# IBM Rational DOORS Requirements Management Framework Add-On

# IRDRMFAO INSTALL GUIDE

IBM Rational DOORS Requirements

Management Framework Add-on

IRDRMFAO Install Guide

Release 6.0.0.4

Before using this information, be sure to read the general information under the "Notices" chapter on page 36.
This edition applies to <b>VERSION 6.0.0.4, IBM Rational DOORS Requirements Management Framework Add-on</b> and to all subsequent releases and modifications until otherwise indicated in new editions.
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# Table of Contents

1 INTRODUCTION6
2 CHECK THAT YOU MEET THE PREREQUISITE7
3 INSTALL IRDRMFAO8
3.1 Select the language to be used by the installer8
3.2 Warning 8
3.3 Accept Licence 9
3.4 Choose DOORS version
3.5 Select the installation Mode11
3.6 Select the installation Directory12
3.7 End of installation
4 SILENT INSTALLATION16
4.1 Create the response file
4.2 How to run the installer in silent mode
5 UNINSTALL IRDRMFAO18
5.1 Confirm uninstallation
5.2 Do uninstall
6 MODIFICATIONS IN THE ENVIRONMENT20
7 MENUS CONFIGURATION24
8 TROUBLESHOOTING26
9 UPGRADE OF IRDRMFAO PROJECTS27
10 CLIENT CONFIGURATION32
11 COMPLEMENTS33

IBM Rational DOORS Requirements Management Framework Add-on - Release	6.0.0.4
12 NOTICES	<u>36</u>

### 1 Introduction

This document describes the procedure to install IBM® Rational® DOORS® Requirements Management Framework Add-on on your computer. This software has been previously delivered by Telelogic as a Professional Service Asset named DOORS T-REK. IBM® Rational® DOORS® Requirements Management Framework Add-on is now an IBM Rational product in the continuity of DOORS T-REK. Depending on the context, customers installing IBM® Rational® DOORS® Requirements Management Framework Add-on may install the add-on on top of DOORS or they may upgrade an existing install of DOORS T-REK. The two cases are supported by the software.

The install Wizard will drive the installation for you but some restrictions are applied and will be specified in the next chapters.

In the body of this document IRDRMFAO or RMF means IBM® Rational® DOORS® Requirements Management Framework Add-on.

The Installation Wizard allows you to install IRDRMFAO in several ways:

- Full installation: it means that all the IRDRMFAO files will be installed on your computer, either:
  - In the directory where the DOORS client was installed (default mode)
  - In another directory (mode called "out of place" installation)
- Workstation installation: it means that your IRDRMFAO installation will depend on a full installation done on a file server. The main advantage of this installation mode is the ease of maintenance: when upgrading to a newer version of IRDRMFAO, you only need to perform one single installation, on the file server.

#### **BEWARE!**

To upgrade a workstation installation of DOORS T-REK 5.3p2 (or earlier) to IRDRMFAO 6.0.0.4 you have to (re)install IRDRMFAO on all the client computers because the client installation is not backward compatible with a client installation for T-REK

The Installation Wizard is available in three languages: English, French and German.

IRDRMFAO also supports **Silent installation**. In this mode the interactions with the user are replaced by a parameter file. See § 4 "Silent Installation" to learn how to setup and run a silent installation.

IRDRMFAO contains also a binary component, allowing using the graph layout capabilities of Graphviz. This binary component is the program GraphvizContainer.exe. It is executed when the **Explorer** is called, in order to generate the graph layouts.

# 2 Check that you meet the prerequisite

Before installing any version of IRDRMFAO, it is required to uninstall any previous version of IRDRMFAO or of DOORS T-REK.

- To install IRDRMFAO, you must have Administrator rights.
- Your computer must have at least 43 MB of free disk space for a full installation, or only 1 MB for an installation in workstation mode.
- IRDRMFAO 6.0.0.4 is restricted to Windows platforms and compatible with DOORS versions :
  - DOORS 9.1
  - DOORS 9.2
  - DOORS 9.3
- The WEXP and the irdrmfao.dot modules of IRDRMFAO are compliant only with all versions of Word starting from Word 2000 up to Word 2010.
- Check that you have rights to create files into the DOORS Home directory (directory where DOORS has been installed) and to modify the Windows Registry.
- Only one version of IRDRMFAO may be installed with the Wizard. This
  install is not compatible with the existence of a previous version of
  IRDRMFAO or of DOORS-TREK, whatever the version, except in the case
  where the two installations are for two different versions of DOORS.

# 3 Install IRDRMFAO

Installing IRDRMFAO with its Installation Wizard is an easy action. Just follow the screenshots, don't forget the prerequisite and everything will be fine.

#### 3.1 Select the language to be used by the installer



This choice only define the language used by the installer. This has no effect on the language for IRDRMFAO (always in english).

