Telelogic Synergy

Installation Guide for Windows

Release 7.0

Before using this information, be sure to read the general information under , "Appendix: Notices" on page 69.

Table of contents

1 *Introduction*

This chapter explains what you must know before installing Telelogic® Synergy™ on Windows® operating systems.

Readme

The *Readme* file contain vital information about your Telelogic Synergy software, including information about new features in this release, and a list of the supported hardware and operating systems. Review this information before installing your software. The *Readme* is available on the Telelogic Synergy Support site at `https://support.telelogic.com/synergy`. For more information about obtaining documents, see "Telelogic Synergy documentation" on page 5.

> **Note** If necessary, the *Readme is* revised and reissued to provide the most current information. To ensure you have the latest version, download an electronic copy from the Telelogic Synergy Support web site.

Upgrade from a previous release

Existing Telelogic Synergy servers and databases can be upgraded to the current release of Telelogic Synergy. The upgrade process is described in the *Telelogic Synergy Upgrade Instructions for Windows.* These instructions are available on the Telelogic Synergy Support site (`https://support.telelogic.com/synergy`), and in the documentation that is shipped with Telelogic Synergy.

Release summary

Installation-related features

Telelogic Synergy has the following features relating to installation in the 7.0 release:

- **Windows Start menu path**

  Telelogic Synergy is now accessed from the Windows taskbar in the following location: **All Programs** > **Telelogic** > **Telelogic Synergy 7.0**.

  For more information about this option, see step 15 of "Server Installation" on page 35.

- **Shortcut to open a window for running Telelogic Synergy commands**

  To open a window for running Telelogic Synergy commands: On the Windows taskbar, click **Start > All Programs > Telelogic > Telelogic Lifecycle Solutions Tools > Telelogic Synergy 7.0 > CM Command Prompt**. This path assumes that you used the default program folder during your installation.

- **Typical Client installation option removed**

  The Typical Client installation option was removed, since the Compact Client is the most commonly used client. Instead, use the Custom option to install engine services if needed on a client system.

Interfaces installed by Telelogic Synergy 7.0

Telelogic Synergy offers the following graphical user interfaces.

- **Telelogic Synergy**

  This interface was formerly called Telelogic Synergy for Developers. It is for users in the *developer* or *build_manager* role. It contains functionality for development and build management activities.

- **Telelogic Synergy Classic**

  This interface was formerly called the "original client" and contains functionality for CM administrators and DCM administrators.

Release compatibility

The following are important characteristics of this release:

- In order for Telelogic Synergy to run, the client, engine, and database must all be from the same release and service pack; you cannot mix components from different Telelogic Synergy releases or service packs.

- In order for Telelogic Synergy to run, you must install the license server.

- Windows clients may be used with both UNIX and Windows servers.

- UNIX clients may only be used with UNIX servers.

- Telelogic Synergy Release 7.0 must be available on a Windows client before that client can access a 7.0 database.

Telelogic Synergy 7.0 is compatible with Telelogic Change 5.1 or later. If you are already using Telelogic Change, you must upgrade to Telelogic Change 5.1 or later at the same time as you upgrade to Telelogic Synergy 7.0.

User prerequisites

To install the main server, you need the following:

- A Windows system administration background including local and domain Administrative privileges.

- Knowledge of your company's hardware infrastructure and network topology

- A working knowledge of how your company will use Telelogic Synergy. For example, will you need to configure your installation for remote builds?

To install a compact client, you may need the privileges or permissions described in "Install the compact client" on page 64.

Contacting IBM Rational Software Support

Support and information for Telelogic products is currently being transitioned from the Telelogic Support site to the IBM Rational Software Support site. During this transition phase, your product support location depends on your customer history.

Product support

- If you are a heritage customer, meaning you were a Telelogic customer prior to November 1, 2008, please visit the Synergy Support Web site.

  Telelogic customers will be redirected automatically to the IBM Rational Software Support site after the product information has been migrated.

- If you are a new Rational customer, meaning you did not have Telelogic-licensed products prior to November 1, 2008, please visit the IBM Rational Software Support site.

Before you contact Support, gather the background information that you will need to describe your problem. When describing a problem to an IBM software support specialist, be as specific as possible and include all relevant background information so that the specialist can help you solve the problem efficiently. To save time, know the answers to these questions:

- What software versions were you running when the problem occurred?

- Do you have logs, traces, or messages that are related to the problem?

- Can you reproduce the problem? If so, what steps do you take to reproduce it?

- Is there a workaround for the problem? If so, be prepared to describe the workaround.

Other information

For Rational software product news, events, and other information, visit the <u>IBM Rational Software Web site</u>.

Conventions used in this guide

The table below describes the typeface and symbol conventions used in this guide.

Typeface	Description
Italic	Used for book titles and terminology. Also designates names of roles (*developer*), states (*working*), groups (*ccm_root*), and users (*laura*).
Bold	Used for items that you can select and menu paths, also used for emphasis.
`Courier`	Used for commands, filenames, and directory paths. Represents command syntax to be entered verbatim. Signifies computer output that appears on-screen. Also used for the names of attributes (`modify_time`), commands (`ccm start`), functions (`remote_type`), and types (`csrc`).
`Courier Italic`	Represents values in a command string that you supply. For example, (`drive:\username\commands`).

This document also uses the following conventions:

Note Contains information that should not be overlooked.

Caution Contains critical information that must be observed or damage to the database or system could result.

Telelogic Synergy documentation

Unless otherwise noted, Telelogic Synergy documents are available on the Telelogic Synergy Support site (`https://support.telelogic.com/synergy`), and in the Documentation DVD shipped with Telelogic Synergy.

2 *Terms and Concepts*

To perform the operations described in this guide, you should first understand the following terms and concepts.

Telelogic Synergy client	A *Telelogic Synergy client* is a user interface process.
Telelogic Synergy database	A *Telelogic Synergy database* is an object-oriented repository that stores controlled files, change requests, and their properties. A file's properties include the file's source and creation date, and many other properties such as its relationship to other files.
Telelogic Synergy database server	The *database server* hosts the Telelogic Synergy databases.
Telelogic Synergy server	The *Telelogic Synergy server* hosts all Telelogic Synergy components: the database server, engine, client, license manager, object registrar, router, administrative tools, and web server.
Telelogic Synergy CCM server	The *Telelogic Synergy CCM server* hosts the web-based Telelogic Synergy help, the Windows client installation image, and the automated update process available for Windows client installations. For details on the Telelogic Synergy CCM Server, see "CCM Server Administration" in the *Telelogic Synergy Administration Guide for Windows*.
engine server	An *engine server* hosts the engine processes that communicate between the Telelogic Synergy client and the Telelogic Synergy database.
object registrar	The *object registrar* tracks and communicates all changes made to Telelogic Synergy database objects so that each

user's view of the database remains up to date. You must run one object registrar per database host.

router

The *router* manages the communications among CM processes. You must run one router per network installation.

Telelogic license server

The *license server* validates users' access to Telelogic Synergy databases, FLEXnet is used to manage licenses. You must run one license manager per network installation, and only on the computer for which the license was issued.

work area

A *work area* is a location in your file system to which Telelogic Synergy copies files when you check them out. Your work area can reside anywhere in the network file system. As you update files, Telelogic Synergy synchronizes changes in the work area with the database.

3   *Telelogic Synergy Installation Checklist*

Use the following checklist, in the sequence shown, to install and run the
Telelogic Synergy software.

Pre-installation

Prepare to install the Telelogic Synergy software.

- Read the "Introduction" on page 1.

- Review the *Readme*.

- Read "Pre-Installation" on page 13. Pay special attention to "Server
  installation planning" on page 15 and "Client installation planning" on page
  19.

- Fill out the appropriate space planning worksheets.

  To plan space for a server installation, see "Main and additional Windows
  server space planning" on page 17.

  To plan space for a client installation, see "Client space planning" on page 20.

- If you are upgrading from a previous release, read the *Telelogic Synergy Upgrade
  Instructions for Windows*.

Installation

> **Note** If you are installing Telelogic Synergy on both UNIX and Windows platforms, install it first on the platform where you will be running the Telelogic Synergy router. To install Telelogic Synergy on UNIX, refer to the *Telelogic Synergy Installation Guide for UNIX* or the *Telelogic Synergy Installation Guide for UNIX (Oracle)*.

Licensing

Install the Telelogic Synergy licensing software before you install Telelogic Synergy.

To install the licensing software, see the *Telelogic Lifecycle Solutions Licensing Guide*. This document is included in the Telelogic Lifecycle Solutions Kit or can be downloaded from the Lifecycle Solutions section of the Support site at (`https://support.telelogic.com/lifecyclesolutions`).

Telelogic Synergy

Install the Telelogic Synergy software. If you are unsure what to install, see "What to install" on page 13.

- To install the main Windows server, see "Install the main Windows server" on page 27.

- To install an additional Windows server, see "Install an additional Windows server" on page 44.

- To perform a custom installation, see "Perform a custom installation" on page 57.

- To install a compact client, see "Install the compact client" on page 64.

Post-installation

After installing the Telelogic Synergy software, do the following, as directed. You will need to reference the *Telelogic Synergy Administration Guide for Windows*. This document is available on the Telelogic Synergy Support site (`https://support.telelogic.com/synergy`) and on the Documentation section of the DVD.

- Unpack a database.

  This procedure must be performed before you can start a Telelogic Synergy session. It is described in the "Create through unpack" section of the *Telelogic Synergy Administration Guide for Windows*.

- Add users to the database.

  This procedure is described in the "Add Users to a Telelogic Synergy Database" section of the *Telelogic Synergy Administration Guide for Windows*.

- Configure the build computers, if necessary.

  You can do this for an installation area or for a database. This procedure is described in the "Set Up Build Machines" section of the *Telelogic Synergy Administration Guide for Windows*.

- Install and configure Telelogic Change, if necessary.

  You need to do this only if your team will use the Telelogic Change tool. This tool is described in the *Telelogic Change Installation Guide for Windows*, *Telelogic Change Installation Guide for UNIX*, and Telelogic Change online help.

- Coordinate the customization of local types with your site's type developer. Creating and modifying types is described in Telelogic Synergy CLI or Telelogic Synergy Classic Help.

- Implement a database backup plan.

  Guidelines for doing this are given in the "Telelogic Synergy Database Backup and Recovery" sections of the *Telelogic Synergy Administration Guide for Windows*.

- Publish the URL to the Windows client installation.

  Send this URL to Windows users who need to install the Telelogic Synergy 7.0 client on their computers.

Troubleshooting

For information about problems you might encounter while using Telelogic Synergy and information about how to solve the problems, review the *Readme*. Refer to "Readme" on page 1 for information about where to find the *Readme*.

To read technical support technical bulletins, see the Knowledgebase on the Telelogic Synergy Support site (`https://support.telelogic.com/ synergy`).

4   *Pre-Installation*

This chapter describes how to prepare your system for Telelogic Synergy software installation. It also contains information that will help you make decisions during your installation.

What to install

The following installation options are available for the Telelogic Synergy product.

