

Installation Guide

Integrating Worksoft Certify[®] with IBM Rational[®] Quality Manager



Integrating Worksoft Certify with IBM Rational Quality Manager Installation Guide

Version 3.6

© Copyright 2016 by Worksoft, Inc. All rights reserved.

Worksoft is a business name of Worksoft, Inc. Information in this document is subject to change and revision without notice. The software described herein may only be used and copied as outlined in the Software License Agreement. No part of this manual may be reproduced by any means, electronic or mechanical, for any purpose other than the purchaser's personal use, without prior written permission from Worksoft.

Worksoft provides this documentation "as is" without warranty of any kind, either express or implied. Worksoft may revise information in this document without notice and does not represent a commitment on the part of Worksoft, Inc.

Worksoft, Inc. may have patents or pending patent applications covering subject matter in this document. The furnishing of this document does not give you any license to these patents except as expressly provided in any written license agreement from Worksoft, Inc.

Patent

Worksoft Certify®

U.S. Patent No. 7,600,220

Trademarks

Worksoft Certify® is a registered trademark of Worksoft, Inc.

Microsoft Office® is a registered trademark of Microsoft Corporation in the United States and/or other countries.

Microsoft® is a registered trademark of Microsoft Corporation in the United States and/or other countries.

All other trademarks and trade names mentioned in this guide are the property of their respective owners.

Third-Party Copyrights

This product includes software developed and copyrighted by the following persons or companies:

- ◆ Reprise License Manager™
- ◆ Data Dynamics, Ltd., ActiveReports
- ◆ Microsoft® Enterprise Library
- ◆ Infragistics® NetAdvantage®
- ◆ Apache Logging Services log4net
- ◆ Antlr ANTLR

The above copyright holders disclaim all responsibility or liability with respect to its usage or its effect upon hardware or computer systems.

Worksoft Installation Guide

Table of Contents

Chapter 1 Installing Rational Quality Manager Integration Files	4
System Requirements	5
Certify Clients	5
IBM RQM Server	5
Worksoft Web Service (Optional)	5
Installing Worksoft Integration Web Components on an IBM Jazz Team Server	6
Installing the Worksoft RQM Adapter on Remote Client Machines	8
Chapter 2 Configuring Your System	11
Overview	12
Configuring Rational Quality Manager Settings	12
Updating the Certify Settings	14

Worksoft Installation Guide

Chapter 1 Installing Rational Quality Manager Integration Files

In This Chapter

System Requirements	5
Installing Worksoft Integration Web Components on an IBM Jazz Team Server.....	6
Installing the Worksoft RQM Adapter on Remote Client Machines.....	8

System Requirements

When you integrate your IBM® Rational® Quality Manager (RQM) with Worksoft Certify®, you increase your automation capabilities while extending your existing test and validation processes.

Before integrating Rational Quality Manager with Certify, ensure that your system meets the following requirements.

Certify Clients

Certify clients must have one of the following operating systems installed:

- ◆ Windows® 7
- ◆ Windows® 8

Each client also needs Java® Runtime Environment v1.6 (6.0) or later versions installed.

Verify that all of the clients meet the system requirements of Worksoft Certify v9.0.1 or later versions listed in the *Worksoft Certify Installation Guide*.

IBM RQM Server

The Worksoft Certify Rational Quality Manager plug-in v3.6 is compatible with Rational Quality Manager v4.0.4, v5.0, and v6.0.

Earlier versions of the Worksoft Certify Rational Quality Manager plug-in are compatible with IBM RQM v4.0.3 or earlier versions.

Worksoft Web Service (Optional)

Several Worksoft products require a web service. If you already have Worksoft Certify Connect™ or Worksoft Management Studio™ installed in your network, you are able to utilize this service to assist you with your integration.

However, this integration does not require a web service that pulls project and process names from the database. Without this service, you will manually enter these names in the Rational Quality Manager.

If you have a service that you want to utilize, then you will enter this information into the Worksoft Certify Adapter.

