



Installation Guide

Updated August, 2016

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Overview

Notes for this Document

- **Installation of RMTrack** is generally a quick and simple task. Following the on-screen instructions during installation and using the defaults allows most users to install the application in most environments.
- **This document is designed** to supplement the on-screen instructions and to give more in depth information to System, Network, and Database Administrators.
- **RMTrack also offers a Hosted version** (SaaS model) of the issue tracking application. Please contact sales@rmtrack.com for more information.
- **Please report** any errors or discrepancies you may find in this document to support@rmtrack.com your assistance is appreciated.

A Note from RMTrack Support

RMTrack offers full pre and post-sale support for our application. We are happy to answer any questions you have and offer any assistance required to introduce you to the application and to assist with installing and configuring RMTrack to meet your specific needs.

RMTrack Support has years of experience in a variety of businesses and have assisted in the configuration of hundreds of RMTrack installations.

Please call or e-mail RMTrack Support to request assistance, guidance, on-line meetings ... anything you need to get the most from RMTrack.

Install Executable

The RMTrack application is installed using a downloadable install executable called: **rmtrackv9.9.9.exe** or **rmtrackv9.9.9-x64.exe**. The **v9.9.9** is the version number (see the section on Upgrading for more information). The **-x64** denotes the 64-bit version of RMTrack.

The current version of RMTrack is available from: www.rmtrack.com/downloads.

The same installer is used for first-time installations and for upgrading existing RMTrack installations to the current version.

System Requirements for Local Installation

Application (Web) Server

RMTrack is based on Microsoft Windows technology and requires one of the following MS Windows Servers to run the application:

- Windows Server 2016
- Windows Server 2012 R2
- Windows Server 2012
- Windows Server 2008 R2
- Windows Server 2008

RMTrack supports both 32-bit (Win2008) and 64-bit operating systems

Memory: 512MB RAM

Hard disk: 60MB (for installation)

Clients may also want to consider using disk mirror (RAID1) to ensure that a single hard disk failure does not result in data loss. Some form of a tape/optical backup method is highly recommended.

Database Server

RMTrack uses a Microsoft SQL Server database.

Supported versions include:

- SQL Server 2016
- SQL Server 2014 (SP1, SP2)
- SQL Server 2012 (SP1-3)
- SQL Server 2008 R2 (SP1-3)
- SQL Server 2008 (SP1-4)
- SQL Server 2005 (SP1-4)

Database size varies depending on use, setup and number of issues. Please contact support@rmtrack.com for assistance in calculating space requirements.

The database server does not need to be installed on the same server as the RMTrack application, but it must be connected via a network.

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Browser Access

Different web browsers can be used to access the RMTrack Issue Tracking application. Current versions of Internet Explorer, Chrome, Firefox and Opera are supported.

The integrated screen capture tool is only available to IE users using the 32-bit version of IE with RMTrack ActiveX Controls installed. These are downloaded from the host server to the PC the first time a page requiring ActiveX is accessed.

E-Mail Server

RMTrack features an automatic e-mail notification service (outgoing e-mail) and the ability to monitor an e-mail address for issue creation (incoming e-mail).

Hosted installations have the choice of using the RMTrack mail server or their own, corporate e-mail server. Local installations must use your organization's e-mail server. The e-mail server must be addressable via domain name or IP address.

- Outgoing e-mail server must support SMTP standards.
- Incoming e-mail server must support POP3 or IMAP.
- RMTrack incoming and outgoing e-mail supports both SSL and TLS modes.

RMTrack Licensing

License Terms/EULA

RMTrack requires a license key to become active.

License keys are granted based on the **RMTrack End User License Agreement (EULA)**. A copy of the RMTrack EULA is available from Help on every page of the RMTrack application and from www.rmtrack.com/downloads.

The EULA must be accepted to complete the installation of RMTrack.

License Types

Floating-User licenses

Floating-user licenses are shared between users. When all floating-user licenses are in use, other users will not be able to logon. These are also known as concurrent licenses.

Named-User licenses

Named-user licenses work best for users who will be using the system regularly and require guaranteed access. These are also known as fixed licenses.

Mixed mode

RMTrack allows a combination of floating and named licenses.

Trial evaluation

The license key 1111-1111-1111-1111 will grant a 15 floating-user license for 14-days. Extended trial licenses are available by contacting RMTrack by telephone or e-mail support@rmtrack.com.

Note: Every installation of RMTrack requires separate and unique license keys.

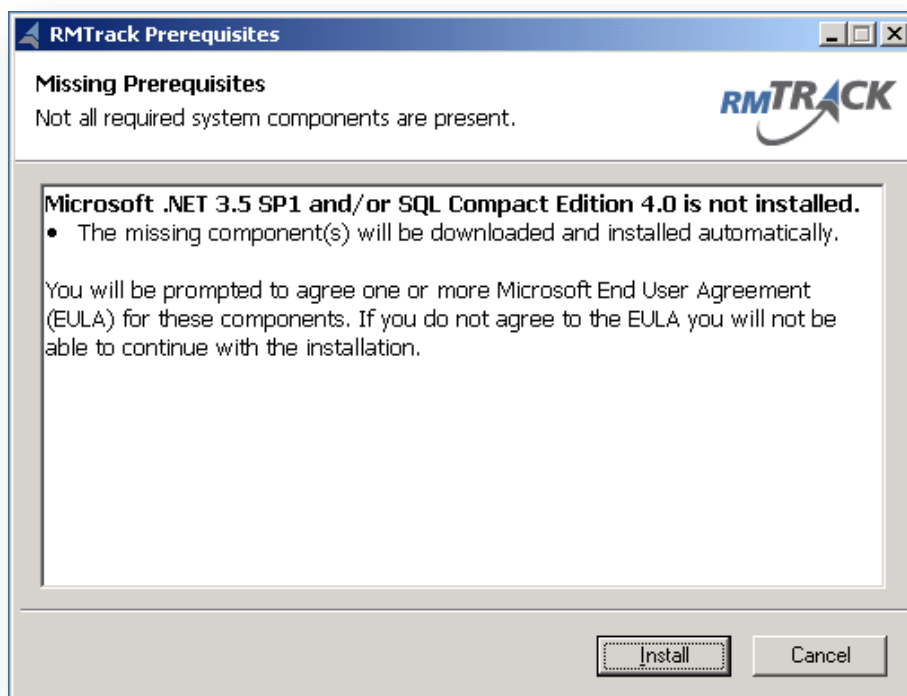
New Install

To create a new installation of RMTrack, download the Install Executable from www.rmtrack.com/downloads and run the program on your application (web) server.

The installer will create your web site and create an empty RMTrack database on your SQL Server.