- **Main Windows Server**

  Includes the client, engine, database server, administrative tools, object registrar, license manager, and router for Windows servers.

- **Additional Windows Server**

  Includes the client, engine, database server, administrative tools, and object registrar for Windows servers.

- **Custom Installation**

  Enables you to choose which Telelogic Synergy components you want to install.

- **Compact Client**

  Includes the client only, and is the most common choice if all you need is the client. This installation includes all user interfaces: Telelogic Synergy and Telelogic Synergy Classic.

In addition to installing Telelogic Synergy, you must also install the Telelogic License Server. This is a separate installation procedure from the product installation process. For more information, see "Licensing" on page 10.

What to install per customer site

All customer sites that will use the Telelogic Synergy Windows server must install a main Windows server on their network. Typically, the main server is installed on a Windows server computer. This installation (see "Install the main Windows server" on page 27) gives you everything you need to run Telelogic Synergy sessions, including the following:

- Telelogic Synergy Services

  These services include the router, license manager, object registrar, and engine startup service.

- Database Server

- Client

If your team needs more than one database server, you can install additional database servers on separate Windows server computers.

An alternative to installing a Telelogic Synergy Windows server is to install a Telelogic Synergy UNIX server, as explained in the *Telelogic Synergy Installation Guide for UNIX*.

The server should be installed before installing clients that will access the server.

Note Telelogic Synergy requires that the Windows browser service be enabled on each Telelogic Synergy Windows Server; otherwise, any ccmsrv option that requires the user to be a member of the Informix-Admin group will not work.

What to install per user

To start a Telelogic Synergy session, a compact client must be installed on the user's computer, or a client installation must be accessible on a shared network drive. The user can also install the client using the Custom installation option.

The following sections explain what you need to install for users running Windows 2003 or Windows XP Professional.

Windows users

Users running Windows have the following options.

- **Install the Compact Client**

  Most Windows users will install the compact client on the local computer. With this installation, only the client process runs on the user's computer; the engine process runs on the Telelogic Synergy server or on another system configured to run engines.

- **Access a Client Installation on a Shared Network Drive**

  An alternative to installing the Compact Client on each user's computer is for users to access a single shared installation on a network drive.

  After installing one main Windows server, you can create a network-share installation by installing a compact client on a network drive. Then, each Windows user can start Telelogic Synergy programs from the directory where the network installation resides. (Users will probably want to create desktop shortcuts to the programs they will use in the network installation.)

- **Custom Client Installation**

Some customer sites may want users to run the engine on their local computers. In this case, users can use the Custom installation option to install the client, engine, and Engine Start Service (ESS) on the user's computer.

Server installation planning

The following sections explain how to plan for the installation of a main Windows server and additional Windows servers. Custom installation requirements are also discussed. Read the section appropriate to the type of installation you need to perform.

Main and additional Windows server computer requirements

The table below shows the minimum system requirements, and the table on the following page shows the minimum configuration for server computers that will run the different types of Telelogic Synergy installations. Your installation may require more than the amounts shown in these tables. You will use the information in these tables while reviewing the worksheet shown in the section "Main and additional Windows server space planning" on page 17.

Type of Requirement	Type of Installation	Requirements
Operating System	Main/Additional server	See the *Readme* for a list of supported systems.
Disk Space	All installations — Telelogic Synergy file system requirements	1. Telelogic Synergy database file system requirements: — Allocate disk space according to the size of the data to be migrated to Telelogic Synergy. Plan extra space for the growth of this area. The database must reside on an NTFS file system partition. 2. informix_chunkfiles requirements: — Allocate disk space according to the number of users. The files must reside on a local NTFS file system partition. 3. Disk space for users' work areas: — Each Telelogic Synergy user should have enough disk space to store a full copy of any data on which the user will work.

Type of Requirement	Type of Installation	Requirements
Disk Space	Main server	To install a Telelogic Synergy Main Windows server: — Windows computers need a minimum of 630 MB of disk space.
	Additional server	To install a Telelogic Synergy Additional Windows server: — Windows computers need a minimum of 325 MB of disk space.
	Custom	To perform a custom installation (as shown in "Perform a custom installation" on page 57), add the disk and memory requirements for the configuration you want to install.
License File	Main server/Custom	A valid Telelogic Synergy license file is required. For more information on installing the Telelogic Synergy License Server, see "Licensing" on page 10.

The minimum configurations are shown below.

Type of Requirement	Type of Installation	Minimum Configuration
CPU	Main/Additional server	Xeon$^{®}$ 2 GHz dual processor or better
Memory (per Computer)	Main/Additional server	3 GB minimum
Virtual Memory	Main/Additional server	3 times physical RAM
Repository DB Space	Main/Additional server	2 GB partition

Main and additional Windows server space planning

The following worksheet describes how to allocate space for your main and additional Windows server installations.

INSTALLATION AREA MINIMUM CONFIGURATION
Separate programs and data for your installation as follows: 1) install Telelogic Synergy software into one directory, 2) install the Telelogic Synergy databases into another directory when you unpack a database, then 3) install the database server chunk files into a different directory. The following is an example of three drives and directories for a main installation: 1. `C:\Program Files\Telelogic\Telelogic Synergy 7.0`   (includes Telelogic Synergy/Informix executables) 2. `E:\ccmdb`   (Telelogic Synergy database directory on an NTFS file system partition) 3. `F:\informix_chunkfiles`   (includes database server chunk files (`rootdbs`, `tempdbs`, `log`, and `ccm`) on a local NTFS file system partition. For more information, see "Disk space considerations" on page 21). **Note** Directories 2 and 3 have the greatest growth potential. Plan for this growth by completing this worksheet before you install a main or additional server.
SPACE REQUIREMENTS EXAMPLE
System with Telelogic Synergy installed: `Telelogic Synergy main server` installation area: 630 MB (executables)   `informix_chunkfiles`:   200 MB (40 users)   `ccmdb` area: (might be much larger, depending   100 MB   on the size of projects in database) **minimum total of 930 MB**

MINIMUM SPACE CONFIGURATION

1. Telelogic Synergy installation (executables): 630 MB

2. `informix_chunkfiles` (data files):

   Installation Default (based on an average of 3.5 MB per user)

   40 users (default): 200 MB _____ MB

3. `ccmdb`:
   Telelogic Synergy databases expand as users migrate or create new data in them.
   Therefore, plan for disk space growth in the `ccmdb` file system location.

   The `ccmdb` file system must reside on a shared NTFS file system.

   Per database: minimum 200 MB

   TOTAL: _____ MB

Client installation planning

The following sections describe how to plan for the installation of a compact client.

Client computer requirements

The table below presents the minimum requirements, and the following table shows the minimum configuration for client computers. Your installation may require more than the amounts shown in these tables.

Type of Requirement	Type of Installation	Requirements
Operating System	Compact client	See the *Readme* for a list of supported systems.
Disk Space (per Windows computer)	Compact client	153 MB

The minimum configurations are shown below.

Type of Requirement	Type of Installation	Minimum Configuration
Hardware	Compact client	Core 2 Duo
Memory	Compact client	2 GB
Server	Compact client	3 GB
Virtual Memory	Compact client	3 times physical memory

Client space planning

The following worksheet describes how to allocate space for the Telelogic
Synergy Windows client software.

INSTALLATION AREA MINIMUM CONFIGURATION
The following is the default installation area for the Telelogic Synergy Windows client. You can keep this default or change it during installation. `C:\Program Files\Telelogic\Telelogic Synergy 7.0` (includes Telelogic Synergy executables for the Windows client)

SPACE REQUIREMENTS EXAMPLE	
System with Telelogic Synergy client installation:	
`Telelogic Synergy` installation area:	153 MB
User's work areas (per user on each user computer).	
This total depends on the size of your data.	100 MB
Work areas can also reside on a shared network drive.	
	TOTAL: 253 MB

MINIMUM SPACE REQUIREMENTS		
1. `Telelogic Synergy 7.0` installation area (compact client):		153 MB
2. User work area space requirements:		
— Each user's work area must be a directory that is writable by the user. You can define where to place your work area in the Home Directory field of the **Telelogic Synergy Startup Info** dialog box. This dialog box appears when you start a Telelogic Synergy session.		
— The area must be visible to all build/compile servers.		
For each work area, per user:	_____ X	200 MB
	TOTAL: _____ MB	

Prepare your system

Before you create the database server and start the database server processes, read the following sections to ensure that your system is properly set up for the database server.

Disk space considerations

When installing a database server, the setup program prompts you for the location of the Informix® chunk files (see step 17 on page 36). When you choose the location, keep the following in mind:

- Place the chunk files where no one will remove them. The chunk files should reside on a local disk on the database server computer.

Caution After you create a chunk file in a database server, **do not** move it. If you do, the database server will no longer work, and you might lose data.

- You must use a local NTFS file system.

- In the future, you might want to expand the capacity of an existing database server. If so, you will need to create additional chunk files. For instructions on how to do this, see "ccmsrv expand" in the *Telelogic Synergy Administration Guide for Windows.*

By default, Telelogic Synergy uses the following criteria to create the initial chunk of database space (dbspace):

- 1 MB multiplied by the number of users is used for root, log, and temp dbspace.

- 2 MB multiplied by the number of users is used for the initial ccm dbspace.

Note The above criteria are just a rough estimate of the initial database chunk. As a rule, generously allocate space for the ccm dbspace because this is where all users' metadata is stored and where the database typically grows.

Check the services file

The database server requires a Services file. It should be located in
`Windows\System32\drivers\etc\services`. If it is missing, check with
your system administrator before starting the database server installation process.

The Services file contains a single entry for each known service on the network,
and each line contains a service name, a port number, and a protocol. A name
alias is optional. The Services file contains information regarding the known
services on your network. The syntax of the file is `service_name`
`port_number/protocol` `[ alias ]` `[#comment]`.

The Telelogic Synergy installation program automatically updates the Services file
when you install the main Windows server, an additional server, or an engine.
You are prompted for the port number. In most cases, you should not change the
displayed default value.

The following is an example of an entry in the Services file:

```
turbo  1526/tcp      #Informix-OnLine Dynamic Server
```

where:

`turbo`   is the name of the Informix network service.

`1526`   is the port number and `tcp` is the protocol. The TCP/IP port
numbers must be identical on all hosts running Telelogic Synergy products.

`#comment` is any information that you want to add.

As long as the Services file exists and has been properly configured for your
network, no user modification should be necessary to run Telelogic Synergy.
Contact your system administrator if you have questions.

Note This service refers to a Transmission Control Protocol (TCP)
or User Datagram Protocol (UDP) port service. These
services are separate from the Windows services that are
discussed in the "Monitor the Services" section of the *Telelogic
Synergy Administration Guide for Windows*, and from those
administered by the Windows Service Manager.

Create a Telelogic Synergy administrator

Before starting the Telelogic Synergy product installation, you must create a user
to be the CM administrator, such as *ccm_root*. This user should be reserved for
CM administration. This user will have special privileges, so it should not be a
user in the *developer* or *build manager* role.