Installing Worksoft Integration Web Components on an IBM Jazz Team Server

Before you install the Worksoft Rational Quality Manager integration files, it is recommended that you have one of the following Certify services installed on your web server:

- ◆ Certify Connect
- ◆ Worksoft Management Studio

If you already have installed one of these services because of other Worksoft products' requirements, you do not have to reinstall it.

If you do not have this service, you are still able to integrate with Certify. You will have to manually type in the project and process names.

► *To install Worksoft Certify web components to the IBM Jazz Team Server:*

- 1 From the IBM RQM integration package, select the appropriate archive file in the **CertifyRQMPlugin >3.6** directory to use for your operating system:
 - For Windows users, select **CertifyRQMIntegration.zip**.
 - For UNIX® users, select **CertifyRQMIntegration.tar**.
- 2 Unzip this file to a location on the IBM® Rational® Jazz® Team Server where the server can access its resources. Do not unzip the file within the IBM Jazz Team Server directory tree.

Examples:

For Windows: C:\Program Files\Worksoft\CertifyRQMIntegration

For UNIX: /opt/Worksoft/CertifyRQMIntegration

Within the CertifyRQMIntegration directory, the following files and directories appear:

- CertifyAdapterHelp
 - Documentation
 - worksoft-site
 - worksoft-profile.ini
- 3 Copy the **worksoft-profile.ini** file to the following directory on your IBM Jazz Team Server:
 - For Windows: InstallDir\server\conf\qm\provision_profiles
 - For UNIX: InstallDir/server/conf/qm/provision_profiles
 - 4 Copy the **worksoft-site** folder to the following directory on your IBM Jazz Team Server:
 - For Windows: InstallDir\server\conf\qm\sites
 - For UNIX: InstallDir/server/conf/qm/sites
 - 5 For these changes to take effect, reset your system:
 - First, all users must log off the system before you can reset it.
 - Secondly, reset your system by using a URL, such as this example:
`https://<jazz server host name>:<port number>/qm/admin?internal#action=com.ibm.team.repository.admin.serverReset`



Note: The URL may be slightly different for different Rational Quality Manager versions, so you may need to check for your specific version.

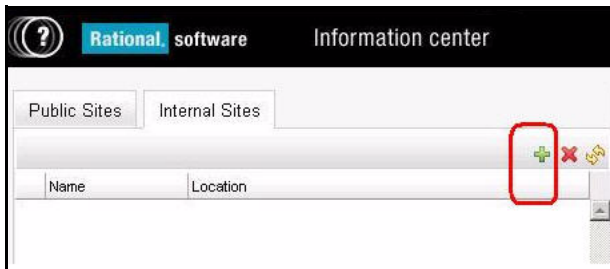
- 6 After you have reset your system, click **Request Server Reset**.
A message stating that the IBM Jazz Team Server has been flagged to reset and reload when it is restarted appears.
- 7 In order for the reset to take effect, shut down and restart the IBM Jazz Team Server.
After the server restarts, you should be able to select Certify as a script type when creating new test scripts.

► **To install Worksoft Certify web help to the IBM Jazz Team Server:**

- 1 In your browser, navigate to the following URL:
`https://clmwb.ibm.com:9443/clmhelp/updater/updatewar.jsp`
- 2 In the Rational Software screen, click the **Internal Sites** tab.



- 3 Click the **Add Internal Site** button to create a new help section for Worksoft.



The Add Internal Site dialog box appears.



- 4 In the Name field, type **Worksoft Help**.
- 5 Click the **Browse** button to browse to where the Worksoft help is located:
C:\Program Files\Worksoft\CertifyIntegration\CertifyAdapterHelp\site.xml
- 6 Click **Open**.
The directory appears in the URL field.
- 7 Click **OK**.
The Worksoft Certify web help is installed on Rational Quality Manager.

Installing the Worksoft RQM Adapter on Remote Client Machines

If you are interested in creating a lights-out testing environment with remote client machines, then you will need to install the Worksoft RQM Adapter to each client. The RQM Adapter registers itself to the IBM Jazz Team Server, and listens for requests to execute Certify processes. Each client machine that has the RQM Adapter running with a valid configuration will be listed in the IBM Rational Quality Manager as a valid resource to kick off a test script or process.