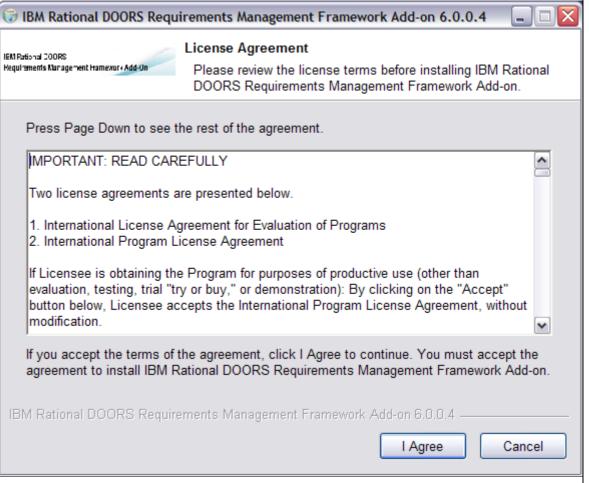
#### 3.2 Warning



The installation wizard can successfully install IRDRMFAO 6.0.0.4 only if no previous version of IRDRMFAO (whatever the version) was installed for the same version of DOORS. Whenever another version of IRDRMFAO has been installed for another version of DOORS, the installation will be successfully performed.

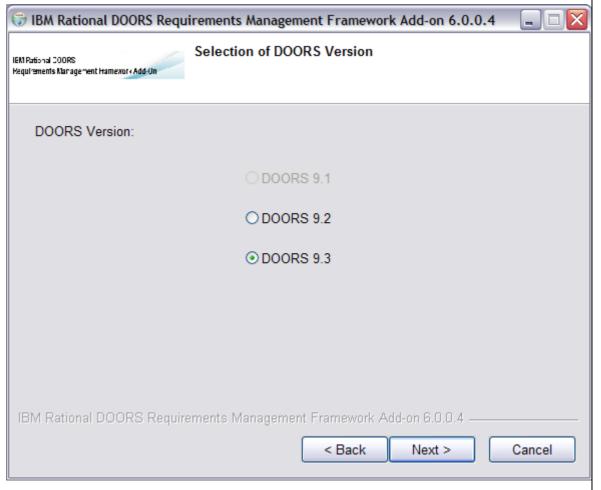
Click "Yes" after checking that IRDRMFAO is not already installed for the version of DOORS that you plan to install IRDRMFAO 6.0.0.4 against. Otherwise, click « No » and then unistall IRDRMFAO before running the installed again.

#### 3.3 Accept Licence



After reading this agreement, accept it to continue the installation or deny it to quit the installation.

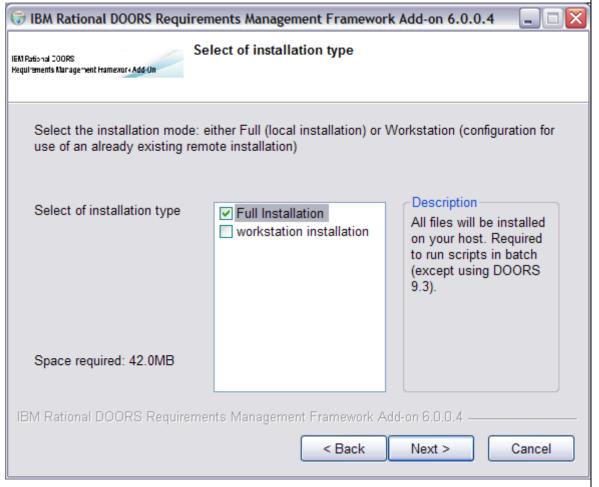
#### 3.4 Choose DOORS version



In this page, simply choose for which version of DOORS, IRDRMFAO will be installed. To install IRDRMFAO on several DOORS versions, you have to execute the Installation Wizard several times.

The installer automatically detects which version of DOORS is installed so that the choice of a version that is not installed, is disabled (greyed out).

#### 3.5 Select the installation Mode



In this page, you are asked to choose either to fully install IRDRMFAO on your computer, or rely on a remote installation of IRDRMFAO.

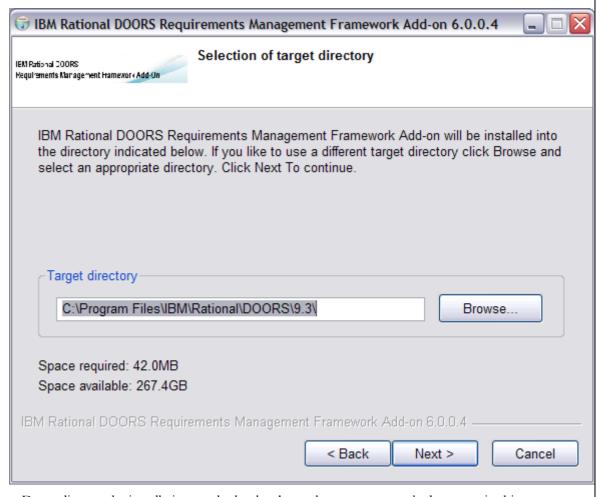
This second possibility called "workstation installation" consists in configuring the selected version of DOORS to use a remote installation. The advantage of this workstation installation is the simplicity to upgrade to a newer version of IRDRMFAO later on. There is no need to upgrade IRDRMFAO on each DOORS client computer: only the shared installation of IRDRMFAO shall be changed.

#### **BEWARE!**

To run scripts in batch mode, RMF must be installed in "full installation" mode <u>and</u> in the default directory (the HOME of DOORS)

This limitation does not apply if you are using DOORS 9.3

#### 3.6 Select the installation Directory



Depending on the installation mode that has been chosen, you are asked to enter in this page:

- in the "<u>full installation</u>" mode : the directory where IRDRMFAO should be installed
- in the "workstation installation" mode: the path to a remote installation of IRDRMFAO.

This path to be entered is the directory where IRDRMFAO has been installed (in the "full installation" mode), i.e the following sub-directories should exist in that directory: "lib" and "IRDRMFAO".