Telelogic license server installation

Telelogic Synergy uses the Telelogic® License Server™. The Telelogic License Server is a FLEXnet-based license server used to manage licenses for Synergy, DOORS®, and TAU® products. You must install the Telelogic License Server separately from the product installation process documented here in order to run Telelogic Synergy, even if you are not running other products. You should install the Telelogic License Server before you perform the Telelogic Synergy product installation.

For complete information about installing the license, see "Licensing" on page 10.

5

Server Installation

This chapter describes how to install the Telelogic Synergy main server software. Each site must complete this installation before unpacking a database. This chapter also describes how to perform an additional server installation as well as a custom installation.

Note You can install the Telelogic Synergy software on any supported Windows server. See the Readme file or the Telelogic Synergy Support web site for a list of the supported hardware and operating systems. Throughout this document, when a Windows server is discussed, the generic term "Windows server" is used.

Before you install the server software...

The main Windows server and additional servers should be installed by the CM administrator or system administrator.

If you are installing the Telelogic Synergy software for the first time, do the following:

- Read "Pre-Installation" on page 13.

- Be prepared to provide license information. See the section "Locating your server license file" in the *Telelogic Lifecycle Solutions Licensing Guide.*

- Be sure that your Windows main server computer meets the system requirements listed in "Main and additional Windows server computer requirements" on page 15.

- Read "Main and additional Windows server space planning" on page 17.

If you are installing an additional server, do the following:

- Read "Install an additional Windows server" on page 44.

Telelogic Synergy Windows server installation

You can install the main Windows server, additional servers, or a custom installation. Each installation is unique. Instructions for each start on the following pages:

- "Install the main Windows server" on page 27

- "Install an additional Windows server" on page 44

- "Perform a custom installation" on page 57

Before proceeding with the installation, consider the following:

- If you have not installed any of the Telelogic Synergy software and are unsure which type of installation you should perform, read "Pre-Installation" on page 13.

- If you have already installed the main server, but are unsure what to do next, refer to "Telelogic Synergy Installation Checklist" on page 9.

- If you have already installed the main Windows server or additional servers and want to install a client, see "Install the compact client" on page 64.

Install the main Windows server

The following instructions describe how to install the main Windows server, which includes the compact client, engine, database server, administrative tools, object registrar, license manager, and router.

Note In order to install a Windows Server, you must be licensed to use Telelogic Synergy on Informix.

You must install the main Windows server before installing additional servers or clients. If you have already installed the main server, but need to install more servers, see "Install an additional Windows server" on page 44.

There can be only one main Windows server per Telelogic Synergy license file. For more information, see "Setting up your server license" on page 28.

You must satisfy the following requirements before installing the main Windows server.

User Requirements: Member of local Administrators group

Permission to write to a local NTFS file system partition

Active Directory user

OS Requirements: See readme file or Telelogic Synergy Support web site

Prerequisites: The `%windir%\System32\drivers\etc\services` file must be writable and you must be logged on to a domain. `%windir%` is the Windows installation directory.

Note You must install the main server and any additional servers in a domain environment. To install additional servers, see "Install an additional Windows server" on page 44.

To install the main Windows server, perform the following steps.

1. Log on to the Windows domain.

2. Start the Telelogic Synergy installer.

   - If you are installing from a DVD, insert the DVD that contains the Telelogic Synergy Windows Server in the DVD drive. On the Windows taskbar, right-click the **Start** button to display a shortcut menu. Click **Explore** to open Windows Explorer. Navigate to `DVD_drive:\win_servers\synergy_server`, and double-click `setup.exe` to display the **Welcome** dialog box.
   - If you are installing from a download, double-click `synergy70.exe` to display the **Welcome** dialog box.

3. Click **Next** to display the **License Agreement** dialog box. Review and accept the terms of the license agreement.

4. Click **Next** to display the **Choose Destination Location** dialog box. You can accept the default installation location, or click **Browse** to specify a different location.

5. Click **Next** to display the **Setup Type** dialog box.

   If you **are** a domain user and a member of the local Administrators group, the **Setup Type** dialog box appears. Select **Main Server** and click **Next**, then proceed to step 6.

   Only one main server should exist on your network.
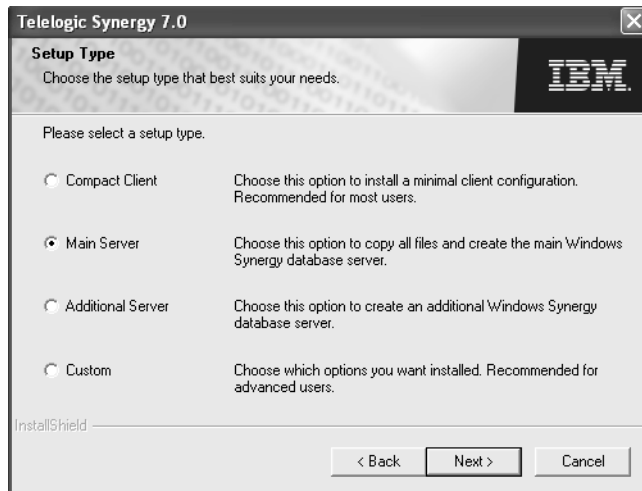
If you **are not** a domain user and a member of the local Administrators group, the installation program displays the **Telelogic Synergy Router Information** dialog box to install a compact client.
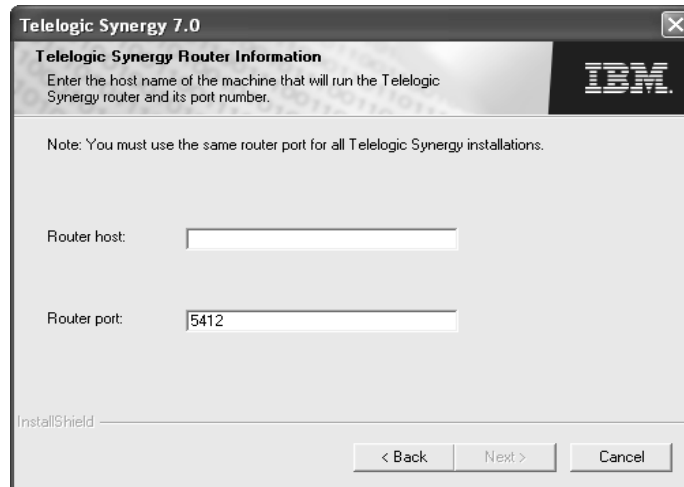
To resolve this, do the following:

a. Click **Cancel** to exit the `setup` program.

b. Log on as a domain user who is a member of the local Administrators group.

c. Start the main Windows server installation (see "Install the main Windows server" on page 27).

6. In the **Telelogic Synergy Administrator** dialog box, type your domain name in the **User domain** box, if necessary.

Type the **Admin user name** and **Password** in the appropriate boxes.

Note that the domain and Admin user must already exist before running the installation.
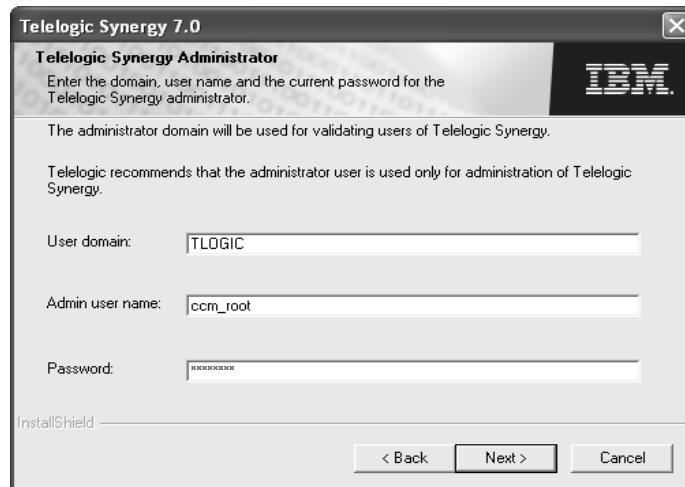
7. Click **Next** to display the **Informix Password** dialog box.

   • If you already have a user *informix*:

     You will be prompted for the *informix* user's password, and the password you enter will be verified by the installation program.

     Skip to step 8

   • If you do not have an *informix* user:

     The install program creates the *informix* user for you. The *informix* user is a member of the Informix-Admin group, and has the privilege to run the database server commands. In this case, you are prompted for the password, and asked to confirm the password, as shown in the following dialog box.

Type the password for the *informix* user in the **Password** and **Confirm password** boxes.


8. Click **Next** to display the **Install Telelogic Synergy Router** dialog box.
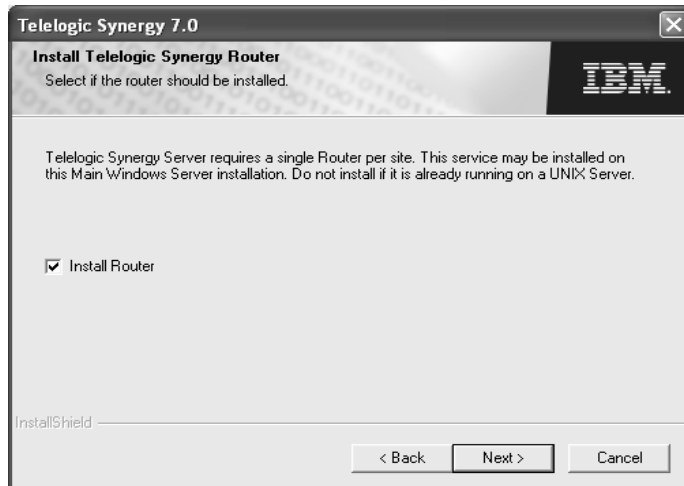
9. If you do not have a router installed, select **Install Router**. The Telelogic Synergy server requires one router per site.

If you already have a router running on UNIX, you should not install one on your Telelogic Synergy Windows server. You can share these services running on UNIX.

