effective on UNIX. It has different meanings depending on the print destination as shown in the following examples:

Printer:	**"lp $file"**	Roundtable supplies $file at the time of printing.
File:	**"myfile"**	Default name of output file.
Terminal:	**"wyse60w"**	Name of a terminal mode to use for output display.

PRINTPGLN This parameter allows you to specify the page length.

You can have multiple PRINTDEST/PRINTOPT/PRINTPGLN commands in your file to set the defaults for each possible destination. Make sure that the destination that you want as a default is the last destination specified. For example, the following sequence sets up each print destination with the Printer as the last output device specified and therefore the default:

```
PRINTDEST  "T"
PRINTOPT   "wyse60w"
PRINTPGLN 0
PRINTDEST  "F"
PRINTPGLN 55
PRINTDEST  "P"
PRINTOPT "lp -ow -pjoeslocal $file"
PRINTPGLN 55
```

Please note that these option values are probably not useful on your system.

In addition to the PRINT* options above, which are used for Roundtable reports, the CODEPRINT and DOCPRINT options that follow allow you to control the printing of text from Roundtable.

CODEPRINT   This parameter allows you to specify how Roundtable prints source files associated with PCODE objects in a workspace. This option is only effective on UNIX. This is often a different command than that specified for the printer destination in the previous parameters. For example, the following produces printed source listings with line numbers on a SUN system:

```
CODEPRINT "cat $file | nl -ba | lp -s"
```

DOCPRINT   This parameter allows you to specify how Roundtable prints source files associated with DOC objects in a workspace. This option is only effective on UNIX.

```
DOCPRINT "lp -s $file"
```

DIFF   This parameter allows you to specify the default OS command to use in the source compare utility.

```
DIFF "diff"
```

FIELDSORT   This option allows you to specify the default sort sequence used to display fields assigned to PFILE objects. For example, you could enter the following specification to have Roundtable display the fields in Fieldname order:

```
FIELDSORT "Fieldname"
```

TEMPDIR	This option allows you to specify a temporary directory other than the default. This would, for example, allow you to force all of your users to share a common directory. This is not recommended but has been a requirement at some sites. It is also possible to insert a $user token in this path that is resolved by Roundtable to the user's login name. If you use this feature you must ensure that your user names have no invalid characters for directory creation.
MACHINE	This option is used when you have enabled Network Mapping for the Roundtable system. The token is followed by a quoted string with a unique name for the workstation.

3. Updating from Earlier Versions of Roundtable

3.1 Updating from Version 9.1D

There are repository schema changes for v10.0A. Follow these steps to update a Roundtable v9.1D repository:

1. Install Roundtable into a new directory, following the instructions in "*Installing Roundtable*" above.
2. Run **_update.w** and when you reach the page entitled "Edit the content of the parameters file", you must make sure the `#release` line is `#release=91D1`. This allows the schema update process to recognize this an incremental update of the repository schema. `_update.w` changes your `#release` line to `#release=10A1` once your schema has been updated.
3. Continue with setup, compiling the Roundtable program files.

3.2 Updating from Version 9.1C

There are repository schema changes for v10.0A. Follow these steps to update a Roundtable v9.1C repository:

1. Install Roundtable into a new directory, following the instructions in "*Installing Roundtable*" above.
2. Run **_update.w** and when you reach the page entitled "Edit the content of the parameters file," you must make sure the `#release` line is `#release=91C1`. This allows the schema update process to recognize this an incremental update of the repository schema. `_update.w` changes your `#release` line to `#release=10A1` once your schema has been updated.
3. Continue with the setup, compiling the Roundtable program files.

3.3 Updating from Versions Earlier than Version 9.1C

If your Roundtable repository was created with a version of Roundtable earlier than version 9.1C, 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 set of control numbers. The serial number and 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 fresh 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 then choose License Information. This will display your serial number, your user limit, and your expiry date (used for evaluation licenses only). You will need to 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, and then 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 to allow you to have more concurrent Roundtable users.