Your new installation will be initialized with a trial 15-day trial license key. Once RMTrack is successfully installed you can add a permanent license key from by starting the application and going to **System > Licenses > New**.

Prerequisites

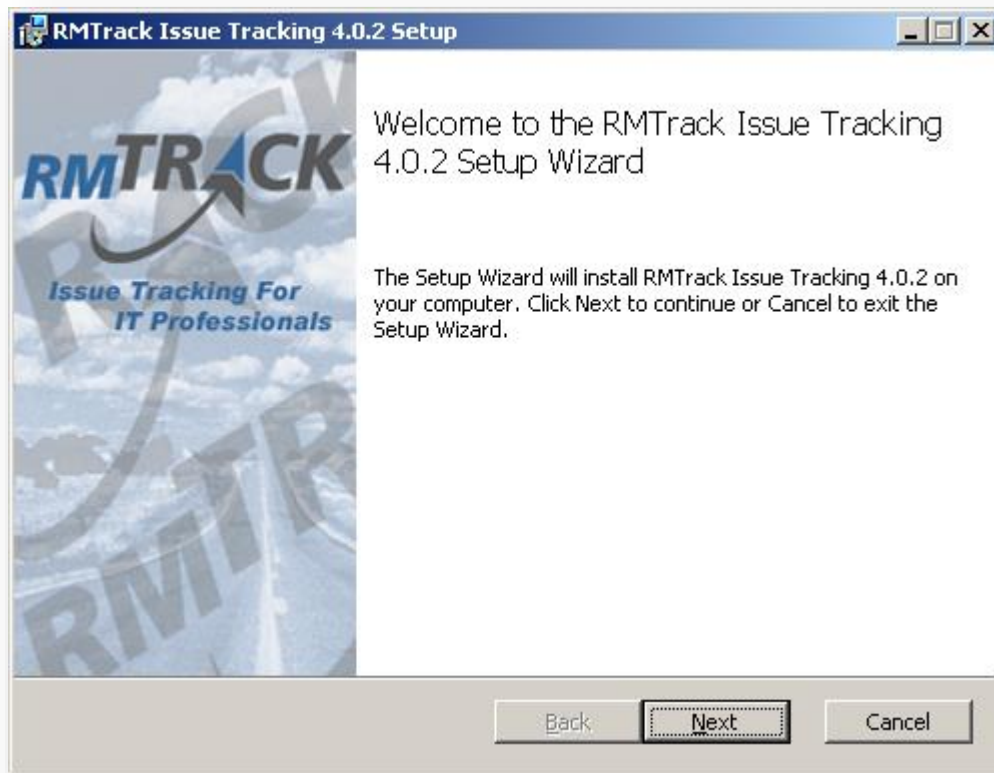


RMTrack requires that both Microsoft .NET Framework 3.5 SP1 and Microsoft SQL Compact Edition 4.0 are both installed. If either or both are missing the above screen will be displayed. Clicking the **Install** button will install the missing components.

For more information about these components or to download and install them yourself, please see:

- .NET: <http://www.microsoft.com/en-ca/download/details.aspx?id=25150>
- SQL Compact: <http://www.microsoft.com/en-us/download/details.aspx?id=17876>

Welcome Screen



This is the standard welcome screen, and it is used to inform users of what application and version they are installing (or uninstalling).

License Agreement

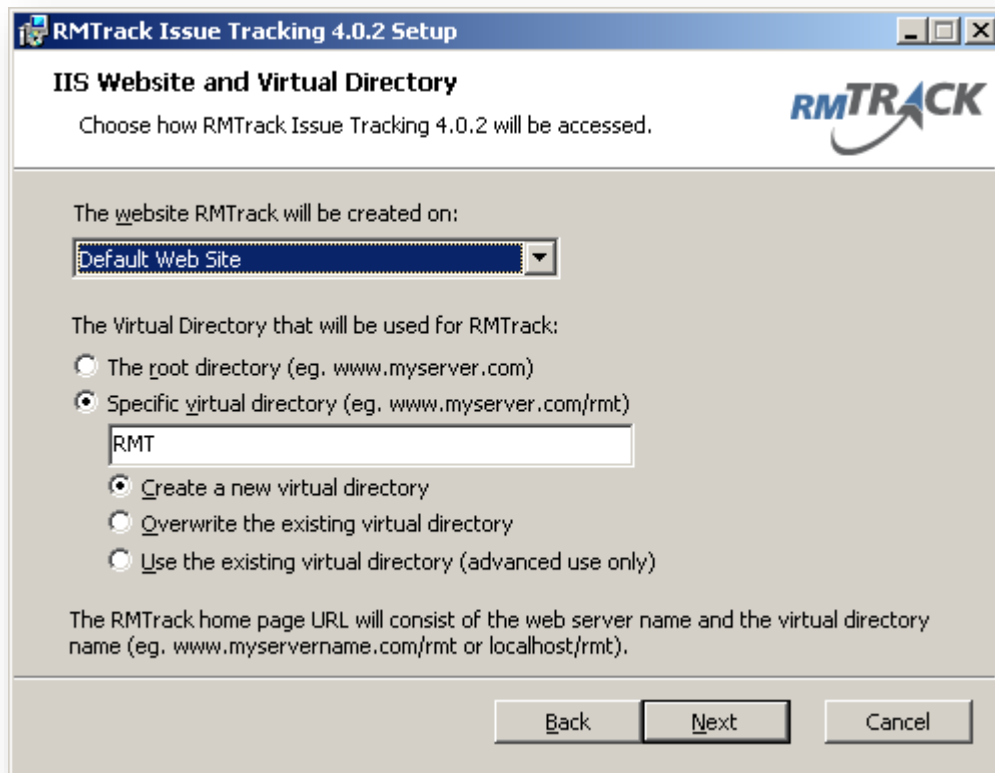


This is the RMTrack End User License Agreement (EULA). Please read it carefully.

A downloadable version of the EULA is available from www.rmtrack.com/downloads.

By checking **I accept the license agreement** and clicking the **Next** button you are agreeing to the terms of the agreement.