10. Click **Next** to display the **Telelogic Synergy Router Information** dialog box. If you selected **Install Router** in step 9, perform step a. Otherwise, perform step b.

a. If you are installing the router and license manager, the **Telelogic Synergy Router Information** dialog box prompts you only for port information.
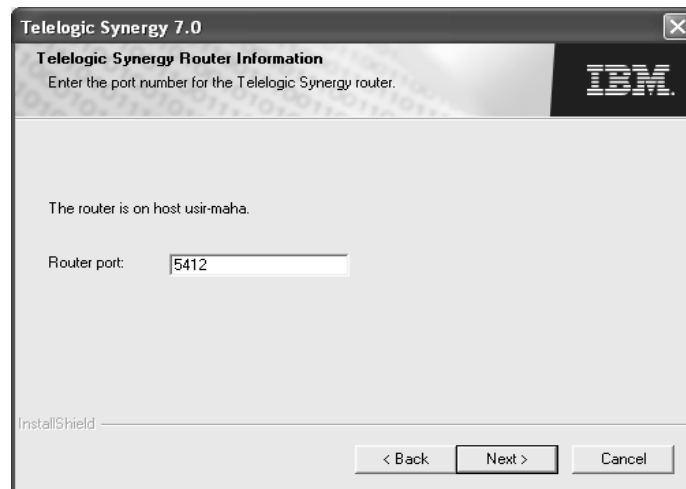
By default, the port number that the Telelogic Synergy router uses is 5412. If this port number is already in use, change the port number in the **Router port** box. If you are not certain that port number 5412 is available, look in your Services file, which is located in the `%windir%\System32\drivers\etc\services` directory. For more information, see "Check the services file" on page 22.

b. If you are **not** installing the router and license manager, the **Telelogic Synergy Router Information** dialog box prompts for router host **and** port information. By default, the port number that the Telelogic Synergy

router uses is 5412. The port number must be the same as the one specified on the router computer.
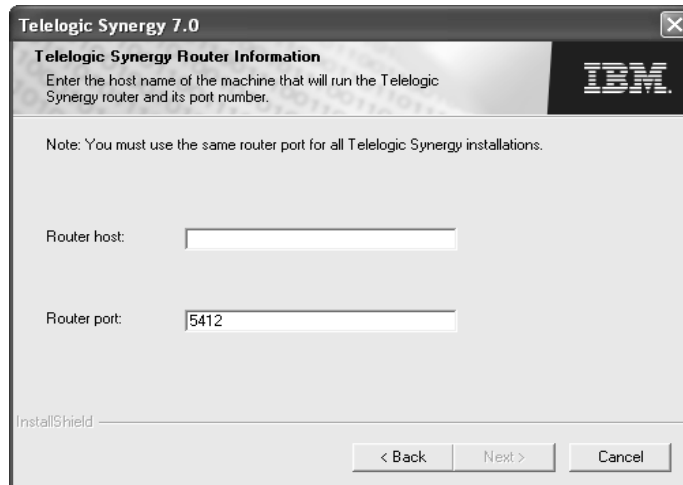

If you need to change the defaults, type the name of the router host and router port in the appropriate boxes.

11. Click **Next** to display the **Ccm Server Information** dialog box. The CCM server is a Web server that serves online help pages for all Telelogic Synergy GUI sessions, both Web mode and traditional mode. Telelogic Synergy requires one primary server, which runs on the router host system.
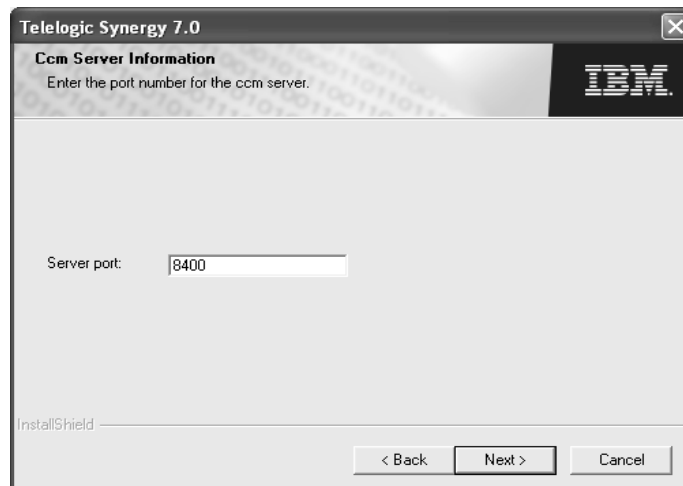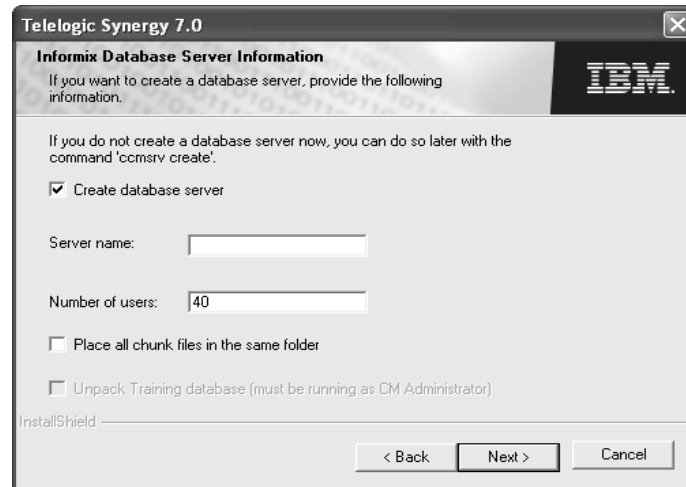
If the default primary server port number (8400) is already in use, change the port number in the **Port Number** box. If you are not certain that port number 8400 is available, look in your Services file, which is located in the `%windir%\System32\drivers\etc\services` directory. For more information, see "Check the services file" on page 22.

12. Click **Next** to display the **Informix Information** dialog box.
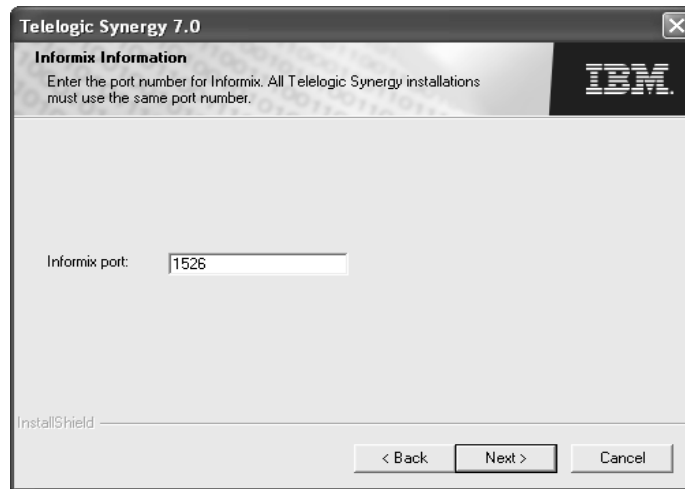
13. If the default Informix port number (1526) is already in use, change the port number in the **Informix port** box. If you are not certain that port number 1526 is available, look in your Services file, which is located in the `%windir%\System32\drivers\etc\services` directory. For more information, see "Check the services file" on page 22.

14. Click **Next** to display the **Informix Database Server Information** dialog box.

15. Create the Informix database server.

Telelogic Synergy 7.0

Informix Database Server Information
If you want to create a database server, provide the following information.

IBM.

If you do not create a database server now, you can do so later with the command 'ccmsrv create'.

☑ Create database server

Server name: [   ]

Number of users: [40]

☐ Place all chunk files in the same folder

☐ Unpack Training database (must be running as CM Administrator)

InstallShield

< Back   Next >   Cancel

The default settings in all Informix database server dialog boxes are only suggestions. You should configure these dialog boxes based on your planning estimates in "Main and additional Windows server space planning" on page 17. If you have not completed that section, do so before filling in these dialogs.

- If you are upgrading from a previous Telelogic Synergy release on the same computer, **do not** select **Create database server**. In all other cases, select this check box.

If you do not select **Create database server**, you will install the new Informix software, but you will not create a new database server.

Caution If you are upgrading from a previous Telelogic Synergy release on the same computer and you select **Create database server**, your old chunk files may be overwritten. This may result in loss of data. For more information, see the upgrade instructions relevant to your current installation.

- If you are creating a database server, type its name in the **Server name** box. Alternatively, use the default, which is the computer name.
- Based on your planning estimates, type the appropriate number in the **Number of users** box.

- By default, **Place all chunk files in the same folder** is selected. Keep this setting if you want all chunk files to be stored in the same directory. Otherwise, clear this check box. For more information, see "Installation Area Minimum Configuration" in the worksheet in "Main and additional Windows server space planning" on page 17.

  To learn more about chunk files, see "Create the Database Server" in the *Telelogic Synergy Administration Guide for Windows*.

- If you are running the installation program as the CM Administrator, and you have selected the **Create database server** check box, you can choose to have the installation program automatically create a training database for you. Select **Unpack Training database** if you want a training database.

  The training database will be created in the path `\\`*computername*`\ccmdb\training`, where *computername* is the name of the computer on which you are installing. The installation program will create and share the `ccmdb` directory if it does not already exist.

16. Click **Next** to display the **Create Database Server Information** dialog box.

If you are creating a database server (specified in step 15), a message appears telling you that server creation will overwrite the existing `onconfig` file, `SQLHOSTS` registry entry, or Informix database chunk files. Click **Yes** to display the **Create Database Server Information** dialog box.

17. If you selected **Place all chunk files in the same folder** in step 15, follow the instructions in "To store chunk files in the same folder" on page 37. Otherwise, follow the instructions in "To store chunk files in separate folders" on page 38.

If you are unsure how to allocate space for the chunk files, refer to "Disk space considerations" on page 21.

Caution After you create a chunk file in a database server, do not move it. If you do, the database server will no longer work, and you may lose data.

To store chunk files in the same folder

    a. In the **Create Database Server Information** dialog box, accept the default location of `drive:\ifmxdata\,` or use the **Browse** button to specify a different location.
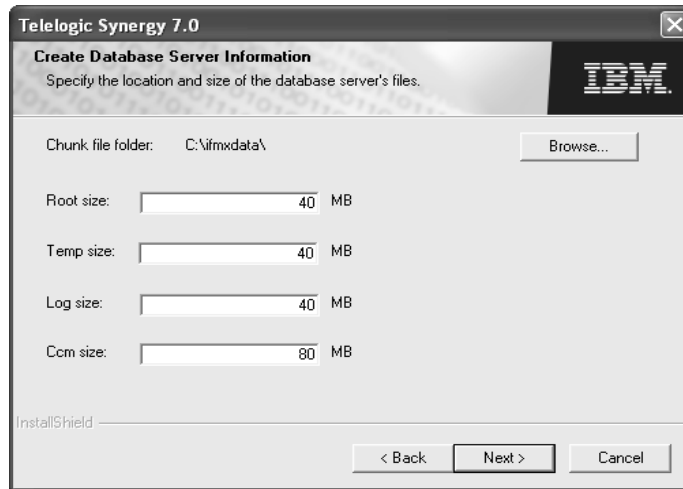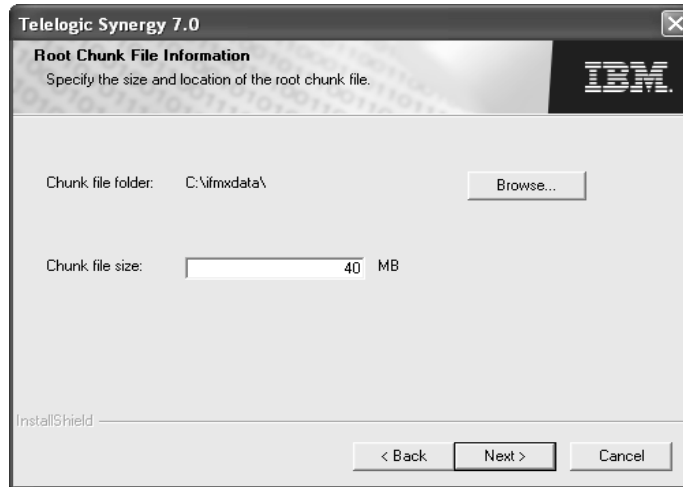

    b. Type the sizes of the dbspaces in the following boxes: **Root size**, **Temp size**, **Log size**, and **Ccm size**.