Each remote machine that you plan to integrate with the IBM Rational Quality Manager requires the following installations:

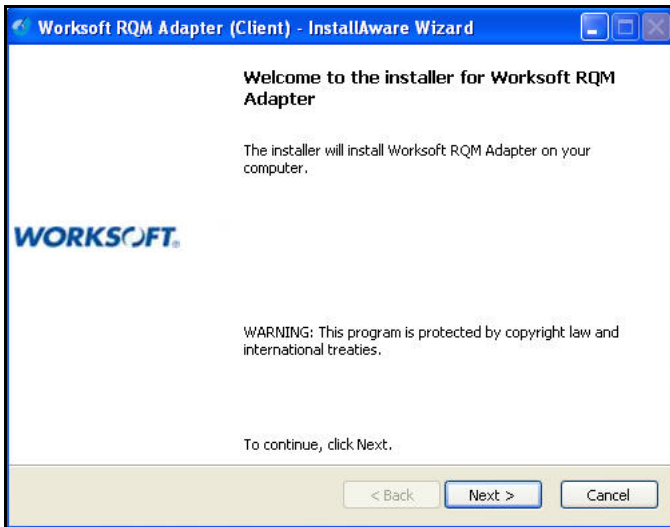
- ◆ Worksoft Certify client
- ◆ Worksoft RQM Adapter that is included in this package



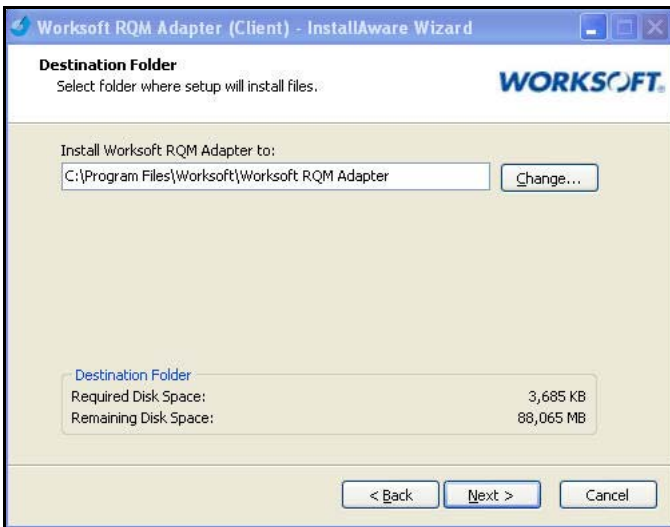
DO NOT INSTALL the Worksoft RQM Adapter on the IBM Jazz Team Server.
DO NOT INSTALL the Worksoft RQM Adapter on any server hosting other Worksoft products, such as Certify Connect™, Certify Impact™, Certify Business Process

► **To install the Worksoft RQM Adapter on a remote client machine:**

- 1 In the CertifyRQMPlugin directory, double-click the **Worksoft RQM Adapter.exe** file.
The Worksoft RQM Adapter opens.

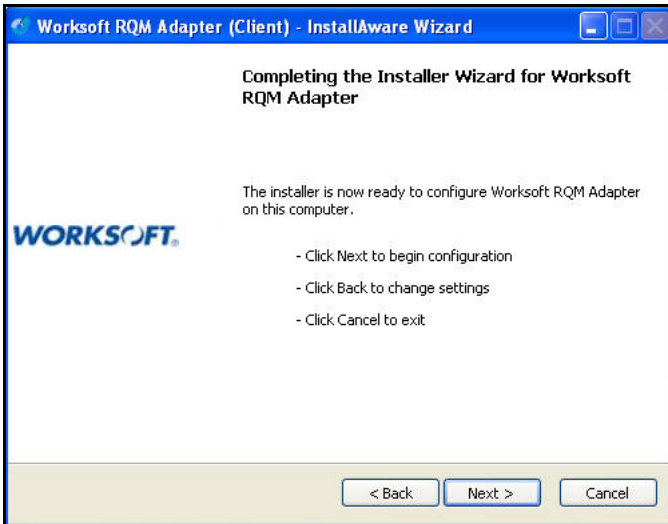


- 2 Click **Next**.
The Destination Folder page appears.