Important:

To make it easier to install IRDRMFAO in workstation mode, the right path can be automatically provided to the user.

To achieve that, you have to create a file called "IRDRMFAO.INI" containing this path, and run the installer in a directory containing this "IRDRMFAO.INI" file.

The "IRDRMFAO.INI" file shall have the following content:

[Server]

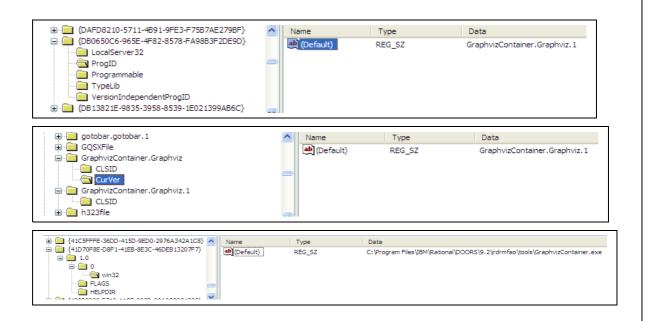
IrdrmfaoDir=<directory of the remote installation of IRDRMFAO>

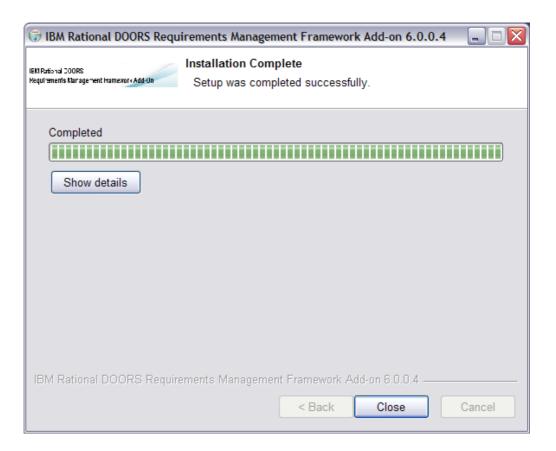
#### Example:

[Server]
IrdrmfaoDir=\\UKSERV1\DOORS\irdrmfao

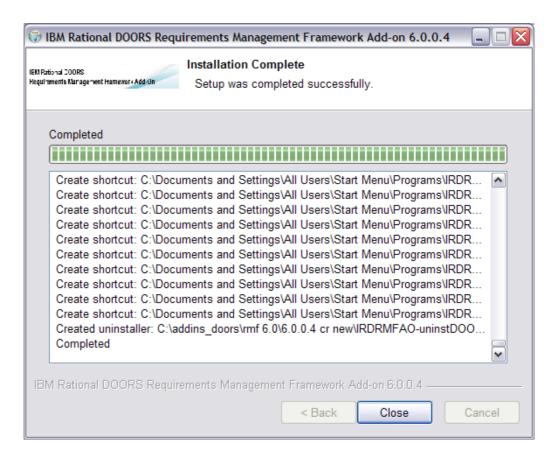
#### 3.7 End of installation

During installation phase, the GraphvizContainer executable is registered as an OLE server:



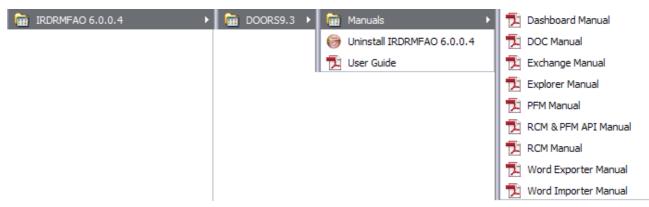


Click on the button "Show details" to obtain precisely what was done.



After the installation of IRDRMFAO, you may check the correct execution of the setup program:

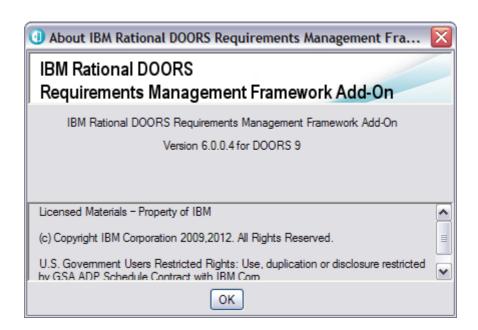
1. A new menu will appear in the Windows start menu and you will have some shortcuts to the IRDRMFAO documentation and the shortcut to uninstall IRDRMFAO.



2. Execute the DOORS client to access to the DOORS data base.

You should have a RMF menu in the DOORS explorer tool, and also in the module windows.

Run the About operation in the RMF menu (for project and for module), a dialog box should be displayed as :



3. Open a Word document. You should be able to see the IRDRMFAO menu bar, as in:



If the menu bar is not visible, the **irdrmfao.dot** file has not been copied into the Office startup directory and is not visible as a Word complement.

Current version is 1.13. The macros are digitally signed and therefore no longer require your MS Word security options to be lowered to the level "Medium".

# **4 Silent Installation**

IRDRMFAO supports Silent Installation mode.

When the installer is run, it does not ask anything to the used but instead read some parameters into a response file.

#### 4.1 Create the response file

The response file shall be called "IRDRMFAO.INI" and be located in the same directory as the installer.

