
ROUNDTABLE® TSMS 10.2B - Windows

Installation Guide

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1. Installation Planning

1.1 Introduction

Roundtable 10.2B for Windows can be run as a client/server application, or in a distributed environment, with the server division on an OpenEdge AppServer partition.

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 the 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, as detailed later in this document.

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

1.3.1 Repository Database Prerequisites

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.

1.3.2 Client Prerequisites

You must have one of the following licenses on each computer where the Roundtable Windows client will run:

- OpenEdge Studio 10.2A or later
- 4GL Development System 10.2A or later

You must also have a Client Networking license for each client workstation (unless you plan to run the Roundtable client against a single-user database).

Roundtable has been tested in the following Windows environments:

- Windows Server 2003
- Windows XP
- Windows Vista

1.3.3 Server Prerequisites (Distributed mode only)

If you plan to run Roundtable in distributed mode, you must have an appropriate OpenEdge 10.2A or later AppServer and NameServer licenses. 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. Typically, for best performance, the repository database and AppServer reside on the same computer. For database prerequisites, please see the previous section *Repository Database Prerequisites*.

1.4 Security

Permissions for the folder and files managed by Roundtable are determined by the privileges of users running Roundtable and the owner of the AppServer broker (when running in a distributed setup). It is important that Roundtable users and the owner of the AppServer broker have the ability to both **read and write** files in these folders so that Roundtable does not encounter permission errors.

2. Installing Roundtable

2.1 Introduction

Installing Roundtable involves these five processes:

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 partition (distributed mode only).

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 the repository (empty) database and start a server on it before running the 'Roundtable Setup and Update' procedure on the client workstation.

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 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 "Creating and Deleting Databases" in the *OpenEdge Data Management: Administration* manual for more details.

NOTE: The repository database should not be created within the OpenEdge directory structure because OpenEdge might delete this directory during a future installation.

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 server 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.

2.2.3 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 2.4 Performing Setup and Update below) and that Roundtable users in a Progress V9 repository database cannot be maintained using an OpenEdge 10.x client.

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 distributed (AppServer) configuration, follow **both** the Full Installation and the Server Installation instructions below.

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. Insert the CD/DVD into the appropriate drive (if a physical disc was provided), or uncompress the downloaded installation package. If the install program does not start automatically, then run the program called **setup.exe** in the **Win** folder of the installation media. 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 will only install the files necessary to run the Roundtable server and should only be performed if you will be using Roundtable in a distributed environment.

Choose the appropriate installation for your AppServer license.

2.3.3.1 Windows

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

1. Insert the CD/DVD into the appropriate drive (if a physical disc was provided), or uncompress the download installation package. If the install program does not start automatically, then run the program called **setup.exe** in the **Win** folder of the installation media. 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. Mount the CD/DVD (if provided).
2. Copy the archive file **102b-server.tar** from the **Unix** folder of the installation media.
3. Extract the copied archive file to an empty directory.
4. Perform the Roundtable Setup and Update detailed below.

2.4 Performing Setup and Update

Before you can run Roundtable you must run the 'Roundtable Setup and Update' procedure to update the Roundtable repository schema and compile the application files.

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 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 refer to the section "Updating from Earlier versions of Roundtable" before running the 'Roundtable Setup and Update.'

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 10.2x client.

2.4.1 Windows

Follow these steps to perform the Setup and Update procedure on Windows (Full and Server) installations:

1. Launch the 'Roundtable Setup and Update' procedure using the corresponding Start Menu shortcut created by the installation procedure above.
2. On the welcome page, click Next.
3. Unless you are creating a new local database, choose to update the schema of an existing database, and click Next.
4. Follow the on-screen directions to perform the schema update and to compile the software.

2.4.2 Unix/Linux

Follow these steps to complete the setup of the Roundtable Server on a Unix/Linux platform:

1. From the directory where you installed Roundtable, start a Progress session and run the Setup and Update procedure `_update.w` as shown below.

For example, if you installed Roundtable source in a directory called `/u1/rtb`, and the OpenEdge **bin** directory is in your PATH, and then enter the following commands:

```
# cd /u1/rtb
# pro -p _update.w -inp 8192
```

2. On the welcome page of the setup wizard, click Next.
3. If the repository schema was updated in an earlier step, then choose the option to skip the schema update, and click Next.
4. Follow the on-screen directions to compile the software. Make sure that the **compile.pf** file connects to the repository updated by the Full Installation.
5. The permissions for the shell scripts located in **<install directory>/rtb/script** (where **<install directory>** is the directory in Step 1 above) must be executable for the owner of the AppServer broker process. Adjust these accordingly.
6. 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.

2.5 Updating the Roundtable Shortcut (on Client Workstations)

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 in distributed mode, make sure that the shortcut does **not** connect to the Roundtable repository, since database access is managed by the server partition.