        To learn how to calculate the sizes for each dbspace, see "Create the Database Server" in the *Telelogic Synergy Administration Guide for Windows.*

    c. Click **Next** to display the **Telelogic Synergy UNIX Server Connection** dialog box. Proceed to step 18 on page 41.

To store chunk files in separate folders

a. In the **Root Chunk File Information** dialog box, accept the default location of *drive*:\ifmxdata\, or use the **Browse** button to specify a different location.
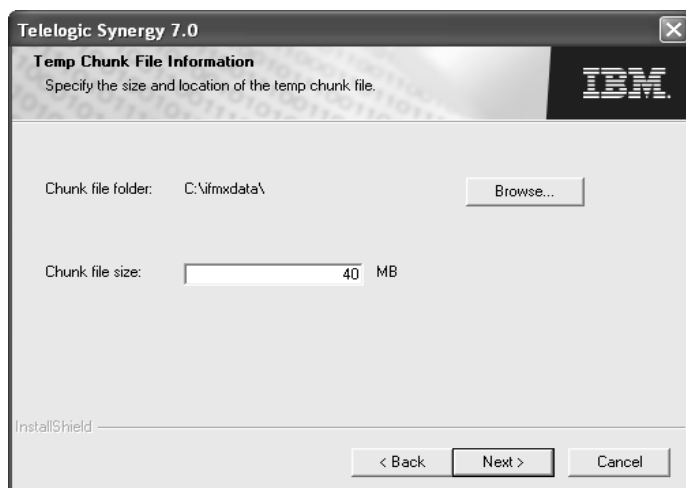

b. If you need to change the default, type a chunk file size in the **Chunk file size** box.

   To learn how to calculate any of the four (4) dbspace sizes (that is, rootdbs, tempdbs, log, and ccm), see "Create the Database Server" in the *Telelogic Synergy Administration Guide for Windows*.
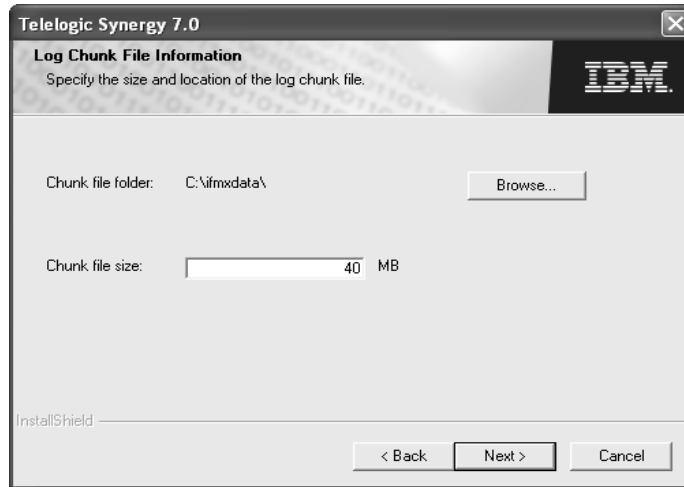
c. Click **Next** to display the **Temp Chunk File Information** dialog box.

Note If chunk files already exist in a specified directory, a Warning dialog box appears telling you that these files will be overwritten.
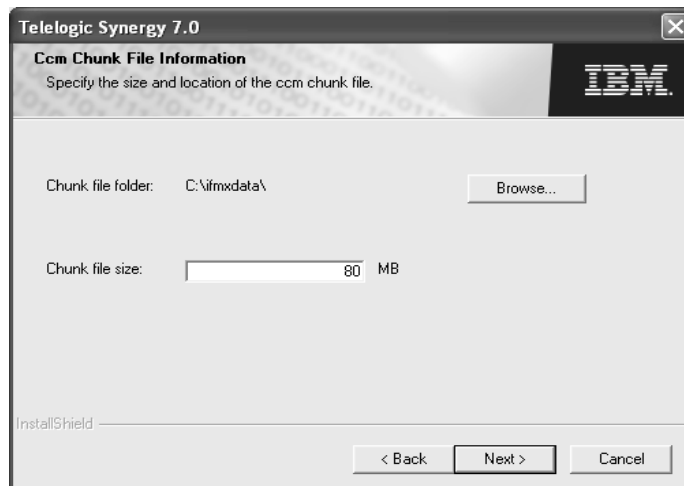

d. In the **Temp Chunk File Information** box, accept the default location of *drive*:\ifmxdata\, or use the **Browse** button to specify a different location.

**e.** If you need to change the default, type a chunk file size in the **Chunk file size** box.

f. Click **Next** to display the **Log Chunk File Information** dialog box.

g. In the **Log Chunk File Location** dialog box, accept the default location of *drive*:\ifmxdata\, or use the **Browse** button to specify a different location.

h. If you need to change the default, type a chunk file size in the **Chunk file size** box.

i. Click **Next** to display the **Ccm Chunk File Information** dialog box.

j. In the **Ccm Chunk File Location** box, accept the default location of `drive:\ifmxdata\`, or use the **Browse** button to specify a different location.

k. If you need to change the default, type a chunk file size in the **Chunk file size** box.

l. You are now finished configuring the chunk files to be stored in separate directories.

18. Click **Next** to open the **Connect to UNIX Telelogic Synergy Server** dialog.
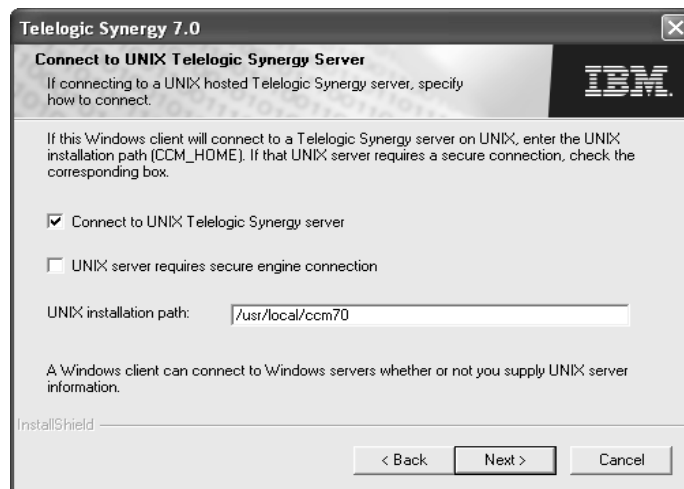
a. If you will connect the client to a UNIX server, select **Connect to UNIX Telelogic Synergy Server**. Otherwise, clear this check box.

b. If you selected **Connect to UNIX Telelogic Synergy Server**, specify whether a secure connection is to be used.

c. If you selected **Connect to UNIX Telelogic Synergy Server**, type the UNIX installation path in the **CCM_HOME** box.

- If the **License Information** dialog box appears, select the appropriate license option:
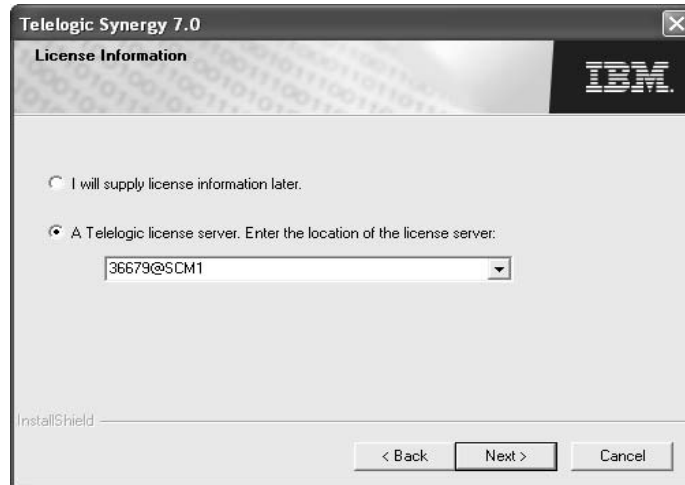
For more information on obtaining license information, see "Obtaining a license" on page 22.

19. Click **Next** to display the **Start Copying Files** dialog box.

    a. Scroll through the **Current Settings** list to view your setup. If you need to change any settings, click **Back** until you arrive at the dialog box where you need to make the change. After you make the change, click **Next** until you return to the **Start Copying Files** dialog box.

    b. When all of your settings are correct, click **Next**.

    A progress indicator window will appear in the middle of the screen while the files are being loaded onto your system.

    If you see a dialog box instructing you to restart after the installation program has finished running, follow the instructions in the dialog box to complete your installation. The installation program determines whether you need to restart.

20. Click **Finish**. The Telelogic Synergy main Windows server installation is complete.

    Note that all setup information is written to a log file. For example,
    `C:\Documents and`

```
Settings\user\%appdata%\Telelogic\Telelogic Synergy
7.0 install.log.
```

where `%appdata%` is the Windows application data directory.

You can unpack a database, then start a Telelogic Synergy session as the CM administrator. However, until you add users, including yourself, to the Telelogic Synergy database, you cannot use the database.

If you selected the option to create a training database, you can use the desktop shortcut **Training for Telelogic Synergy 7.0** to start a session on that database. You (the CM Administrator) are a user of the training database, but if you would like another user to use it, you must add that user to the database.

Instructions for unpacking a database, adding users to a database, and starting a Telelogic Synergy session are in the *Telelogic Synergy Administration Guide for Windows.*

Where to go from here

To install an additional server, see "Install an additional Windows server" on page 44.

To perform a custom installation, see "Perform a custom installation" on page 57.

To install a compact client, see "Install the compact client" on page 64.

To install clients for multiple Telelogic Lifecycle Solutions, see the installation media.

Guidelines for the automated update process

After the main Windows server installation is complete, users can install the Telelogic Synergy client. The CM administrator should send mail to all users informing them that they should install the client, and providing the URL to the Windows client installation image.

Install an additional Windows server

The following instructions describe how to install an additional Windows server, which includes the compact client, engine, database server, administrative tools, and object registrar.

Note In order to install a Windows Server, you must be licensed to use Telelogic Synergy on Informix.

The main reason for installing an additional server is resource allocation. An additional database server allows databases to grow separately. For example, if your company is large, but only one group within it is using Telelogic Synergy, you can create one database in which all source code, documentation, and testing objects reside. Later, when your company decides that Telelogic Synergy is the right tool for all your projects, you can create one database for source code, one for documentation, and another for testing. Moreover, you could use a separate server for each database.

You must satisfy the following requirements before installing an additional Windows server.

User Requirements: Member of local Administrators group

Permission to write to a local NTFS file system partition

Active Directory user

OS Requirements: See Readme or Telelogic Synergy Support site

Prerequisites: You must have already installed a main Windows server.

The `%windir%\System32\drivers\etc\services` file must be writable and you must be logged on to domain. `%windir%` is the Windows installation directory.

Note You must install the main server and any additional servers in a domain environment.

To install an additional Windows server, perform the following steps.