This "IRDRMFAO.INI" file shall have the following content:

```
[SilentInstall]
InstallMode=full OR workstation
DoorsVersion=<version number (see examples below)>
InstallDir=<directory in which IRDRMFAO will be installed - useful ONLY in full mode>
IrdrmfaoDir=<directory of the remote installation of IRDRMFAO - required ONLY in workstation mode>
```

#### NB:

- 1. in full installation mode, if the parameter "InstallDir" is missing, then IRDRMFAO will be installed in the Installation directory of DOORS.
- 2. DOORS version number format : <major>.<minor>

Example: 9.2

3. If the DOORS version provided is not one of the available DOORS versions, then IRDRMFAO is by default installed for the most recent version of DOORS.

Some examples below:

```
[SilentInstall]
InstallMode=workstation
DoorsVersion=9.2
IrdrmfaoDir=\\uranus\rmf6.0
```

```
[SilentInstall]
InstallMode=full
DoorsVersion=9.2
```

```
[SilentInstall]
InstallMode=full
DoorsVersion=9.2
InstallDir=D:\Software\RMF\v6.0
```

#### 4.2 How to run the installer in silent mode

The response file shall be located in the same directory as the installer.

Then simply run the installer passing /S on the command line (case sensitive):

```
ratlDOORS RequirementsFrmwork 6-0-0-4.exe /S
```

You can aslo request the creation of a log file that will contain an error message whenever the installation fails.

```
ratlDOORS_RequirementsFrmwork_6-0-0-4.exe /S /LOG=<file
path>
```

#### Exemples:

```
ratlDOORS_RequirementsFrmwork_6-0-0-4.exe /S
/LOG=C:\temp\IRDRMFAO.log
ratlDOORS_RequirementsFrmwork_6-0-0-4.exe /S
/LOG="C:\IRDRMFAO\IRDRMFAO.log"
```

The IRDRMFAO installer returns an error level as a result of its execution, and write the following error messages into the log file:

Error level	Comment	Content of the log file
0	Normal execution (no error)	
2		IRDRMFAO installation aborted : the response file IRDRMFAO .ini is missing
3	Installation aborted by script	IRDRMFAO installation aborted : invalid parameter 'InstallMode' in the file : IRDRMFAO.ini
4		IRDRMFAO installation aborted : none of the supported DOORS versions is installed
5		IRDRMFAO installation aborted : bad or missing parameter 'IrdrmfaoDir' in the file : IRDRMFAO.ini

# **5 Uninstall IRDRMFAO**

To uninstall IRDRMFAO, use the shorcut directly present in the start menu or go directly to "Add/remove Programs" in the Control Panel.

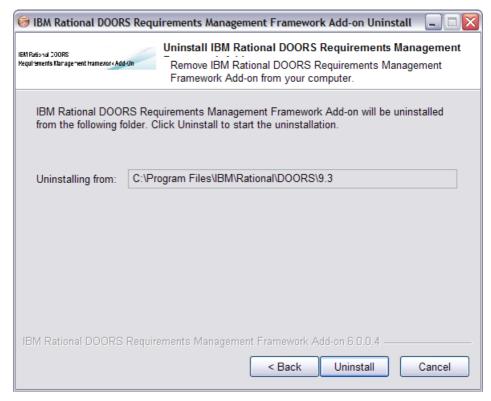
#### 5.1 Confirm uninstallation

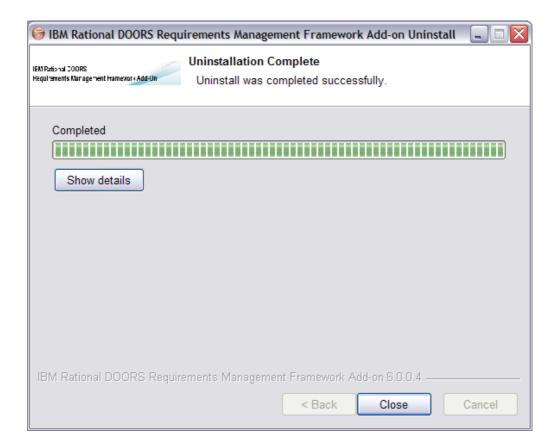


Before beginning the uninstallation, the Wizard will ask you if you want to remove IRDRMFAO.

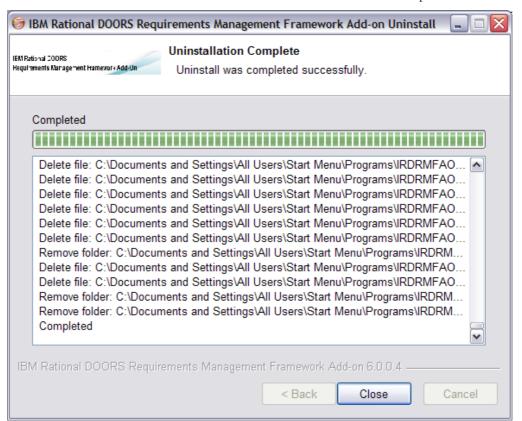
#### 5.2 Do uninstall

After this window, there is no way to return if you decide to uninstall IRDRMFAO. If yes, you will have the next window as follows:





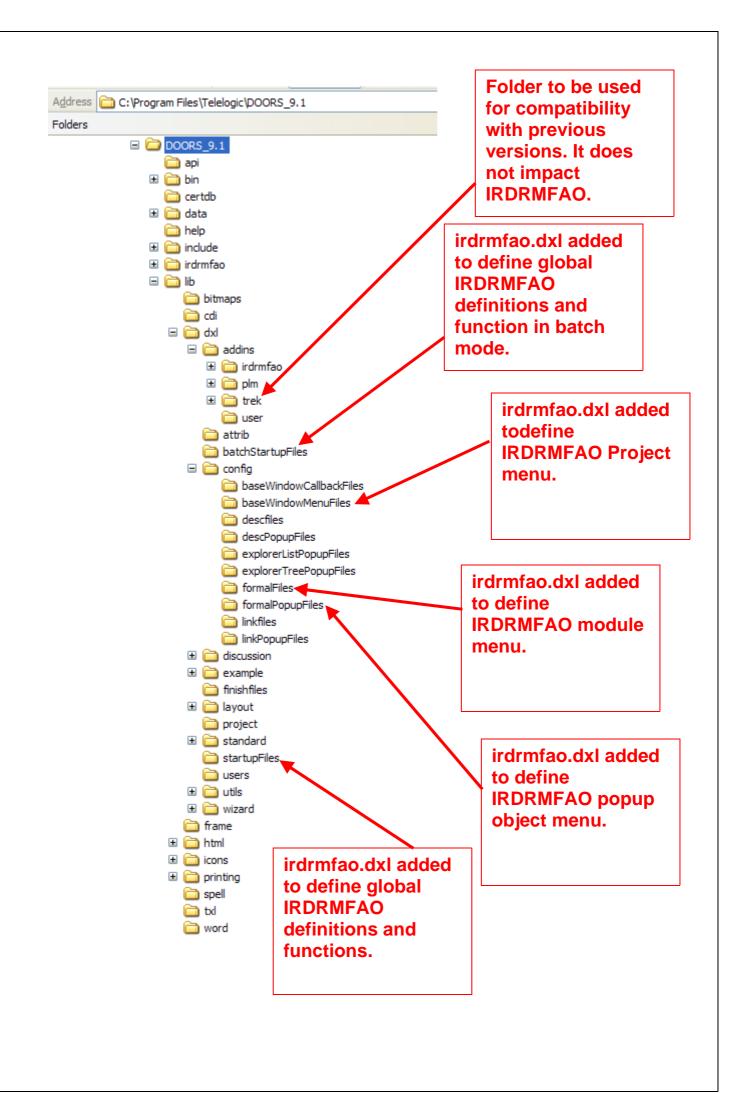
Click the button "Show details" to see the details of the uninstallation process.



# 6 Modifications in the environment

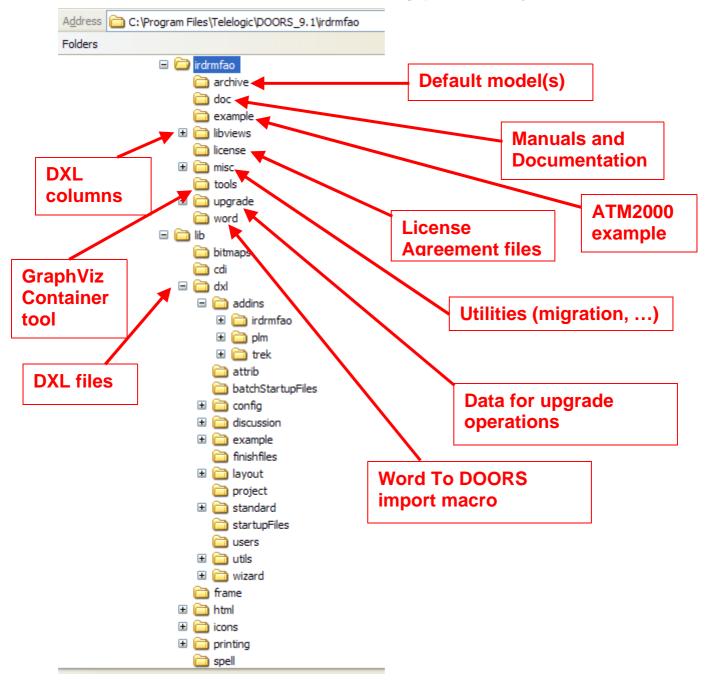
When installing IRDRMFAO, some modifications of your standard DOORS environment occur. Several files are added into the IRDRMFAO standard directories.

Example for DOORS 9.1:



These files are added in case of default installation or out of place installation. In case of an out of place installation, the IRDRMFAO install may be anywhere in the file system. These file are source DXL files, but they do not contain DXL definition, but only includes to DXL source files that are located always in the IRDRMFAO install directory.

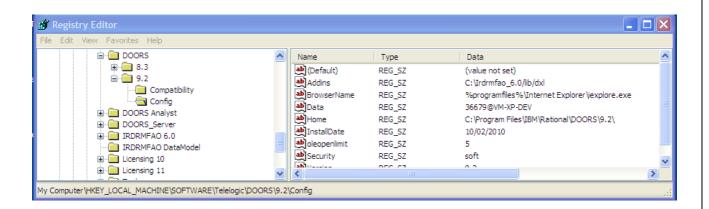
The structure of the IRDRMFAO files is displayed in the next figure:



In case of default installation, the "IRDRMFAO" directory is replaced by the DOORS install directory, for example: "C:\Program Files\IBM\Rational\DOORS\9.2".

The **irdrmfao.dot** Word complement file should be automatically installed into the standard Office startup directory, if not; it is required to copy by hand this file into the right place.