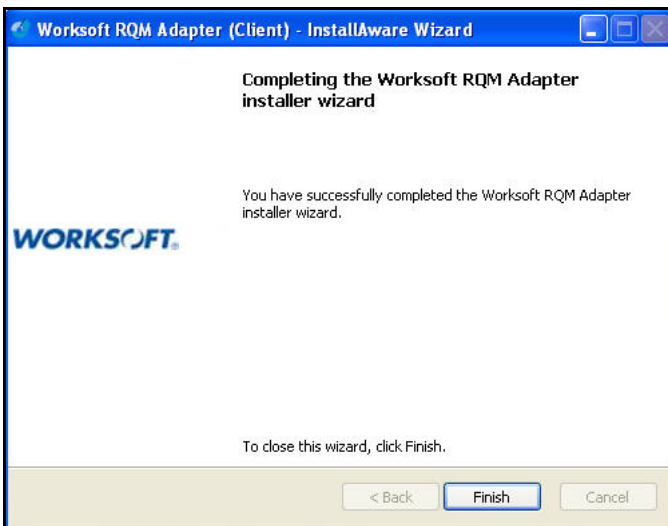
- 3 If you want to accept the default directory for your installation files, click **Next**.
If you do not want to accept the default directory for the installation files, click the **Change** button to select a different installation directory for the Certify client, and then click **Next**.

The Completing the Install page appears.



- 4 Click **Next** to begin the installation.

The installation process completes, and the Setup Complete page appears.



- 5 Click **Finish** to complete the installation process.

Worksoft Installation Guide

Chapter 2 Configuring Your System

In This Chapter

Overview	12
Configuring Rational Quality Manager Settings	12
Updating the Certify Settings	14

Overview

Before you create your tests in the IBM Rational Quality Manager (RQM), you will need to configure settings for Rational Quality Manager and Certify in the Worksoft Certify Adapter.

► **To access the Worksoft Certify Adapter:**

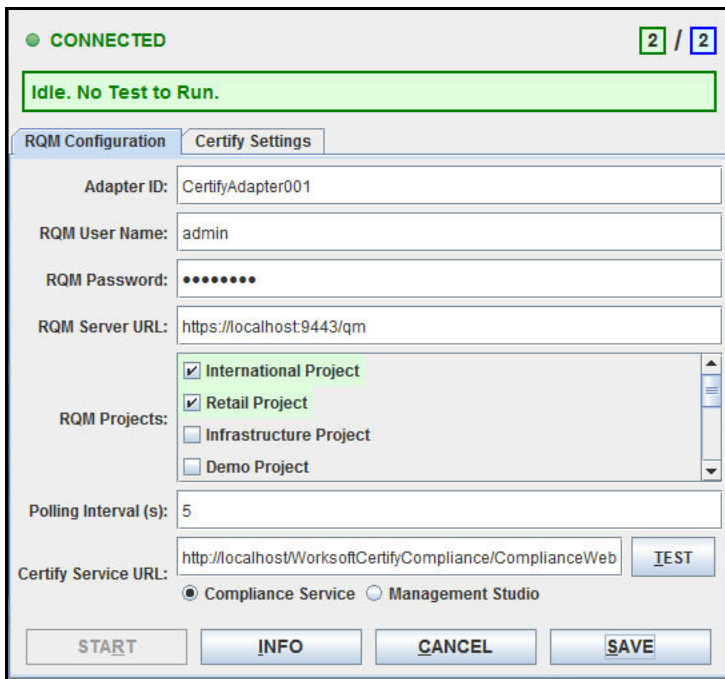
- 1 Navigate to the following directory:
C:\Program Files\Worksoft\Worksoft RQM Adapter
- 2 Double-click **start.cmd** to open the Worksoft Certify Adapter.

Configuring Rational Quality Manager Settings

With the Worksoft Certify Adapter, configure your Rational Quality Manager settings.

► **To select project(s) in the Worksoft Certify Adapter:**

- 1 Click the **RQM Configuration** tab in the Worksoft Certify Adapter.