1. Log on to the Windows domain.

2. Start the Telelogic Synergy installer.

    • If you are installing from a DVD, insert the DVD that contains the Telelogic Synergy Windows Server in the DVD drive. On the Windows taskbar, right-click the **Start** button to display a shortcut menu. Click **Explore** to open Windows Explorer. Navigate to `DVD_drive:\win_servers\synergy_server`, and double-click `setup.exe` to display the **Welcome** dialog box.

- If you are installing from a download, double-click `synergy70.exe` to display the **Welcome** dialog box.

Note If you already have an installation of Telelogic Synergy or an installation of Informix, a warning dialog box will appear. If you choose to continue, the new installation will overwrite the current installation.

3. Click **Next** to display the **License Agreement** dialog box. Review and accept the terms of the license agreement.

4. Click **Next** to display the **Choose Destination Location** dialog box. You can accept the default installation location, or click **Browse** to specify a different location.

5. Click **Next** to display the **Setup Type** dialog box.

   If you **are** a domain user and a member of the local Administrators group, the **Setup Type** dialog box appears.


6. In the **Setup Type** dialog box, click the **Additional Server** button.

7. In the **informix Password** dialog box, type the *informix* user password in the **Password** box, and type it again in the **Confirm Password** box.

8. Click **Next** to display the **Telelogic Synergy Main Windows Server Information** dialog box.

In the **Main Windows Server Information** dialog box, type the name of the computer that will be your main Telelogic Synergy database server.
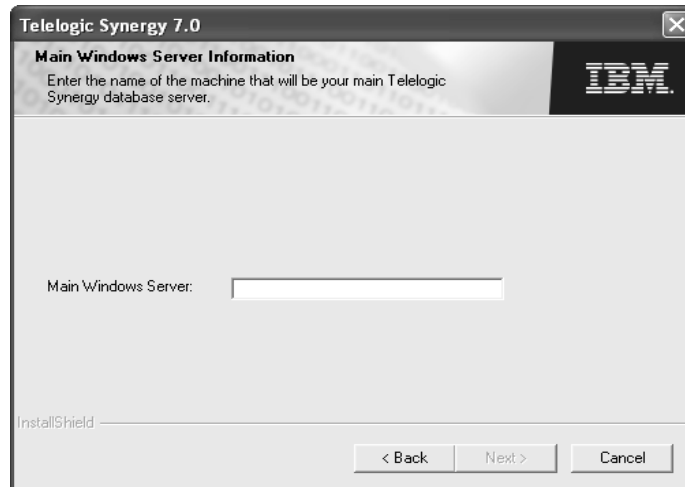

9. Click **Next**, and do one of the following, as directed:

   • If the **Telelogic Synergy Router Information** dialog box appears, proceed to step 10.

   • If the **Informix Information** dialog box appears, the installation program has determined the router port number from the main server computer. Skip to step 11b.

   • If the **Informix Database Server Information** dialog box appears, the installation program has determined the router port number from the main server computer, and has also determined the *informix* port number. Skip to step 13.

10. If necessary, type the router host name and the router port number in the appropriate boxes. By default, the port number that the Telelogic Synergy router uses is 5412. The port number must be the same as the port number

specified on the router computer. By default, the router computer is the main server.
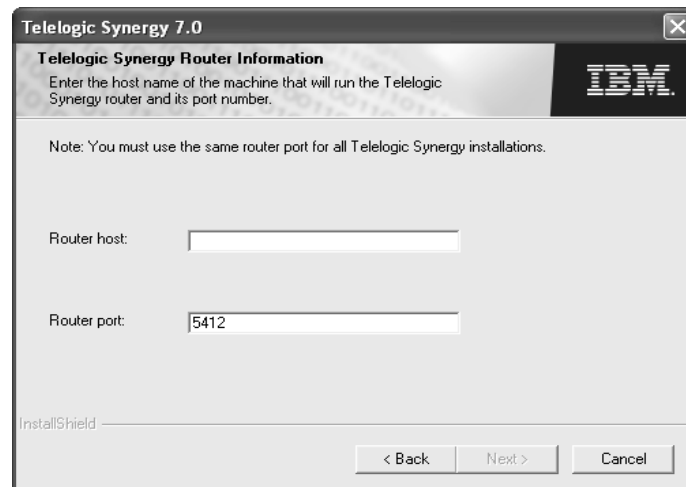

11. Click **Next**, and do one of the following, as directed.

   a. If the **Informix Information** dialog box does not appear, the installation program has determined the *informix* port number. Skip to step 13.

b. In the **Informix Information** dialog box, if the default port number that Informix uses (1526) is already in use, type a different port number in the **Informix Port** box. If you are not certain that port number 1526 is available, look in your Services file, which is located in the `%windir%\System32\drivers\etc\services` directory. For more information, see "Check the services file" on page 22.
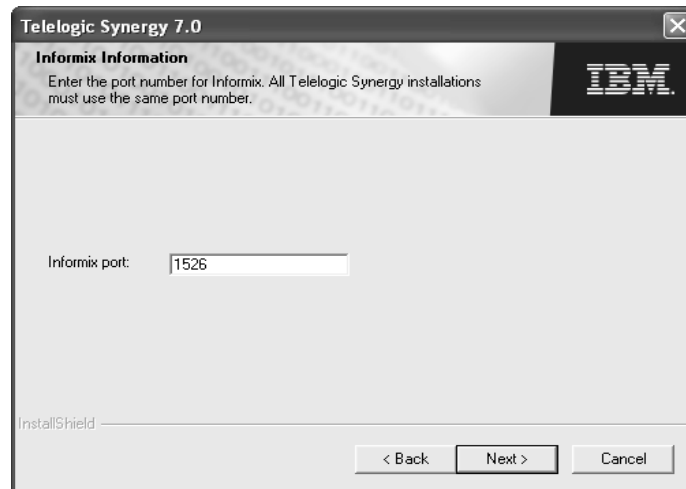
12. Click **Next** to display the **Informix Database Server Information** dialog box.

13. Configure the **Informix Database Server Information** dialog box.
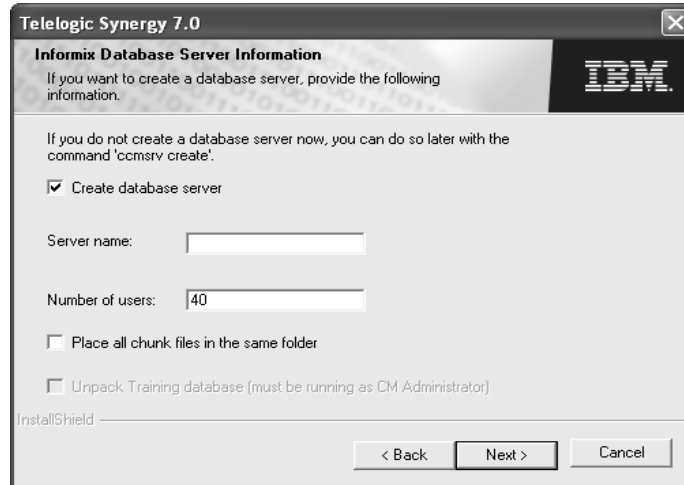
The default settings in the database server dialogs are only suggestions. You should configure these dialogs based on your planning estimates in "Main and additional Windows server space planning" on page 17. If you have not completed that section, do so before filling in these dialogs.

• If you are upgrading from a previous Telelogic Synergy release on the same computer, **do not** select **Create Database Server**. In all other cases, select this check box.

  If you do not select **Create Database Server**, you will install the new Informix software, but you will not create a new database server.

Caution If you are upgrading from a previous Telelogic Synergy release on the same computer and you select **Create a Database Server**, your old chunk files may be overwritten. This may result in loss of data. For more information, see the upgrade instructions relevant to your current installation. These instructions are available as explained in "Upgrade from a previous release" on page 1.

• If you are creating a database server, type its name in the **Server Name** box. Alternatively, use the default, which is the computer name.
• Based on your planning estimates, type the appropriate number in the **Number of users** box.

- By default, **Place all chunk files in the same folder** is selected. Keep it if you want all chunk files to be stored in the same directory. Otherwise, clear this check box. For more information, see "Installation Area Minimum Configuration" in the worksheet in "Main and additional Windows server space planning" on page 17.

  To learn more about chunk files, see "Create the Database Server" in the *Telelogic Synergy Administration Guide for Windows.*

14. Click **Next** to display the **Create Database Server Information** dialog box.

    Note If you are creating a database server (as shown in step 13), a message appears telling you that server creation will overwrite the existing onconfig file, SQLHOSTS registry entry, or Informix database chunk files. Click **Yes** to display the **Informix Database Server Information (2)** dialog box.

15. If you selected to **Place all chunk files in the same folder** in step 13, and you are unsure how to allocate space for the chunk files, follow the instructions in "Disk space considerations" on page 21.

    Caution After you create a chunk file in a database server, do not move it. If you do, the database server will no longer work, and you may lose data.

To Place Chunk Files in the Same Folder

a. In the **Create Database Server Information** dialog box, accept the default location of *drive*:\ifmxdata\, or use the **Browse** button to specify a different location.
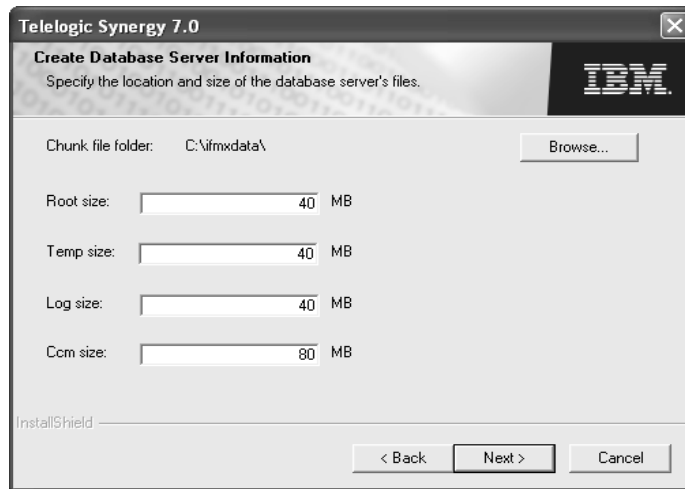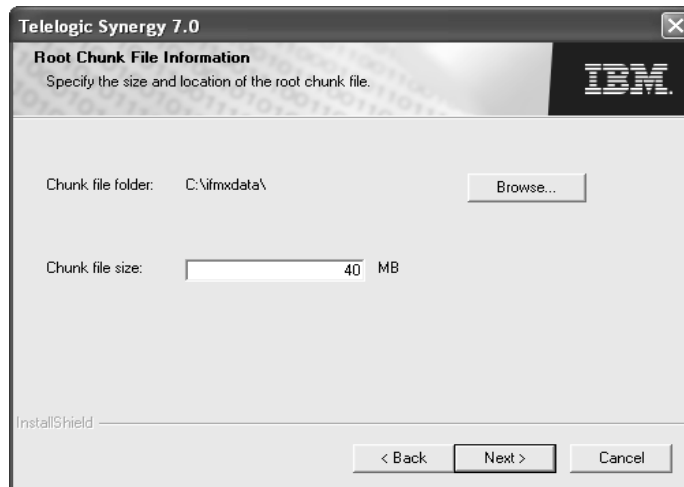

b. If you need to change the defaults, type the size of the dbspaces in the following boxes: **Root size**, **Temp size**, **Log size**, and **Ccm size**.