IIS Website and Virtual Directory



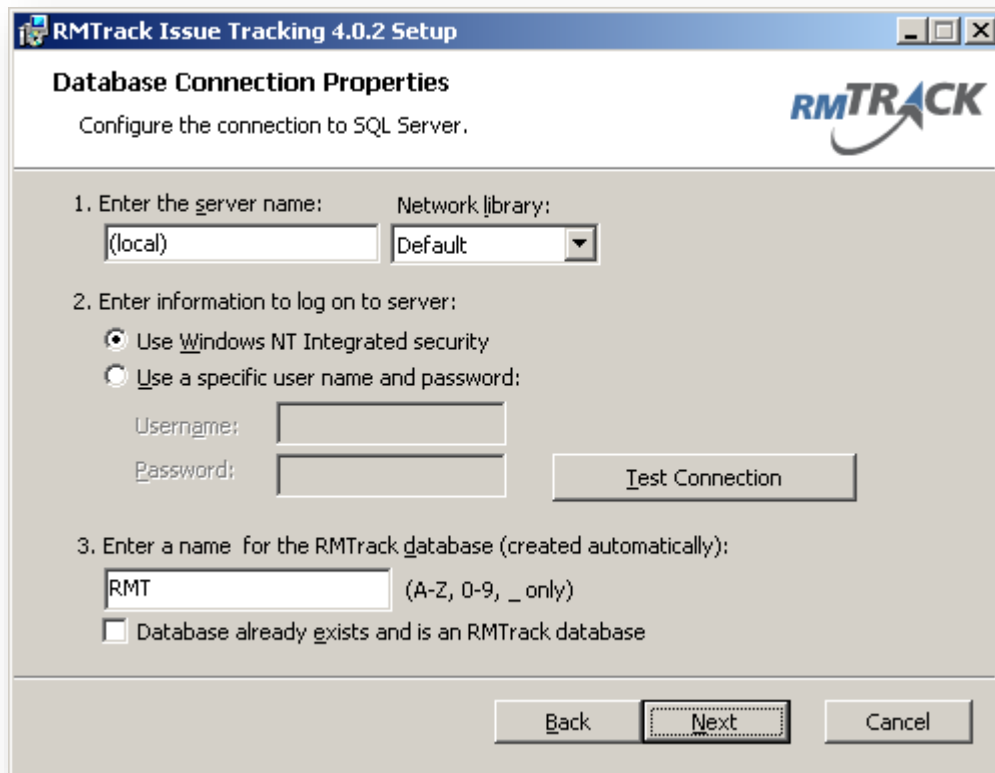
The Website and Virtual Directory dialog allows you to select what URL users will use to access RMTrack.

Typically a server has only the **Default Web Site** defined. Some servers may have additional web sites defined, and they will be listed here.

The RMTrack virtual directory can either be located at the root level, or as a specific virtual directory.

When installing as a specific virtual directory you will generally want to create a new virtual directory. The **Overwrite** and **Use existing** options are generally only required when there is a problem creating a new virtual directory on the server and support@rmtrack.com is involved.

Database Connection Properties



The screenshot shows the 'Database Connection Properties' dialog box from the RMTrack Issue Tracking 4.0.2 Setup. The dialog has a title bar with the RMTrack logo and the text 'RMTrack Issue Tracking 4.0.2 Setup'. Below the title bar, the main heading is 'Database Connection Properties' with the instruction 'Configure the connection to SQL Server.' and the RMTrack logo. The dialog is divided into three numbered sections:

- 1. Enter the server name:** A text box contains '(local)'. **Network library:** A dropdown menu is set to 'Default'.
- 2. Enter information to log on to server:** There are two radio buttons: 'Use Windows NT Integrated security' (which is selected) and 'Use a specific user name and password:'. Below the second radio button are text boxes for 'Username:' and 'Password:'. A 'Test Connection' button is located to the right of the password box.
- 3. Enter a name for the RMTrack database (created automatically):** A text box contains 'RMT'. To its right is the text '(A-Z, 0-9, _ only)'. Below this is a checkbox labeled 'Database already exists and is an RMTrack database', which is currently unchecked.

At the bottom of the dialog are three buttons: 'Back', 'Next' (which is highlighted with a dashed border), and 'Cancel'.

The database connection properties allow you to determine how RMTrack will connect to the SQL Server database.

Generally, the **Network Library** option should be left as **Default**. This allows the client components of SQL Server to determine how best to connect to the server. Some installations may require using an IP address for the server name and the TCP/IP network library (especially if there is a firewall between the web server and the SQL Server).

Database Logon Information

The logon information is used during the installation to create and do the initial population of the database. After installation, RMTrack will use this same logon information whenever it connects to the SQL Server.

Note that for installation, the SQL logon used must be a member of the **SQL Server SysAdmin role**. After installation (for application access) the logon only requires either **db_owner** or **db_datareader**, **db_datawriter**, **db_ddladmin**.

For the integrated backup and restore functionality the SQL logon must be a member of the **SysAdmin role**.

Database Name

The database name defaults to **RMT** but can be changed to anything so long as the name only contains letters, digits and underscores. The installation will verify that the name is valid and that a database by that name does not already exist.

If you are connecting to an existing RMTrack database you should mark the **Database already exists and is an RMTrack database** check box. The installation will verify that the database does exist and is an RMTrack database.

Database already exists and is an RMTrack database

About Integrated Security

The integrated security option is only available if the SQL server and RMTrack are installed on the same server.

A new local user will be created, named IUSR_RMTRACK. This user will be made a member of the Guests groups, given the right to logon as a service. The virtual directory will use the IUSR_RMTRACK user account for anonymous access, and the RMTrack Scheduling Service will run under the IUSR_RMTRACK user id.

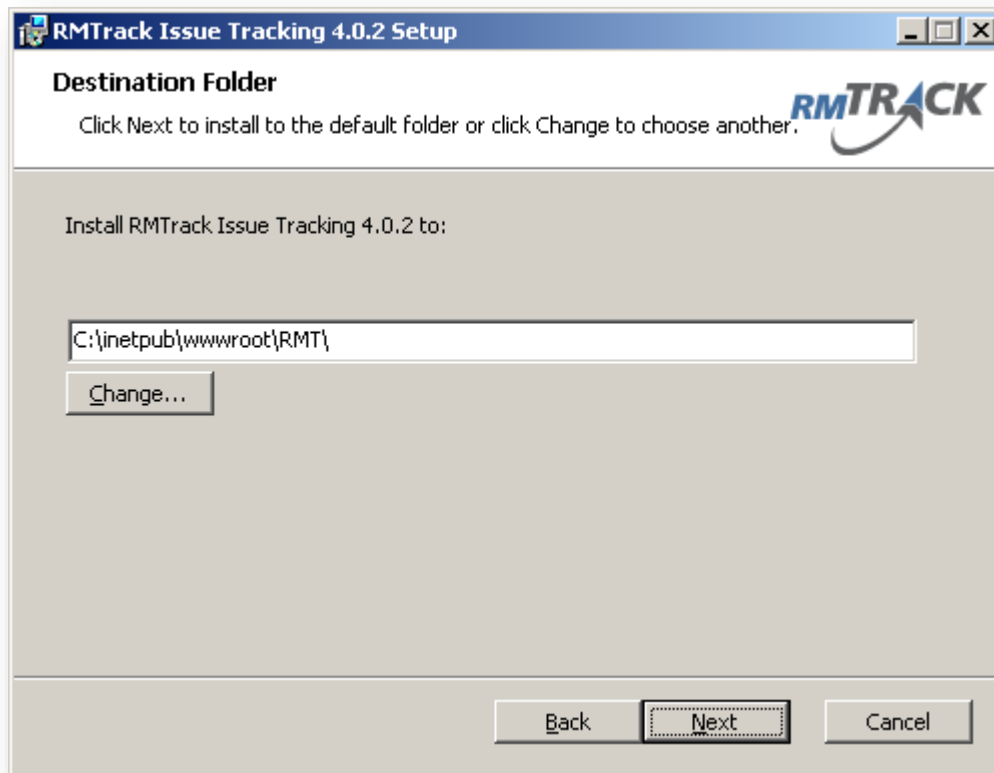
Changing the connection details after installation