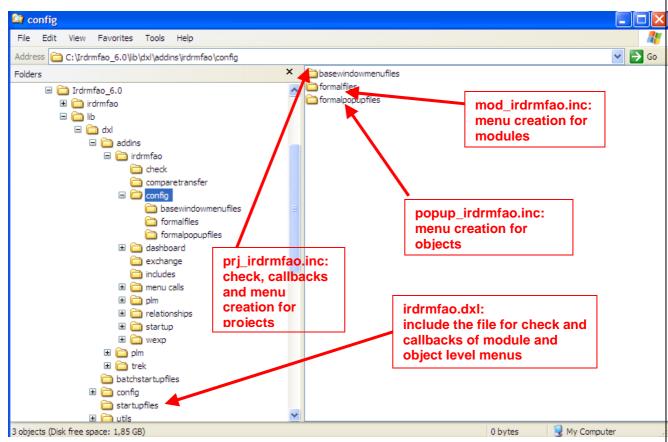
In case of out of place install, the setup program modifies the registry key **Addins**, allowing defining the list of complementary directories:



# 7 Menus configuration

All the IRDRMFAO menus are dynamically created and checked. The corresponding code is not uncrypted, and it is possible to change these menus. Only people with a good knowledge of DOORS and IRDRMFAO should modify these files that are coded into DXL.

The different files that are involved into the IRDRMFAO menu creation are:



Example: RMF menu for projects

```
void RMF declareItem (string sName, int checkFunction(), void executeFunction())
    createItem (checkFunction, executeFunction, sName, null, null, modKeyCtrl, null
            ,null, sName, sName)
const string RMF MENU RMF = "RMF"
int RMF MENU RMF check()
     return menuAvailable
const string RMF ITEM CREATE PROJECT = "Create/Tag a RMF Project"
void RMF ITEM CREATE PROJECT exec() {eval "#include <addins/irdrmfao/menu
             calls/project/CREATE P.DXL>"}
int RMF ITEM CREATE PROJECT check ()
     User u = find()
     if (null u)
            return menuUnavailable
     UserClass c = u.class
     if (c != databaseManager)
             return menuUnavailable
     Folder f = current
     if (null f || !canControl(f))
             return menuUnavailable
     return menuAvailable
// RMF menu
RMF declareMenu (RMF MENU RMF, RMF MENU RMF check)
RMF declareItem (RMF ITEM CREATE PROJECT, RMF ITEM CREATE PROJECT check,
             RMF ITEM CREATE PROJECT exec)
RMF declareItem (RMF ITEM CONFIGURE PROJECT, RMF ITEM CONFIGURE PROJECT check,
             RMF ITEM CONFIGURE PROJECT exec)
RMF declareItem (RMF ITEM CREATE MODULE, RMF ITEM CREATE MODULE check,
             RMF ITEM CREATE MODULE exec)
separator
RMF declareMenu (RMF MENU EXPLORE, RMF MENU EXPLORE check)
     RMF declareItem (RMF ITEM INDEX, RMF ITEM INDEX check, RMF ITEM INDEX exec)
     RMF_declareItem (RMF_ITEM_SCOPE, RMF_ITEM_SCOPE_check, RMF_ITEM_SCOPE_exec)
     separator
     RMF declareItem (RMF ITEM EXPLORE MODEL, RMF ITEM EXPLORE MODEL check,
             RMF_ITEM_EXPLORE_MODEL exec)
     RMF declareItem (RMF ITEM EXPLORE PROJECT, RMF ITEM EXPLORE PROJECT check,
            RMF ITEM_EXPLORE_PROJECT_exec)
     RMF declareItem (RMF ITEM EXPLORE MODULE, RMF ITEM EXPLORE MODULE check,
             RMF ITEM EXPLORE MODULE exec)
end menu
```

# 8 Troubleshooting

If DOORS reports some errors after the installation of IRDRMFAO, check:

- That the file named **irdrmfao.dxl** exists in the **config** and **startupfiles** directories of DOORS.
- Checks the content of the other files in the same directories, to detect any conflict between the IRDRMFAO files and the other files.
- Checks the content of the file "...Migration.dxl", in the startupfiles directory. Suppress any IRDRMFAO file inclusion found in this file.
- O Check the content of the predefined **startup.dxl** file.

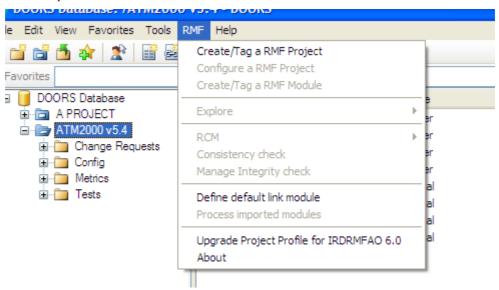
Always remove the previous version of IRDRMFAO (or any installed T-REK version) before reinstalling IRDRMFAO.

# 9 Upgrade of IRDRMFAO projects

IRDRMFAO 6.0.0.4 operations are available only for project updated or created for IRDRMFAO 6.0.0.4. An "upgrade" operation is provided with IRDRMFAO 6.0.0.4. This upgrade operation makes the project configuration compatible with IRDRMFAO 6.0.0.4, for any previous IRDRMFAO or DOORS T-REK version.

The project data are not modified by the upgrade, nor the existing module types in project configuration, except in case of migration of a previous DOORS T-REK version, with the RCM component deployed on the project. In this last case, because of the modification of the RCM trigger management, the old RCM triggers at **project level** are deleted and created again, but at **module level**.