To learn how to calculate the sizes for each dbspace, see "Create the Database Server" in the *Telelogic Synergy Administration Guide for Windows*.

c. Click **Next** to display the **Connect to UNIX Telelogic Synergy** dialog box. Proceed to step 16 on page 55.

To Store Chunk Files in Separate Folders

a. In the **Root Chunk File Information** dialog box, accept the default location of `drive:\ifmxdata\,` or use the **Browse** button to specify a different location.

Caution After you create a chunk file in a database server, do not move it. If you do, the database server will no longer work, and you may lose data.
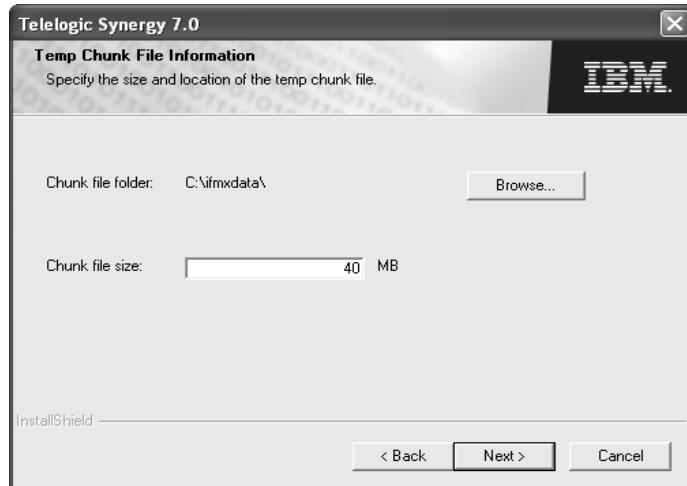

b. If you need to change the default, type a chunk file size in the **Chunk file size** box.

To learn how to calculate any of the four (4) dbspace sizes (that is, `rootdbs`, `tempdbs`, `log`, and `ccm`), see "Create the Database Server" in the *Telelogic Synergy Administration Guide for Windows.*
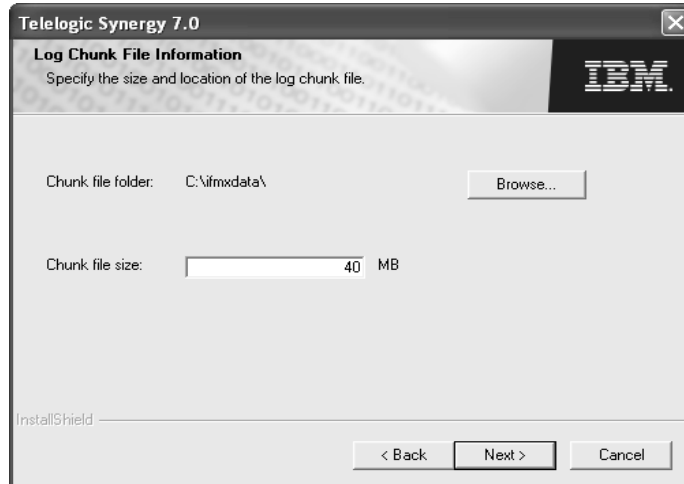
c. Click **Next** to display the **Temp Chunk File Information** dialog box.

Note If chunk files already exist in a specified directory, a Warning dialog box appears telling you that these files will be overwritten.

d. In the **Temp Chunk File Information** box, accept the default location of *drive*:\ifmxdata\, or use the **Browse** button to specify a different location.

**e.** If you need to change the default, type a chunk file size in the **Chunk file size** box.

f. Click **Next** to display the **Log Chunk File Information** dialog box.

g. In the **Log Chunk File Information** dialog box, accept the default location of *drive*:\ifmxdata\, or use the **Browse** button to specify a different location.

h. If you need to change the default, type a chunk file size in the **Chunk file size** box.

i. Click **Next** to display the **Ccm Chunk File Information** dialog box.

j. In the **Ccm Chunk File Location** box, accept the default location of `drive:\ifmxdata\`, or use the **Browse** button to specify a different location.

k. If you need to change the default, type a chunk file size in the **Chunk file size** box.

l. You are now finished configuring the chunk files to be stored in separate directories. Click **Next** to display the **Telelogic Synergy UNIX Server Connection** dialog box.

16. If you are connecting the client to a UNIX server, select **Connect to a UNIX Telelogic Synergy server**. Otherwise, clear this check box.

If you selected **Connect to a UNIX Telelogic Synergy server** in step 16, type the UNIX installation path (e.g., `/usr/local/ccm70`) in the **CCM_HOME** box. Otherwise, ignore this box.

17. If the **License Information** dialog box appears, select the appropriate license option.
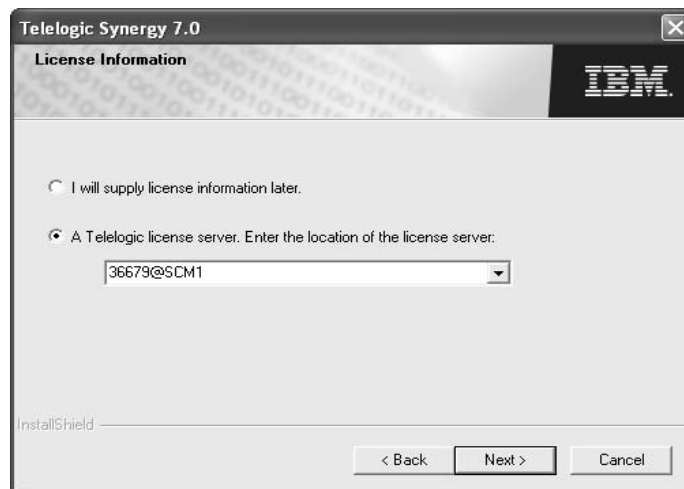
For more information on obtaining license information, see "Obtaining a license" on page 22.

18. Click **Next** to display the **Start Copying Files** dialog box.

a. Scroll through the **Current Settings** list to view your setup. If you need to change any settings, click **Back** until you arrive at the dialog box

where you need to make the change. After you make the change, click **Next** until you return to the **Start Copying Files** dialog box.

b. When all of your settings are correct, click **Next**.

A progress indicator window will appear in the middle of the screen while the files are being loaded onto your system.

If you see a dialog box instructing you to restart after the installation program has finished running, follow the instructions in the dialog box to complete your installation. The installation program determines whether you need to restart.

19. Click **Finish**. The Telelogic Synergy additional Windows server installation is complete.

Note that all setup information is written to a log file,
`C:\Documents and Settings\`*user*`\Application Data\Telelogic\Telelogic Synergy 7.0 install.log`.

You can unpack a database, then start a Telelogic Synergy session as the CM administrator. However, until you add users, including yourself, to the Telelogic Synergy database, you cannot use the database.

Instructions for unpacking a database, adding users to a database, and starting a Telelogic Synergy session are in the *Telelogic Synergy Administration Guide for Windows.*

Where to go From here

To perform a custom installation, see "Perform a custom installation" on page 57.

To install the compact client, see "Install the compact client" on page 64.

To install clients using the master installer, see the *Readme* file on the `win_clients` section of the DVD.

Guidelines for the automated update process

After the additional Windows server installation is complete, users can install the Telelogic Synergy client. The CM administrator should send mail to all users informing them that they should install the client, and providing the URL to the Windows client installation image.

Perform a custom installation

A custom installation lets you choose which Telelogic Synergy components you want to install. Only advanced users should use this option. If you do not know which components go together, use the prepackaged options from the **Installation Type** dialog box.

Note You may install only one main server per installation site. In order to install a Windows Server, you must be licensed to use Telelogic Synergy on Informix.

You must satisfy the following conditions before you can perform a custom installation.

User Requirements: Administrator privileges to install all components except the compact client

Permission to write to a local NTFS file system partition to install the main and additional Windows servers

Permission to write to a local partition for all components

Active Directory user

OS Requirements: See Readme or Telelogic Synergy Support web site

Prerequisites: The `%windir%\System32\drivers\etc\services` file must be writable to install all components except the compact client. `%windir%` is the Windows installation directory.

You must be logged on to a domain to install any components, except the compact client.

Note You can install the compact client on a domain, workgroup, or local computer.

To perform a custom installation, perform the following steps.

1. Log on to the Windows domain, as appropriate.

2. Start the Telelogic Synergy installer.

   • If you are installing from a DVD, insert the DVD that contains the Telelogic Synergy Windows Server in the DVD drive. On the Windows taskbar, right-click the **Start** button to display a shortcut menu. Click **Explore** to open Windows Explorer. Navigate to `DVD_drive:\win_servers\synergy_server`, and double-click `setup.exe` to display the **Welcome** dialog box.

- If you are installing from a download, double-click `synergy70.exe` to display the **Welcome** dialog box.

3. Click **Next** to display the **User License Agreement** dialog box. Review and agree to the terms of the license agreement.

4. Click **Next** to display the **Setup Type** dialog box. Click **Custom**.

5. Click **Next** to display the **Select Features** dialog box.
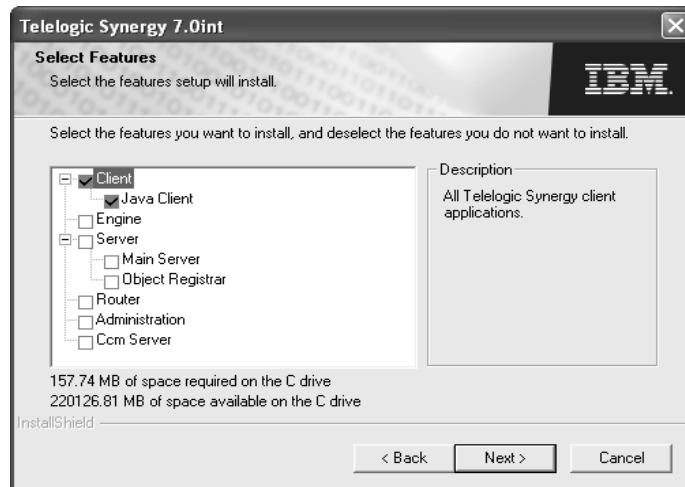
6. Choose the options that you want to install. Note that the install dependencies are designated using a hierarchy listing; in other words, logical installation pieces are grouped for you.

7. Deselect the components you do not want to install. Compare the required space with the space available to ensure you have enough room to install the components.

Be sure that you understand your combination of options to avoid installing unnecessary components.

For example, you will probably never have reason to install only the Administration Server. However, you would select all of these options if you were installing a main Windows server.

Alternatively, you might install the Engine component on a system that will be used as an additional engine server, if your Telelogic Synergy Server system is overloaded with too many users' engine processes. See "Custom installation example: engine" on page 59.