All the connection details are stored in a file named DbConnection.udl. This file is stored in the installation folder (default location: C:\InetPub\wwwroot\rmt). Locate the file using Windows Explorer and double-click it to display a set of property pages that will let you change the connection details.

Note: if you change the database connection information you may need to change the user account for anonymous access for IIS and the user id for the RMTrack Scheduling Service.

Note: The DbConnection.udl file cannot be downloaded from within the RMTrack application (it has been specifically protected against that).

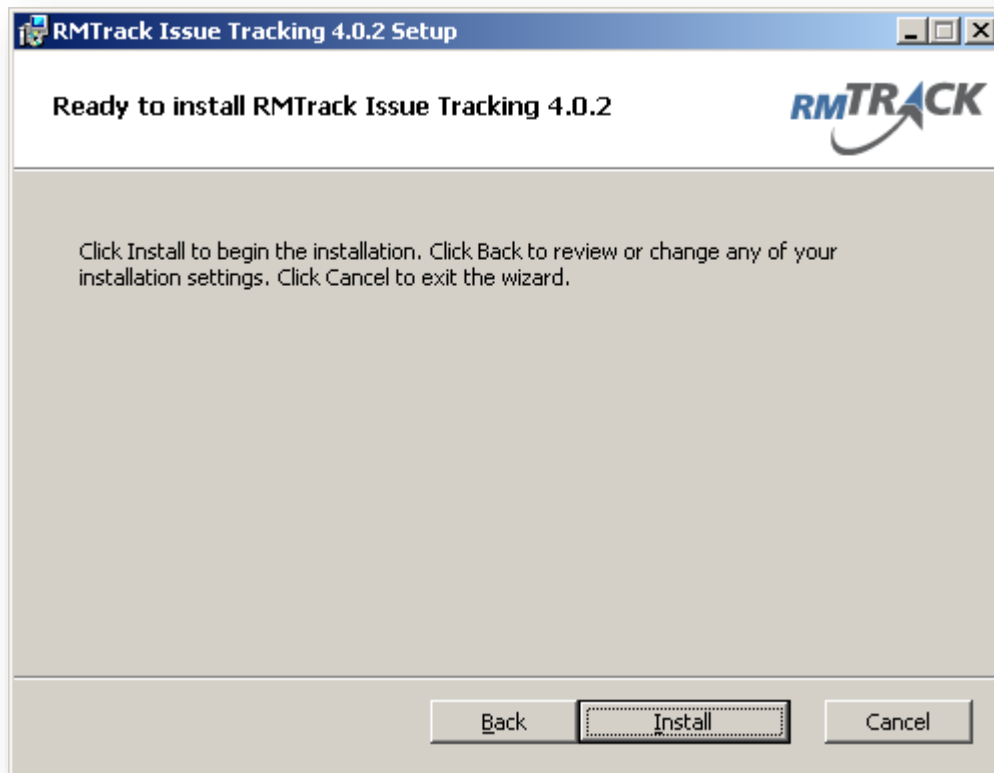
Destination Folder



The Destination Folder allows you to pick the location on your server's hard disk to install the files. The default is acceptable for most customers and is recommended.

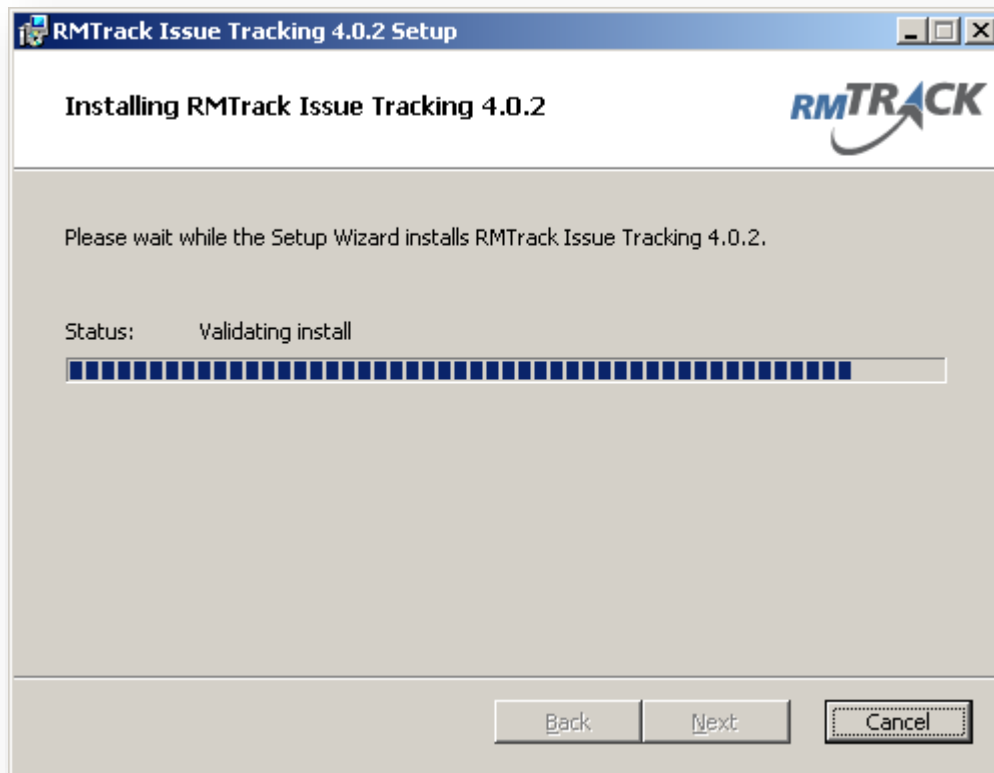
Note: Common support files (.DLL's etc.) are installed in the *C:\Program Files\RMTrack Issue Tracking* folder. This folder cannot be changed and the application depends upon its existence.