2.6 Setting Up an AppServer Partition

2.6.1 Configuring the AppServer Partition

If you will be using Roundtable in a distributed environment, and/or using the Roundtable plug-in for OpenEdge Architect, you must setup an OpenEdge AppServer 10.2x partition. The AppServer agent must connect to the repository database, and contain the Roundtable Server installation directory in its PROPATH, as shown in the following example:

```
Server startup      -db rtb-db -ld rtb -H db-host -S db-service -N tcp -rereadnolock
```

parameters:

PROPATH: `rtb-install-folder;rtb-install-folder\rtb\proxy\p;@{WinChar
Startup\PROPATH};@{WorkPath}`

where

`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 TSMS 1021B Server installation.

NOTE: Be sure to use the PROPATH delimiter appropriate for the AppServer platform (semicolon on Windows computers, colon on Unix/Linux computers).

See the *OpenEdge Application Server: Administration* manual for details on configuring the AppServer.

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.

2.6.2 Configuring Clients (Distributed mode only)

If you will be running Roundtable in distributed (AppServer) mode, you will need to modify the "roundtable" AppServer partition definition file that was created during the Roundtable installation. The partition definition file, `appsrvtt.d`, is located in the Roundtable installation directory and can be modified using the Service Parameter Maintenance PRO*Tool.

Modify the parameters for the "roundtable" partition as necessary to connect the client session to the AppServer partition configured above.

2.7 Copying Client r-code

Each OpenEdge developer should be running a copy of the Roundtable client. You can choose to install a complete copy of the Roundtable system on each client, copy an r-code-only version of the system to each client, or run Roundtable from a network fileserver.

If you have a number of workstations that connect to the same repository, you can copy the Roundtable r-code directory and its contents to those computers rather than install and compile Roundtable on each of them. You will have to create the Roundtable shortcuts manually, or copy them from the computer on which Roundtable was installed.

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. If you are updating from a version 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 Client Installation instructions in the previous section “*Installing the Roundtable Software*”.
2. Run the Setup and Update procedure. When you reach the page entitled “Edit the content of the parameters file”, 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 the setup, compiling the Roundtable program files.

3.4 Updating from Version 10.1B

Follow these steps to update a Roundtable 10.1B repository:

4. Install Roundtable into a new directory, following the Client Installation instructions in the previous section “*Installing the Roundtable Software*”.
5. Run the Setup and Update procedure. When you reach the page entitled “Edit the content of the parameters file”, 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.
6. Continue with the 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 Client Installation instructions in the previous section “*Installing the Roundtable Software*”.
2. Run the Setup and Update procedure. When you reach the page entitled “Edit the content of the parameters file”, 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 the 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 Client Installation instructions in the previous section “*Installing the Roundtable Software*”.
2. Run the Setup and Update procedure. When you reach the page entitled “Edit the content of the parameters file”, 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 Client Installation instructions in the previous section “*Installing the Roundtable Software*”.
2. Run the Setup and Update procedure. 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 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 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 the control number are stored in the Roundtable repository database. User connections are maintained in the Roundtable repository. Each unique user that runs Roundtable and connects to the repository (client/server, AppServer, 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 Editing Your License Information

After installing Roundtable, you will need to enter your serial number and a control number. These can be found on the License Addendum that was included with your software package. Follow these steps to enter license information:

1. Start a Roundtable session, logging in as the **sysop** user.
2. Choose **Help > About** from the Roundtable Tabletop menu. The About Roundtable dialog box appears.
3. Choose the Update Record button to enable the Site Information fields.
4. Fill in the values, and then choose the Save Record button.

You can update your license information at any time. Usually, you would do this if you received a new license to allow you to have more concurrent Roundtable users, or to upgrade an evaluation license.

4.2 Viewing Your License Information

You can view your current license information at any time from the Tabletop. Choose the Help→About from the Roundtable Tabletop menu. The About Roundtable dialog box shows 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.

5. Roundtable Plug-in for OpenEdge Architect

5.1 Software Requirements

5.1.1 Client

Clients using the Roundtable 10.2B plug-in require the following minimum software components be installed on the client computer:

- OpenEdge Architect 10.2B or later
- If running local AppServer, OpenEdge AppServer 10.2A or later.

- If running local AppServer accessing a local Roundtable installation, Roundtable TSMS 10.2B Server or Roundtable TSMS 10.2B Windows (Full Installation).

5.1.2 Server

If the Roundtable plug-in will be connecting to a remote AppServer, the server computer must have the following software installed:

- Roundtable TSMS 10.2B Server
- OpenEdge AppServer 10.2A or later

5.2 Installing the Roundtable Plug-in

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

1. Launch OpenEdge Architect 10.2B.
2. From the main menu, choose **Help > Software Updates...**
3. Select the **Available Software** tab.
4. Click the **Add Site...** button.
5. In the Add Site dialog, enter the Location **<http://www.roundtable-tsms.com/eclipse/update2.0/>**
6. Click **OK**.
7. Expand the newly added site in the software tree.
8. Check the **OE Development 10.2B** item. Optionally, if you want to use the event extensions then check the **OE 10.2x Integration** item.
9. Click the **Install...** button.
10. The installation process should now proceed.

5.3 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 OpenEdge Architect.

6. 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.