ROUNDTABLE® TSMS 11.0
Installation Guide

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1.1   Introduction

Welcome to Roundtable! This installation document will guide you through the process of installing Roundtable TSMS 11.0. Please read it completely before beginning your installation.

1.2   General

Roundtable TSMS 11.0 can be run as a client-server application or in a distributed environment with the Roundtable server running on an OpenEdge AppServer. Depending on your requirements, you may configure both types of installations.

The Roundtable 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 11.0 should be installed in a directory that is separate from installations of previous Roundtable products. Roundtable 11.0 can be used with existing Roundtable repositories after applying schema updates, as detailed later in this document.

After your Roundtable installation is complete, please visit **www.roundtable-tsms.com** to download any patches that may have been released for Roundtable 11.0.

1.3   Compatibility

Roundtable 11.0 is compatible with OpenEdge 11.x and OpenEdge 10.2B. The Roundtable repository database can be either an OpenEdge 11.x or an OpenEdge 10.x database.

IMPORTANT: Due to core schema changes in the Roundtable repository**, prior versions of Roundtable are not compatible with repositories that have been upgraded to Roundtable 11**. It is recommended that you maintain a separate repository if you must continue development using OpenEdge versions prior to 10.2B and require the use of older Roundtable software.

1.4   Requirements

1.4.1   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 11.x or 10.x platform, and you must have an appropriate OpenEdge database license. Your Roundtable repository database can be backed-up and maintained just like any other OpenEdge database in your organization.

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. 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.

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 10.2B or later
- OpenEdge Architect 10.2B
- OpenEdge 4GL Development System 10.2B or later
- Progress Developer Studio for OpenEdge 11

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.

1.4.3 Server Prerequisites

If you plan to run Roundtable in distributed mode, you must have an appropriate OpenEdge 10.2B or later AppServer license to run the Roundtable server software.

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 if possible.

NOTE: A Roundtable server is required if you will be using the Roundtable plug-in client for OpenEdge.

1.5 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. 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 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 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 "Creating and Deleting Databases" in the *OpenEdge Data Management: Database Administration* manual for more details.
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 "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: Database 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 for client-server connections.

2.2.3   Using an OpenEdge 10.x Repository Database
In order to facilitate concurrent OpenEdge 10.2B and OpenEdge 11 development, you may use an OpenEdge 10.x database for the Roundtable 11.0 repository. Using an OpenEdge 10.x database for the Roundtable repository allows Roundtable 11.0 software running under OpenEdge 10.2B or OpenEdge 11.0 to share a single repository as both OpenEdge 10.2B and OpenEdge 11 client can connect to an OpenEdge 10.x database.

IMPORTANT: An OpenEdge 11.x client cannot update the metaschema of an OpenEdge 10.x database. Consequently, there are special setup instructions (noted in section 2.4 Performing Setup and Update below) for updating the 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 distributed AppServer 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 5 Roundtable Plug-in.

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 downloaded installation package called **11-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 only installs the files necessary to run the Roundtable server and should only be performed if you will be using Roundtable in a distributed environment and a separate server computer.

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. Run the downloaded installation package called **11-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.

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 **11-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
Before you can run Roundtable, you must run the 'Roundtable Setup and Update' procedure to update the Roundtable repository schema and compile software. This procedure 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" 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 schema has already been updated to Roundtable 11 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 10.x database, be sure to start the 'Roundtable Setup and Update' wizard using OpenEdge 10.2B. After the schema updates are complete, if you wish to compile the Roundtable software using OpenEdge 10.2B, continue the wizard. If you wish to compile the Roundtable software using OpenEdge 11, you must cancel the wizard after the schema update is complete and restart the 'Roundtable Setup and Update' wizard using OpenEdge 11, skipping the schema update and proceeding directly to the compilation page.

NOTE: If this is a new installation and you created your empty Roundtable repository database with a structure file and specific areas, you can assign Roundtable tables and indexes to those areas using the 'DB Areas' button on the 'Update Database Schema' wizard page.