Ready to Install



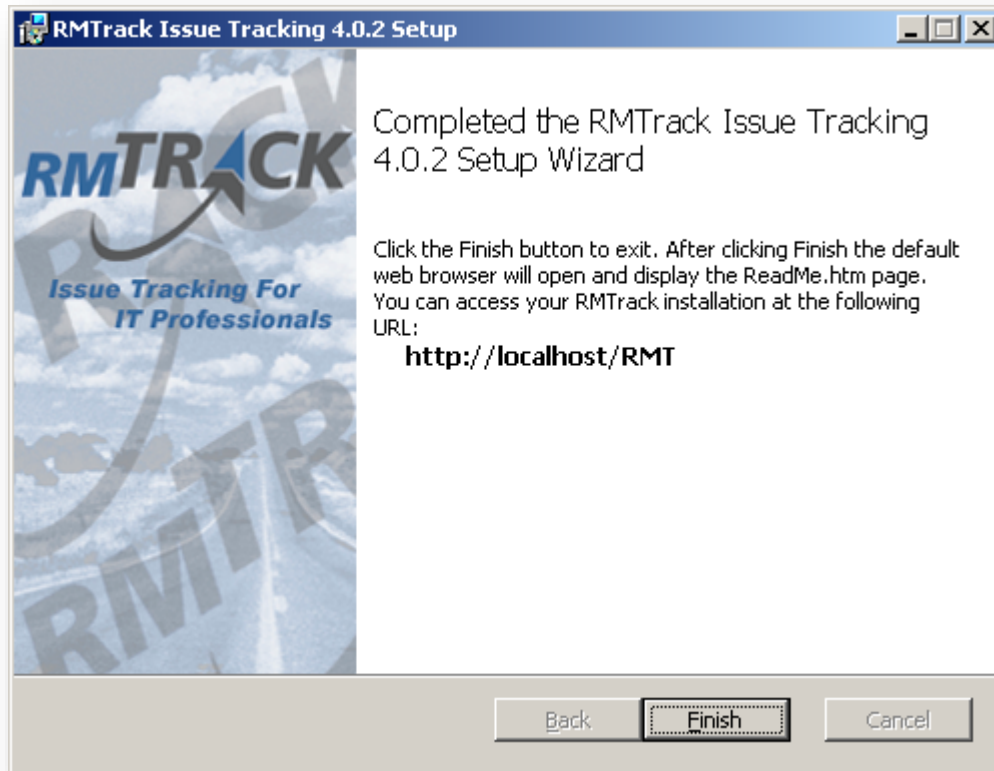
If you're ready to install click the **Install** button to begin the installation. You can also click the **Back** button to review your choices.

Updating System



RMTrack installation typically takes under two minutes, but this will depend on the speed of your server.

Finished



At this point the RMTrack application is installed and ready for use. After you click the **Finish** button the RMTrack **ReadMe.htm** will be displayed in your default browser.

Follow the directions in the ReadMe.htm for **Quick Start** to logon to RMTrack.

If the Readme.htm fails to open you can access the Readme (and the Login page) from your Start menu under **All Programs**→**RMTrack Issue Tracking**.

Upgrade

RMTrack Releases

Periodically RMTrack will release a new version of the application. Versions are numbered with a 3-point numbering system. The first number is the major feature release number, the second number is the minor feature release number and the third number is the maintenance release number. It is highly recommended that the most recent release of RMTrack be installed.

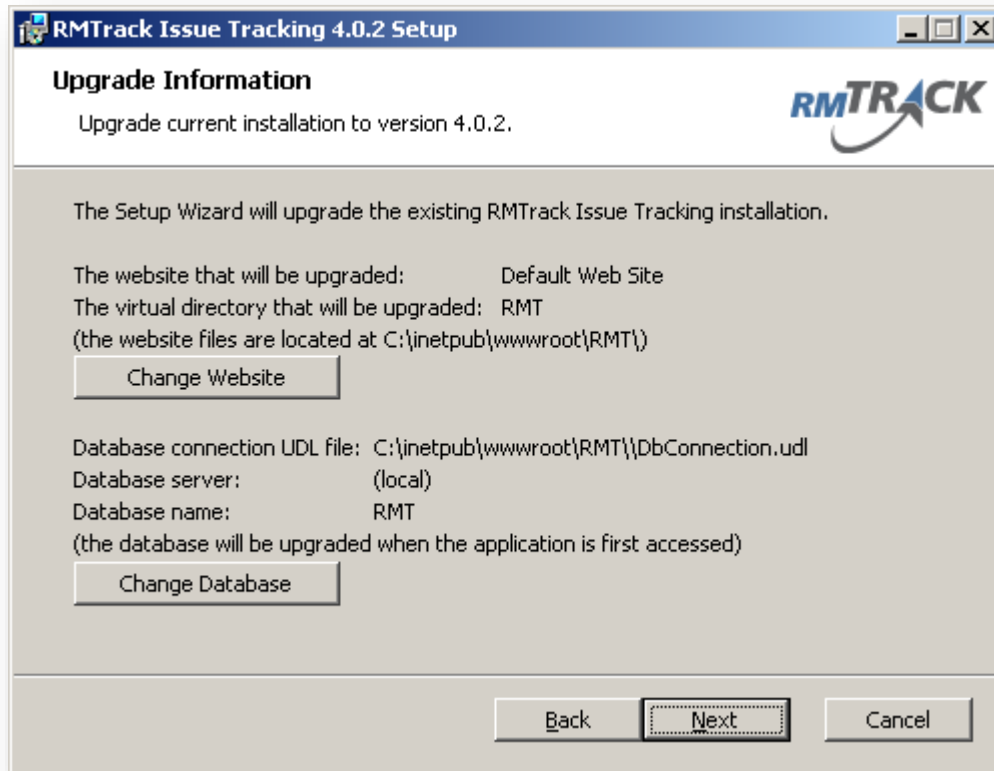
To upgrade to a new version of RMTrack it is not necessary to remove the existing version. The new version is installed by executing the installer program downloaded from RMTrack. The installer will allow you to connect to an existing RMTrack database and virtual directory. Any database upgrades are handled by the installer. If a backup of RMTrack is recovered, the database will be automatically upgraded when first accessed.

Welcome Screen



This is the standard welcome screen, and it is used to inform users of what application they are installing (or uninstalling).