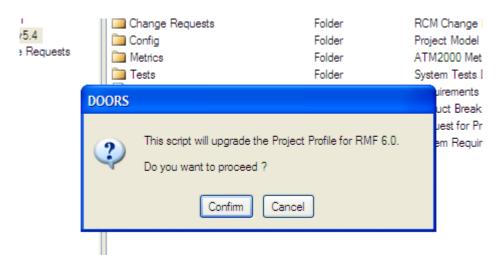
#### Example:



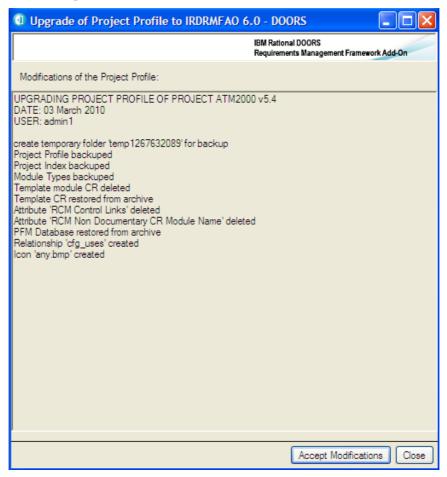
The "Upgrade Project Profile for IRDRMFAO 6.0" operation is visible only for the RMF projects not yet compatible with IRDRMFAO 6.0.

The execution of this operation will extend the "Project Profile" of your project, and with add some new module types in the "Module Types" folder.

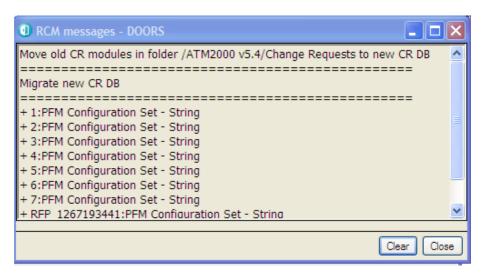
Execute the "Upgrade" operation



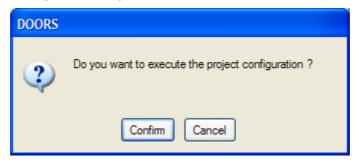
• Accept the modifications



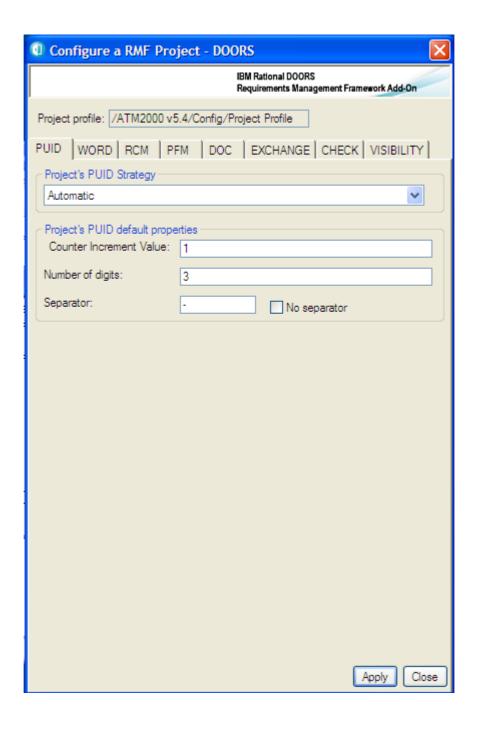
• If RCM has been previously deployed on the project, the CR project database structure is checked to be modified if required (for old T-REK versions) and the CR modules are upgraded according to the current CR template



• If you want to use RCM, DOC or EXCHANGE functionalities, you may execute the default project configuration (if these functionalities have not been configured yet)



• If you have answered 'Confirm', then the project configuration utility is automatically executed:



The modifications done inside the profile depends from the last version of IRDRMFAO that was used in the project. Upgrade operation adds all required definitions allowing the new version of IRDRMFAO to be usable. For example, an upgrade from 5.2 to 6.0 corresponds to this list of modifications:

```
Template module NON_DOC_CR_LIST deleted
Template module CR deleted
Template CR restored from archive
Object Attribute 'IE Priority' created
Object Attribute 'IE Model View deleted
Object Attribute 'IE View Name created
Object Attribute 'IE View' created
Module Attribute 'RCM CR Impact Mandatory' created
Object Attribute 'IE Is Contextual Attribute' created
Module Attribute 'IE PFM Configuration Index' created
```

```
Module Attribute 'RCM Is Specific Version Code' created
Module Attribute 'RCM Detect links to working obj with different CR'
Module Attribute 'RCM Repair Link Modification' created
Attribute 'RCM Control Links' deleted
Attribute 'RCM Non Documentary CR Module Name' deleted
Section 'Definition of the Views' created
Section 'Definition of the icons' created
Module Type 'Non Documentary CR List' deleted
Template 'NON DOC CR LIST' deleted
PFM Database restored from archive
Icon 'any.bmp' created
Icon 'cr.bmp' created
Icon 'db.bmp' created
Icon 'di.bmp' created
Icon 'id.bmp' created
Icon 'ivv.bmp' created
Icon 'pbs.bmp' created
Icon 'sr.bmp' created
Icon 'ur.bmp' created
View 'Definition of the Templates' created
View 'Definitions of the Model Views' deleted
View 'Definition of the Views' created
View 'Definition of the Icons' created
```

Some technical templates in the **Module Types** folder may be also replaced. The templates that are associated with tools and not to the user data model are:

- CR: Change Request template. Used by RCM.
- DASHBOARD: Dashboard template, used by Dashboard functionality.
- DI: Document Index, used by DOC.