2 Enter the following information:

Field	Description
Adapter ID	Certify Adapter ID
RQM User Name	Name of the RQM user
RQM Password	RQM user password
RQM Server URL	RQM Server URL address
RQM Projects	Select the RQM projects in which you plan to create tests.
Polling Interval(s)	Number of seconds Certify Adapter goes into sleep mode
Certify Service URL (Optional)	<p>If you want to utilize a Certify Service, type in the URL address to your Certify service.</p> <p>Select which service you already have installed:</p> <ul style="list-style-type: none"> • Certify Compliance Service • Worksoft Management Studio <p>If you want to test the service, click the TEST button.</p> <p>Note: If you do not have this service, you are still able to integrate with Certify. You will have to manually type in the project and process names.</p>

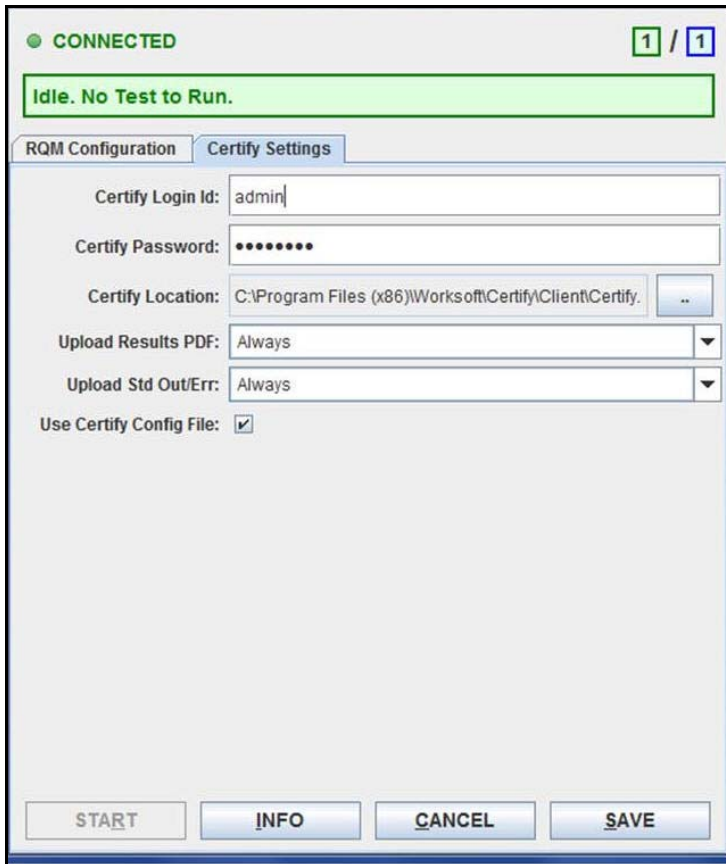
3 After you have made all of your changes, click **Save**.

Updating the Certify Settings

You will now need to update your Certify Settings.

► **To update the Certify Settings:**

- 1 Click the **Certify Settings** tab in the Worksoft Certify Adapter.



- 2 Enter the following information:

Field	Description
Certify Login ID	Certify login ID
Certify Password	Certify password
Certify Location	Location of where Certify is installed on your machine Example: C:\Program Files (x86)\Worksoft\Certify\Client\Certify.exe

Field	Description
Upload Results PDF	From the drop-down list, select whether you want to upload a results PDF file: <ul style="list-style-type: none"> • Always • Only Upon Error • Never
Upload STD Out/Err	From the drop-down list, select whether you want to upload Standard Output or Standard Errors: <ul style="list-style-type: none"> • Always • Only Upon Error • Never
Use Certify Config File	Select this option if you want to use the Certify.exe.config file. If you do not select this option, you will need to complete the Certify Database options.

3 If you did select the Use Config File option, go to **Step 4**.

If you did not select the Use Certify Config File option, you will need to enter the following information in the Certify Database section:

Field	Description
Alias Name	Alias Certify database name
Server Name	Certify database server name
Database Name	Certify database name
User Name	User name for database server
Password	Password for database server
Windows Authentication	If you want Windows Authentication, select this option.

4 Click **Save**.

You are now ready to create your tests in the Rational Quality Manager. For more information, see the [Worksoft Help Portal](#).