Upgrade Information

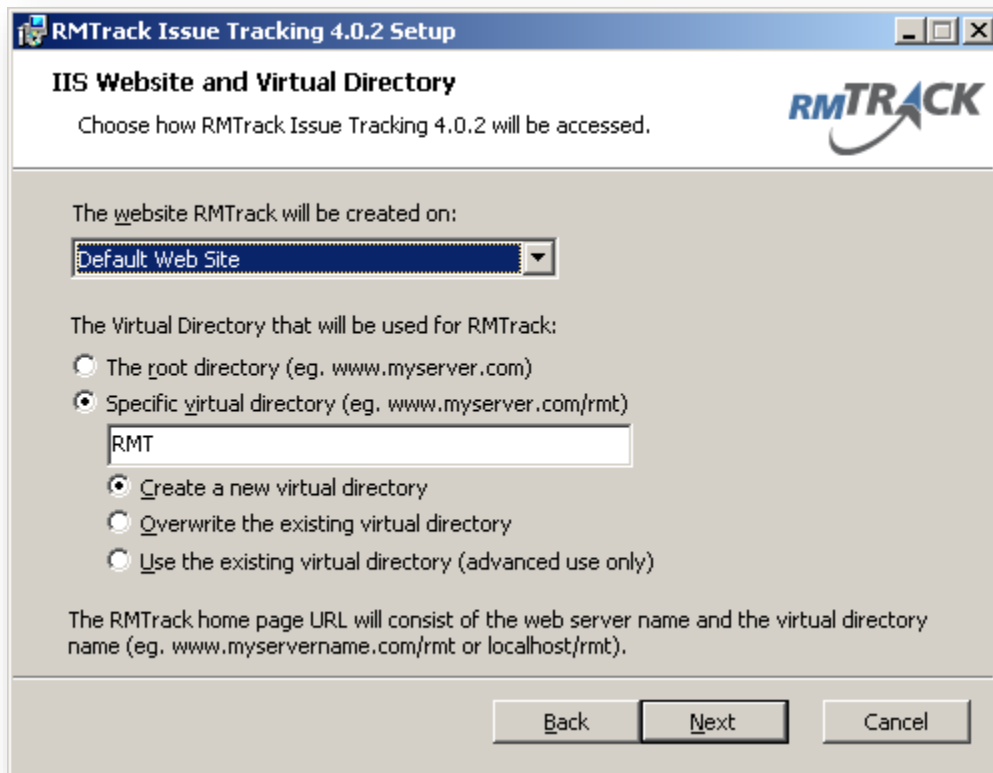


The website and database for the currently installed version of RMTrack are shown. Please verify that the information is correct.

If the website information is incorrect it can be modified by clicking the **Change Website** button.

If the database information is incorrect it can be modified by clicking the **Change Database** button.

IIS Website and Virtual Directory



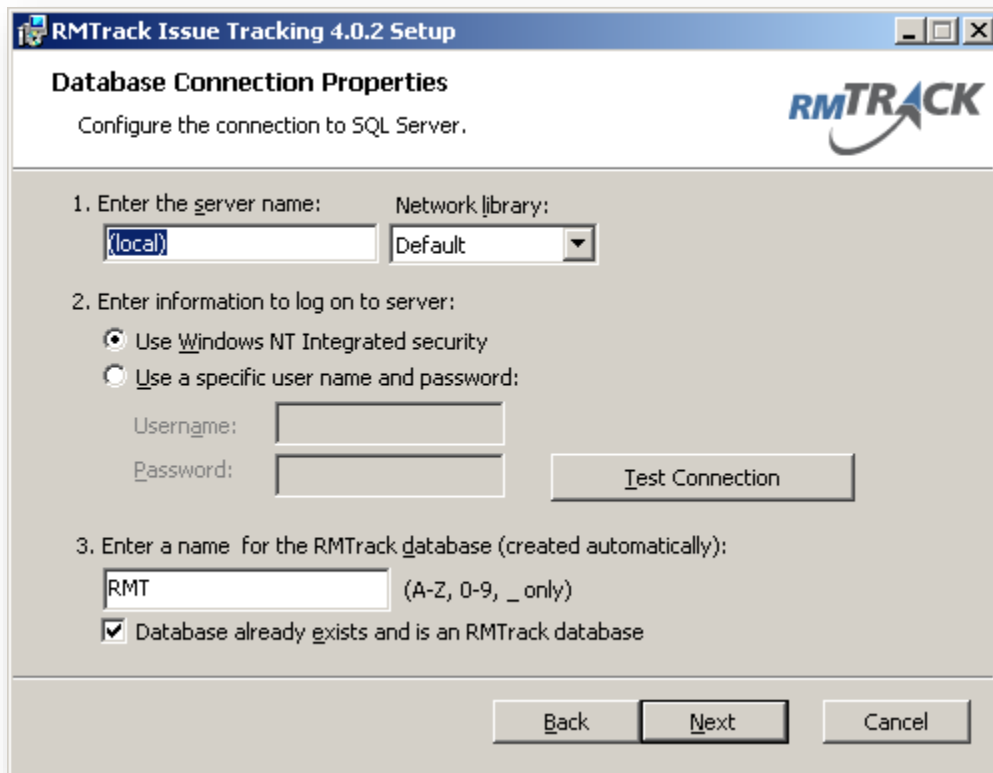
The website configuration screen is only shown if you've clicked the **Change Website** button and allows you to change what URL to access RMTrack.

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Database Connection Properties



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- 1. Enter the server name:** A text box contains '(local)'. **Network library:** A dropdown menu is set to 'Default'.
- 2. Enter information to log on to server:** Two radio buttons are present: 'Use Windows NT Integrated security' (selected) and 'Use a specific user name and password:'. Below the second radio button are text boxes for 'Username:' and 'Password:'. A 'Test Connection' button is located to the right of the password box.
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At the bottom of the dialog are three buttons: 'Back', 'Next', and 'Cancel'.

The database connection properties screen is only shown if you've clicked **Change Database** and allow you to change how RMTrack will connect to the SQL Server database.