2.5   Updating the Roundtable Shortcut on 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   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 a **stateless** OpenEdge 11.x or OpenEdge 10.2B AppServer 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:

Operating Mode:	`Stateless`
Server startup parameters	`-db rtb-db -ld rtb -H db-host -S db-service -N tcp -rereadnolock`
PROPATH:	`rtb-install-folder;rtb-install-folder\rtb\proxy\p;@{WinChar Startup\PROPATH};@{WorkPath}`

`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 11 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.

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.

2.6.2   Configuring Client Partition Definition

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 on the OpenEdge PRO*Tool 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.

3   Updating from Earlier Versions of Roundtable

3.1   Backup Your Repository

It is recommended that you backup your existing Roundtable repository database before beginning the Roundtable 11 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   New Indexes

New indexes have been added to several tables in the Roundtable repository. To improve performance during the installation process, all new indexes have been added as inactive. Therefore, it will be necessary to rebuild ALL repository indexes after the installation is complete.

The syntax for rebuilding database indexes is as follows:

```
proutil database -C idxbuild
```

Please see "Rebuilding Indexes" in the *OpenEdge Data Management: Database Administration* manual for more details on using this utility.

3.3   Data Processing

As part of the schema update process, several tables will have contents dumped and/or initial values set for new fields. Because of this additional processing**, the schema update portion of the installation could take quite some time**. Please be patient during the pre-schema update and post-schema update processing phases of the schema update and allow these processes to finish running. *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*.

3.4   Updating from 10.2B

Follow these steps to update a Roundtable 10.2B 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 Contents of the Database Parameters File for Schema Update", please ensure that the `#release` line is `#release=102B`. 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=1100` to reflect the new schema level of the repository.
3. Continue with the setup, compiling the Roundtable program files.

3.5   Updating from 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 Contents of the Database Parameters File for Schema Update", please ensure that the `#release` line is `#release=101C`. 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=1100` to reflect the new schema level of the repository.
3. Continue with the setup, compiling the Roundtable program files.

3.6   Updating from Versions Earlier than Version 10.1C

If your Roundtable repository was created with a version of Roundtable earlier than version 10.1C, 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 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

The Roundtable TSMS plug-in for OpenEdge allows developers using OpenEdge Architect or Progress Developer Studio for OpenEdge access to their Roundtable TSMS repository. Although not a full-featured client, the Roundtable TSMS plug-in allows access to the most common Roundtable TSMS developer functionality. The Roundtable TSMS plug-in accesses the repository database via the OpenEdge AppServer partition described earlier in this guide.

5.1 Software Requirements

5.1.1   Client

Clients using the Roundtable 11.0 plug-in require the following minimum software components be installed on the client computer:

- Progress Developer Studio 11.x
- OpenEdge Architect 10.2B

5.1.2   Server

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

- For Progress Developer Studio 11.0 clients , Roundtable TSMS 11.0 Server running under OpenEdge 11.0 AppServer.
- For OpenEdge Architect 10.2B clients, Roundtable TSMS 11.0 Server running under OpenEdge 10.2B AppServer

5.2   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. The menu options differ between OpenEdge Architect 10.2B and Progress Developer Studio for OpenEdge 11 so the steps are a general guideline.

1. Launch OpenEdge Architect 10.2B or Progress Developer Studio for OpenEdge 11.0.
2. Choose the **Install New Software** option that is specific to your version of OpenEdge. This is found on the **Help** menu.
3. Add an update site for Roundtable specifying the following URL:
     http://www.roundtable-tsms.com/eclipse/update11
4. Select the **Roundtable TSMS for Eclipse** feature appropriate for your OpenEdge platform.
5. Select the **Roundtable Connector for OpenEdge** feature appropriate for your OpenEdge platform. Please note that you may have to deselect the "Show Latest Feature Versions Only" toggle to see the appropriate feature for your OpenEdge version.
6. Finish the wizard.

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

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 11.0, 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.