Custom installation example: engine

Note This is one example of a valid custom installation. You may
use other options.

To install an engine as a custom installation, do the following:

1. In the **Custom Options** dialog box, select only **Engine**. Clear all other
check boxes.

2. Click **Next** to display the **Main Windows Server Information** dialog box.

3. In the **Main Windows Server** box, type the name of the computer that will
be your Telelogic Synergy server.

4. Click **Next**, and do one of the following, as directed:

   • If the **Telelogic Synergy Router Information** dialog box appears, skip
   to step 5.
   • If the **Ccm Server Information** dialog box appears, skip to step 8.
   • If the **Informix Port Information** dialog box appears, the installation
   program has determined the router port number from the main server
   computer. Skip to step 7.
   • If the **Start Copying Files** dialog box appears, the installation program
   has determined the router port number from the main server computer,
   and has also determined the *informix* port number. Skip to step 10.

5. If necessary, type the router host name and the router port number in the
appropriate boxes.

6. By default, the port number that the Telelogic Synergy router uses is 5412.
The port number must be the same as the port number specified on the
router computer. By default, the router computer is the main server.

7. Click **Next**, and do one of the following, as directed.

   • If the **Ccm Server Information** dialog box appears, proceed to step 8.
   • If the **Informix Port Information** dialog box appears, skip to step 8.
   • If the **Start Copying Files** dialog box appears, the installation program
   has determined the *informix* port number. Skip to step 10.

8. The **Ccm Server Information** dialog box enables you to change the server
port number. The CCM server is a Web server that serves online help pages
for all Telelogic Synergy GUI sessions, both Web mode and traditional
mode. Telelogic Synergy requires a primary server, which runs on the router
host system.

If the default server port number (8400) is already in use, change the port number in the **Server port** box. If you are not certain that port number 8400 is available, look in your Services file, which is located in the `%windir%\System32\drivers\etc\services` directory. For more information, see "Check the services file" on page 22.

9. Click **Next** to display the **Informix Information** dialog box.

   In the **Informix Information** dialog box, if the default port number that Informix uses (1526) is already in use, type a different port number in the **Informix port** box. If you are not certain that port number 1526 is available, look in your Services file, which is located in the `%windir%\System32\drivers\etc\services` directory. For more information, see "Check the services file" on page 22.

   Click **Next** to display the **Start Copying Files** dialog box.

10. In the **Start Copying Files** dialog box, scroll through the **Current Settings** list to view your setup. If you need to change any settings, click **Back** until you arrive at the dialog box where you need to make the change. After you make the change, click **Next** until you return to the **Start Copying Files** dialog box.

11. Click **Next**.

    A progress indicator window presents the progress of the installation.

    When the files have been loaded, the **InstallShield Wizard Complete** dialog box appears.

12. Click **Finish**. The Telelogic Synergy engine installation is complete. Now, this computer can be run the engine locally, or can be used as an engine server for multiple users running Telelogic Synergy clients on other computers.

    Note All setup information is written to a log file,
    ```
    Documents and
    Settings\user\%appdata%\Telelogic\Telelogic
    Synergy 7.0 install.log.
    ```

After you install the server software...

Use automatic update to update client installations

You can automatically push updates to client installations of the same release. After you have updated the main server, for example, with a patch, you can force users to update their client installations to the same version of the product.

When the user starts Telelogic Synergy on Windows, the user is notified that an update to the product is required. The following occurs:

- If the user chooses to update, the update installer is downloaded from the server, and launched. When the update is complete, the user can restart the client.

- If the user chooses not to update, the user receives a message that the client cannot be started because it is a different version from the server.

When the user starts Telelogic Synergy in `-nogui` mode on Windows, the user is notified that an update to the product is required. The client cannot continue, and the update must be installed manually.

6 *Client Installation*

After a Telelogic Synergy Windows server has been installed on your network, you can install a Telelogic Synergy client.

Telelogic Synergy client installation

Users can install a Telelogic Synergy Windows client in the following ways:

- Install from the URL provided by the CM administrator. See "Client Installation" on page 63.

- Install a compact client. See "Install the compact client" on page 64.

- Install multiple Telelogic Synergy clients from the Telelogic Lifecycle Solutions media.

Guidelines for the automated update process

After the main Windows server installation is complete, users can install the Telelogic Synergy client. The CM administrator should send mail to all users informing them that they should install the client, and providing the URL to the Windows client installation image.

Install the compact client

You can install the compact client on a domain, workgroup, or local computer. The compact client installation includes the Telelogic Synergy and Telelogic Synergy Classic interfaces.

You must satisfy the following conditions before installing the compact client.

User Requirements: Member of local Administrators group

OS Requirements: Windows 2003 Server, or
                           Windows XP Professional Service Pack 2

Prerequisites: None

Note Before you install the Telelogic Synergy Windows client
          software, be sure that TCP/IP Protocol Support is installed
          and activated. Windows systems are shipped with this
          protocol.

The compact client is installed if you are using either the downloadable installation feature or the automatic update feature. In order to start the download, you must provide a URL that identifies the Telelogic Synergy CCM Server, as this is where the installation is launched. The CCM server is a Web server that serves online help pages for all Telelogic Synergy GUI sessions, both Web mode and traditional mode. The URL has the format `http://`*`hostname`*`:`*`port_number`*`/install.html,` where

> *hostname*   is the hostname of the computer where the server
>   is installed, and
> *port_number* is the port number of the server.

The CM administrator will need to provide the URL to users who will be performing the compact client installation via download. If users are updating their client installations after the Windows server has been updated, the connection will be made automatically. For more information about automatic updates, see "Use automatic update to update client installations" on page 61.

To install the compact client, perform the following steps.

1. Log on to the Windows domain.

2. Start the Telelogic Synergy installer.

    •   If you are installing from a DVD, insert the DVD that contains the
        Telelogic Synergy Windows Server in the DVD drive. On the Windows
        taskbar, right-click the **Start** button to display a shortcut menu. Click
        Explore to open Windows Explorer. Navigate to

DVD_drive:\win_clients\synergy, and double-click
setup.exe to display the **Welcome** dialog box.

- If you are installing from a download, double-click synergy70.exe to
  display the **Welcome** dialog box.

- If you are installing from a web location, enter the URL of the
  installation web page, which will have the format of:
  http://$hostname$:$port\_number$/install.html.

3. Click **Next** to display the **License Agreement** dialog box. Review and
   accept the terms of the license agreement.

4. Click **Next** to view the **Setup Type** dialog box. If you install from the URL
   provided by the CM administrator, you will not see this dialog; skip to step 5.

5. Click the **Compact Client** button to display the **Telelogic Synergy Router
   Information** dialog box.
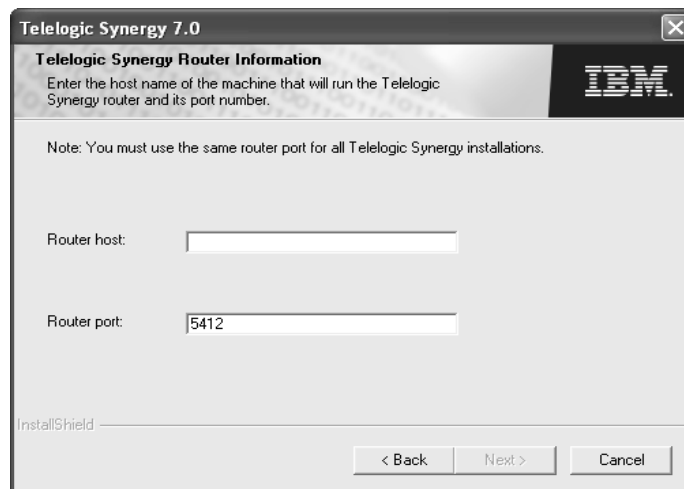
In some cases, the installation program can get the router port number from
the main server computer.

6. If you need to change the defaults, type the router host name and router port
   number in the appropriate boxes.

   The router host is usually the name of the computer that contains the
   Telelogic Synergy main Windows server, but it may also be a UNIX
   computer. By default, the port number that the Telelogic Synergy router uses

is 5412. If the installed router uses a different port number, type that number in the **Router Port** box.

If you are not certain which port number to use, look in the `%windir%\System32\drivers\etc\services` directory on the Windows router computer, or the `/etc/services` directory on the UNIX computer. For more information, see "Check the services file" on page 22.

> **Note** You must use the correct router port and ensure that it is the same as the server's.

7. Click **Next** to display the **Connect to UNIX Telelogic Synergy Server** dialog box.
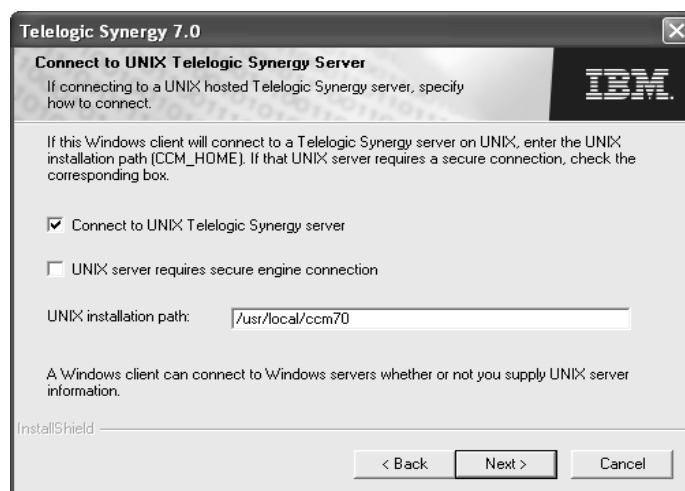
8. Update the **Connect to UNIX Telelogic Synergy Server** dialog box.

   a. If you will connect the client to a UNIX server, select **Connect to UNIX Telelogic Synergy Server**. Otherwise, clear this check box.

   b. If you selected **Connect to UNIX Telelogic Synergy Server**, specify whether a secure connection is to be used.

   c. If you selected **Connect to UNIX Telelogic Synergy Server**, type the UNIX installation path in the **CCM_HOME** box.

9. Click **Next** to display the **Start Copying Files** dialog box.

10. Scroll through the **Current Settings** list to view your setup. If you need to change any settings, click **Back** until you arrive at the dialog box where you

need to make the change. After you make the change, click **Next** until you return to the **Setup Summary** dialog box.

11. When all of your settings are correct, click **Next**.

   A progress indicator window presents the progress of the installation. When the files have been loaded onto your system, the **InstallShield Wizard Complete** dialog box appears.

12. If you do not want to create a shortcut on your desktop, clear the check box, otherwise, click **Finish**. The Telelogic Synergy typical client installation is complete.

   View the README file anytime after the installation is complete: On the Windows taskbar, click **Start > All Programs > Telelogic > Telelogic Lifecycle Solutions Tools > Telelogic Synergy 7.0 > Read Me**. This path assumes that you used the default program folder during your installation.

You can start a Telelogic Synergy session, provided you are a valid user in the database. If you have problems starting a session, consult your CM administrator.

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