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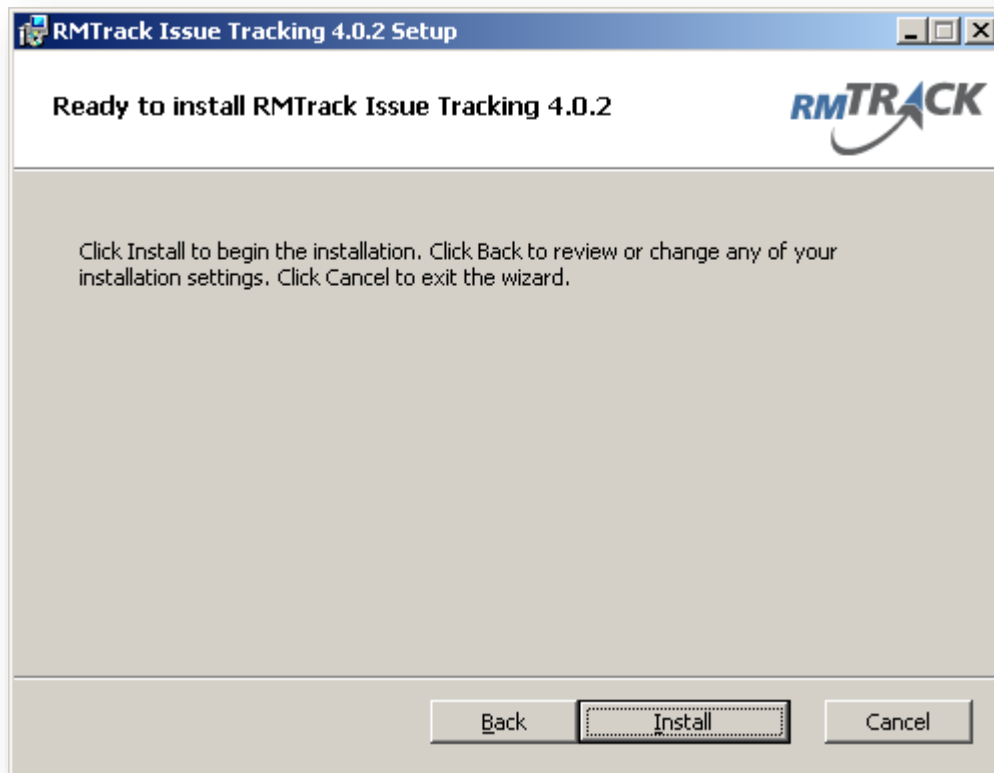
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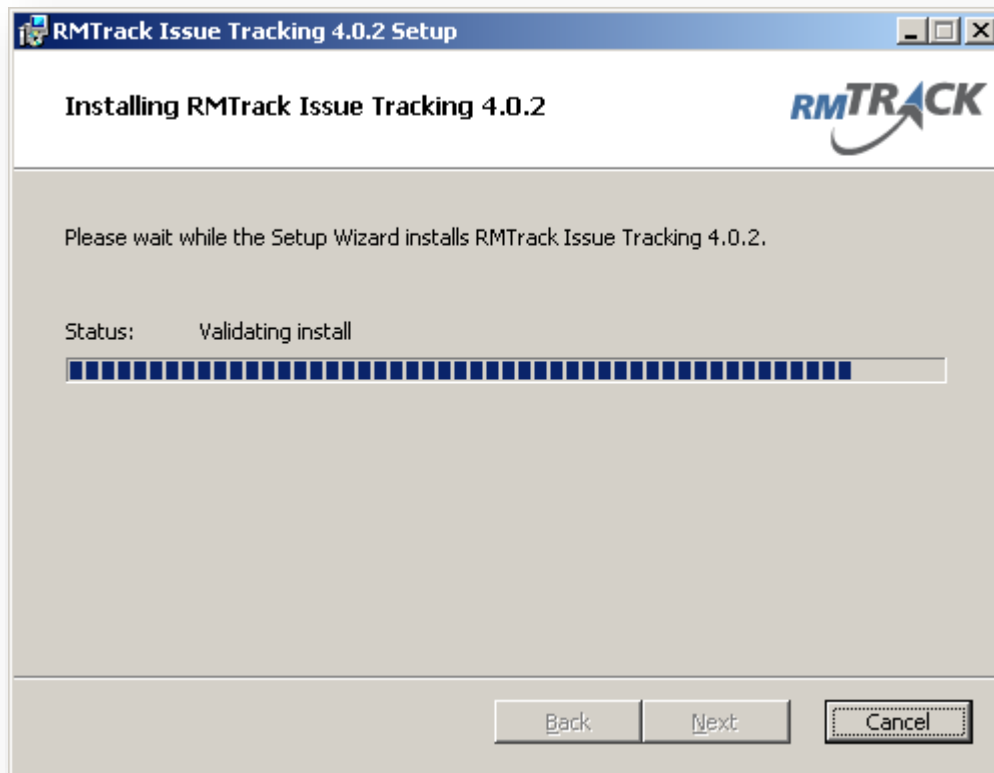
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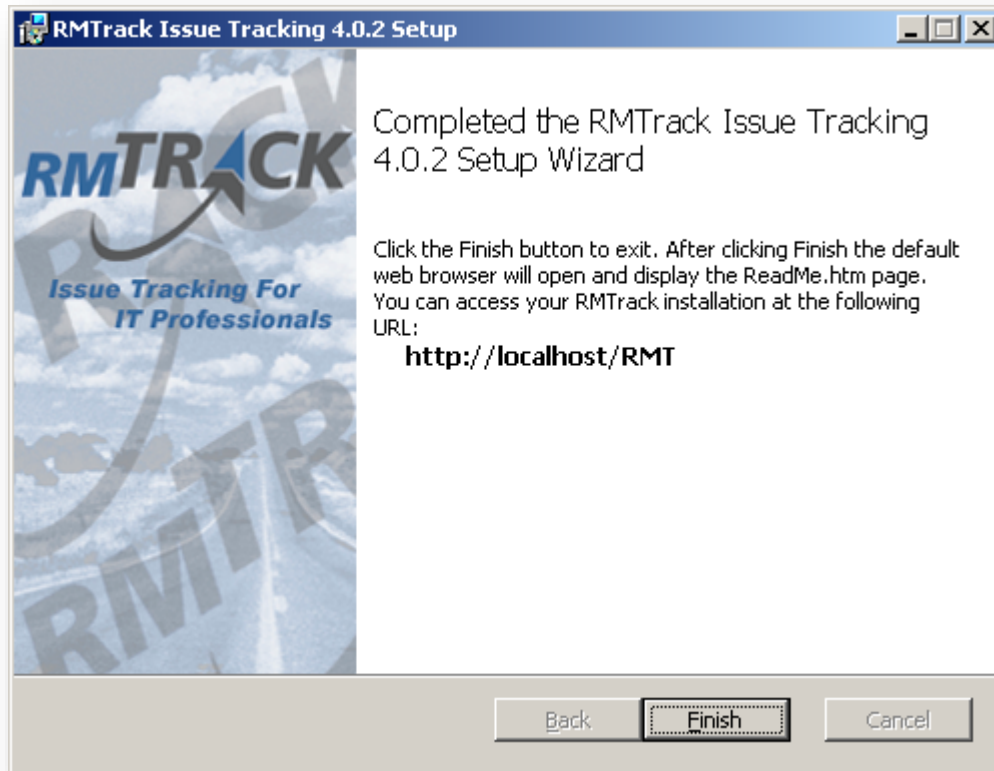
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Updating System



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Finished



At this point the RMTrack application is installed and ready for use. After you click the **Finish** button the RMTrack **ReadMe.htm** will be displayed in your default browser.