No existing module of your project is modified by the Upgrade.

To complete the upgrade of your project, you will probably have to upgrade your already existing templates and your project modules as well.

# 10 Client configuration

DOORS allow you to give parameters on the command line of the shortcut used to execute the DOORS client. The list of parameters may be found in the DOORS standard documentation.

Here you can find some useful examples.

#### Connexion to a database server different from the standard one

-data 36677 @ my\_server

may be used to define the DOORS server from which the data should be downloaded (in the example on the port 36677 of the my\_server computer)

#### Connexion with a user name already defined

-user my\_name

may be used to define the DOORS login name.

#### Installation of IRDRMFAO on an application server (or file server)

-addins or -a " $\ \$  server $\$  IRDRMFAO $\$  lib $\$  dxl"

to define a directory to find the IRDRMFAO addins. This information may be also entered in the registry configuration of the DOORS client, or in the "ADDINS" environment variable. In the example *app\_server* is the name of the computer used as application server.

-dx1 "#include <\\\\app\_server\\IRDRMFAO\\lib\\dxl\\startupfiles\\irdrmfao.dxl>"

to specify a startup file. This parameter cannot be defined in the registry.

These parameters allow you to have different IRDRMFAO contexts. You should notice that the command line has a limited size, in case of overflow you may define these three values as a combination of registry/environment variables values and command line.

Also, it is required to add the **irdrmfao.dxl** files in the standard DOORS **config** directory.

# 11 Complements

IRDRMFAO is delivered with some sample or utility DXL script files.

Content of the directory irdrmfao\misc\addins	
History.zip	DOC complement useful to generate a revision table based on the changes between the versions of a document.
lib_no_irdrmfao.zip	Files needed on a DOORS client installation to edit a module created with RMF.
RMF_kitchen.zip	RMF kitchen scripts.  To install it, unzip it in the directory DOORSHOME\lib\dxl\addins

Content of the directory irdrmfao\misc\api	
(Example of the use of the RCM & PFM API)	
check_module_rcm.dxl	This example script demonstrates how to look into a module under RCM control, to get the list if requirements, the list of versions and the CR associated with each new version.
modify_module_rcm.dxl	Example of the modification of a RCM controlled module:
	-create a CR
	-create a new object
	-create a new version (modification)
	-accept the CR
set_module_rcm.dxl	Sets a module under RCM control.

Content of the directory irdrmfao\misc\attributes	
(DXL attributes)	
ie_puid.dxl	code to create "IE PUID" as a DXL attribute whose value is based on "absolute number"
rcm_last_in_ref.dxl	code to create a DXL attribute indicating whether a controlled object version is the last version in reference

Content of the directory irdrmfao\misc\migration	
migrate-rcm.dxl	This script migrates the modules under RCM control created with TREK 5.2 (or a previous version). It either migrate all the modules of the project of only those located in the current folder (and subfolders).

	This script:
	- creates new RCM attributes and sets their values
	- makes sure that all the controlled object versions have an impact object (this was not the case for the first version previously)
	- updates the impact objects
migrate-rcm- batch.dxl	Same as previous. Meant to be run in batch mode.
patch- dashboard.dxl	This script is useful to update the dashboard modules that have been created before IRDRMFAO v5.4
	It recusively scans the database (reading modules) from the current folder to find and upgrades all the dashboards
	You need write access to the installation directory of IRDRMFAO to perform this upgrade.
patch-puid.dxl	This script is useful to fix the DXL columns and DXL attributes of modules created with TREK.
	The script fixes the regular expression "[\\]" that is no longer supported and also performs some other modification for compatibility with DOORS Web Access.
	It can be used on a module or recusively on a folder or a project.
	It can be used in batch mode, in which case a log file will be created (the environment variable LOG_FILE can be used to define the location of the log file)
upgrade-all- projects.dxl	This script upgrades all the RMF projects of the database to the current version of RMF.

Content of the directory irdrmfao\misc\1	model
define_description.dxl	set the descriptions of views and attributes according the configuration file model.txt
synchronize_definitions.dxl	This script synchronizes all the modules of the project with the definitions of their templates.

Content of the directory irdrmfao\misc\other	
restore_cancelled.dxl	example of restoration of a requirement from the information saved into a cancel CR
restore_links.dxl	use of the history to restore links
unlockbsd.dxl	unlock a baseline set definition

Content of the directory	irdrmfao\misc\pfm_browser
pfmuserdefs.inc	Implementation of the user-defined commands of the PFM browser

Content of the directory irdrmfao\misc\project_index	
create_index.bat	Create the Project Index of a project in batch
create_index.dxl	
update_index.bat	Update the Project Index of a project in batch
update_index.dxl	

Content of the directory irdrmfao\misc\wexp	
batchwexp.dxl	execution of WEXP without interaction and possibly in batch mode

Content of the directory irdrmfao\misc\wexp_spooler	
batch management of the WEXP spooler	
spooler_getlog.bat	
spooler_pause.bat	
spooler_remall.bat	
spooler_remlocks.bat	
spooler_restart.bat	
spooler_stop.bat	
startspooler.bat	

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