Follow the directions in the ReadMe.htm for **Quick Start** to logon to RMTrack.

If the Readme.htm fails to open you can access the Readme (and the Login page) from your Start menu under **All Programs**→**RMTrack Issue Tracking**.

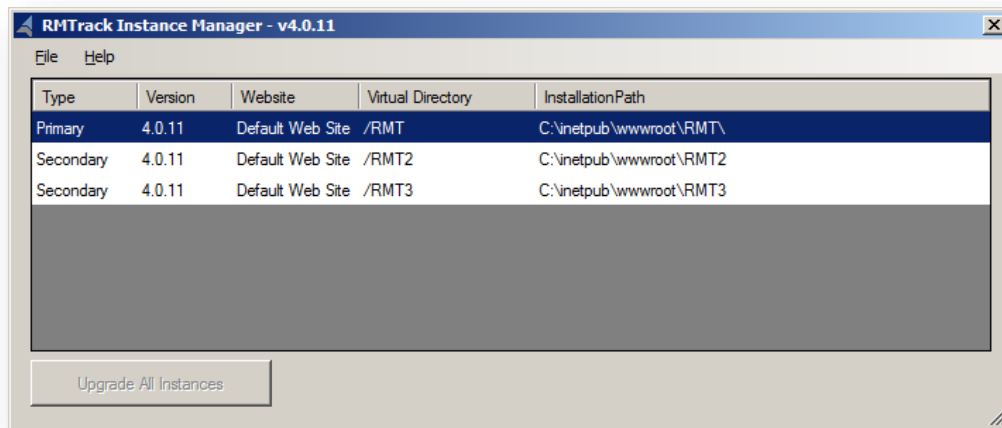
Multiple Instances of RMTrack

It is possible to have multiple instances (databases) of RMTrack installed on a server. Each separate database must have unique license keys. In some installations it may be advantageous to have separate web sites pointing to the same database - these do not require separate licenses.

Instance Manager

To create, maintain and delete multiple instances of RMTrack on a single server the RMTrack Instance Manager program must be used.

The Instance Manager is automatically installed when you install the RMTrack application. It can be found on the web server under Start > All Programs > RMTrack Issue Tracking > Instance Manager



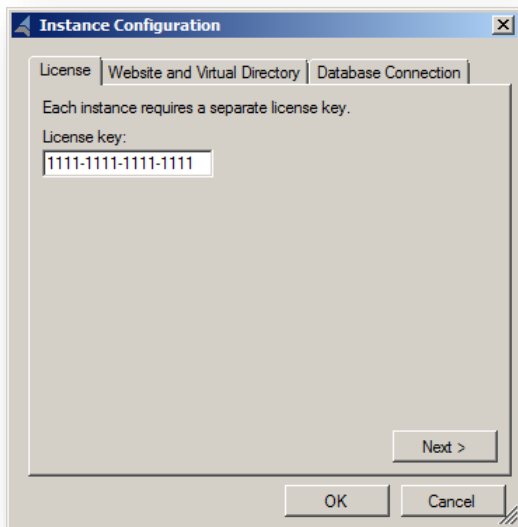
When you start the instance manager you will see a list of all instances of RMTrack on the server. The **Primary** instance of RMTrack is the instance that was installed with the RMTrack installer and is the instance that is upgraded when a new release of RMTrack is installed. All other instances are **Secondary** and must be maintained and upgraded by using the instance manager.

NOTE: The *Version* number should always be the same for all instances of RMTrack. You cannot run different versions of RMTrack.

Double-clicking on an instance will bring up additional information about the Virtual Directory and the Database Connection properties for that instance.

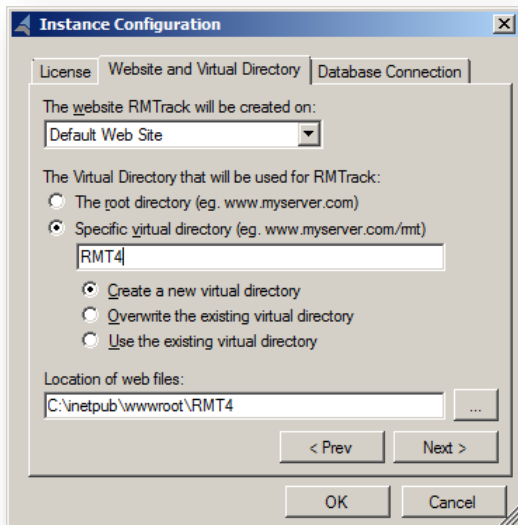
New Instance

To create a new instance of RMTrack select File > New Instance...

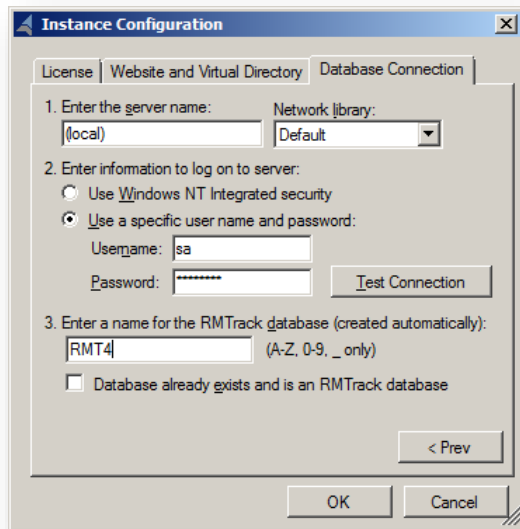


Each instance of RMTrack must have a unique license key. Please contact support@rmtrack.com or sales@rmtrack.com to arrange for trial or permanent licenses.

Once the license key entered click the Next> button to go to the Website and Virtual Directory settings:



After completing the necessary information for the new website click Next> to go to the Database Connection settings:



When all three settings tabs are complete click the OK button to create your new instance of RMTrack.

Delete Instance

To delete an instance select the instance then go to File > Delete Instance. This will remove the Virtual Directory only. It will not delete the database.

Upgrading Instances

After upgrading your Primary instance of RMTrack using the installer the instance manager program will launch automatically if it detects additional instances of RMTrack that need upgrading.

Clicking the **Upgrade All Instances** button on the main page of the instance manager will upgrade all instances to the same version as the primary instance.

Contact Information

At RMTrack we want your feedback! Please feel free to contact us, anytime, with questions, comments or inquiries:

General: inquiries@RMTrack.com

Support: support@RMTrack.com

Sales: sales@RMTrack.com

Web-Site: www.RMTrack.com

Phone: 416-929-1720

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