



Polarion® Software

# POLARION TRIAL GUIDE



## Quick Installation & First Steps for Evaluators

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Polarion Trial Guide

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# About this Guide

Welcome and thanks for trying Polarion. This guide is for anyone wanting to install any Polarion Software product for evaluation purposes:

- **Polarion® REQUIREMENTS™**
- **Polarion® QA™**
- **Polarion® ALM™**

The guide covers:

- **Minimum system and other requirements for an evaluation installation**
- **How to install an evaluation copy of Polarion**
- **How to start up and login after installation**

The guide also provides some tips for learning your way around, accessing the major feature areas in the context of a sample project, and creating a project of your own.

## Before You Begin

As you get started with your evaluation, here are some important things to keep in mind:

- We have provided a simple **“One-click” evaluation installation** track for desktop and personal computers running Windows®. It's designed to get Polarion up and running as quickly as possible.  
You will be able to access all features of the installed product, but please be aware that you are not running a production installation and some features, such as email notifications, will not work without some initial configuration. These generally will not block your evaluation.
- If you want to evaluate **performance and scalability**, or include more than a few users, you will probably want to conduct a full Proof of Concept (PoC) with a production installation on supported server hardware running a supported server operating system in a network environment.  
While still quite easy for most administrators, a production installation has more variables to consider and usually involves some initial configuration work, which is described in the product online Help.  
Evaluation License extensions, professional services, and a special step-by-step Evaluator's Guide are available to help you run an effective PoC. Write to [sales@polarion.com](mailto:sales@polarion.com) or call any Polarion office for more information and assistance.
- For a **PoC or production installation**, please download and refer to the Polarion Installation Guide for your server operating system, available on every product download page on the Polarion website ([www.polarion.com](http://www.polarion.com)).
- As an alternative for evaluators, Polarion provides **“test drive” servers** where you can log in and try the latest version of any Polarion product online for free, for as long as you wish.
  - **Sign up for a free account:** [www.polarion.com/products/requirements/demo.php](http://www.polarion.com/products/requirements/demo.php)
  - Polarion REQUIREMENTS Test Drive: <http://reqdemo.polarion.com>
  - Polarion ALM Test Drive: <http://almdemo.polarion.com>
  - Polarion QA Test Drive: <http://qademo.polarion.com>
- You may also be interested in exploring Polarion's cloud-hosted solution Polarion CLOUD:  
<http://www.polarion.com/products/cloud/>.



# What You Need

This section covers the prerequisites for an evaluation installation. It is assumed that you will access the Polarion portal on the same computer on which it is installed rather than remotely.

## Operating System

To get an evaluation installation installed and running as quickly as possible, we recommend a personal computer running one of the following Windows operating system versions:

- **Microsoft Windows XP (with Service Pack 2), or**
- **Microsoft Windows Vista, or**
- **Microsoft Windows 7**
- **Microsoft Windows 8 (Desktop mode)** <sup>1</sup>

This is so you can take advantage of the “One-click” Install option provided by the Polarion installer program for Windows, which will get you up and running with an installation that will enable you to check out all Polarion features, in a few minutes.

If you want to install Polarion on a server OS, you may do so. Please consult the list of supported Windows server operating systems at <http://www.polarion.com/techsupport/sysreqwin.php>.

## Linux Option

Polarion also runs on popular Linux distros and you can evaluate Polarion on Linux if you wish. While automated installer scripts are provided, there is no fast-track “One-click” install process as there is for Windows. You will need to download the distribution for your Linux distro and read the install.txt file in the root of the distribution. The Polarion Installation Guide for Linux, bundled in the archives, provides more detailed information. <sup>2</sup>

## Hardware

For evaluation installations on the recommended Windows platforms, you can use a desktop or laptop personal computer with the following minimum specifications:

- **RAM:** Minimum 2 GB for basic evaluation. (4 GB or more is better, especially if other apps are running. Remember that 4 GB is maximum for 32-bit OS.)
- **Disk Space:** 10 GB (More is better. 40 GB is preferred.)
- **Screen resolution:** 1280 x 800 pixels

If you want to install Polarion on a server hardware, you may do so. Please consult the list of supported Windows server operating systems and hardware requirements at <http://www.polarion.com/techsupport/sysreqwin.php>.

## Web Browser

All you need to use Polarion is a web browser. The most current list of supported browsers and versions is provided in the Release Notes section of the `README.html` file, delivered in all download distributions of all Polarion products.

<sup>1</sup> You must run Windows 8 in Desktop mode. Internet Explorer 10 is the recommended browser for this OS.

<sup>2</sup> A list of supported Linux distros is available at <http://www.polarion.com/techsupport/sysreqlinux.php>



## Polarion Installer Program

The installer for Windows® systems is a Windows executable (.exe) file. The distribution file name contains the product name, version number, service release ID (if applicable), and .exe. For example, the Windows distribution for Polarion Requirements version 2013 is available as: `PolarionRequirements_2013.exe`

The distribution archive contains a setup wizard program, and everything you need to get Polarion up and running on Windows is bundled, including Apache server, Java runtime, and Subversion.

See *Appendix: Product Download URLs* for links to product download pages on the web.

## Evaluation License Key

You must have an evaluation license file containing a license key, saved to a location accessible by the host computer in order to complete the installation.

An evaluation license key file is automatically emailed to each person who downloads the software. If you have been given a copy of the software without the license key, you can email [info@polarion.com](mailto:info@polarion.com) or call any Polarion Software office (visit <http://www.polarion.com/company/contact/contact.php>).

## Microsoft Office (Optional)

If you want to try out the import and round-trip features for Microsoft Word and/or Excel using documents you created, you need to have a supported version of Microsoft Office installed. For import, you only need a document saved with a supported version. For compatible Microsoft Office versions, please see *Appendix: Supported Microsoft Office Versions*.

## Internet Connection (Optional)

The distribution contains a demo project that needs a set of 3rd party libraries in order to be correctly built and have the project reports generated. Any missing libraries are automatically downloaded from the Internet during project processing, so you may need a connection to the internet when you first try building the demo project or running reports for it.

# Installing the Software

To install your Polarion evaluation copy:

1. If the computer on which you are installing Polarion is running a firewall, disable it for the duration of the installation to enable the installer to check for the availability of needed ports.
2. Copy the installer program file and the evaluation license file to some folder on the computer where you will install Polarion.
3. Run the installer program.
4. Follow the steps and instructions in the installation wizard, selecting the One-click Installation option when it is presented. (You will be asked to specify the location of your evaluation license key file during the process.)

Before terminating, the installer program offers you the option of starting Polarion. If you take this option, the installed Apache server will start, followed by the Polarion server, followed by the default web browser, which will load and display the portal login page. If you prefer to skip the option and start Polarion later, see *Starting the Polarion Server* later in this guide.

If you disabled the computer's firewall, don't forget to re-enable it after the installer terminates.

### IMPORTANT

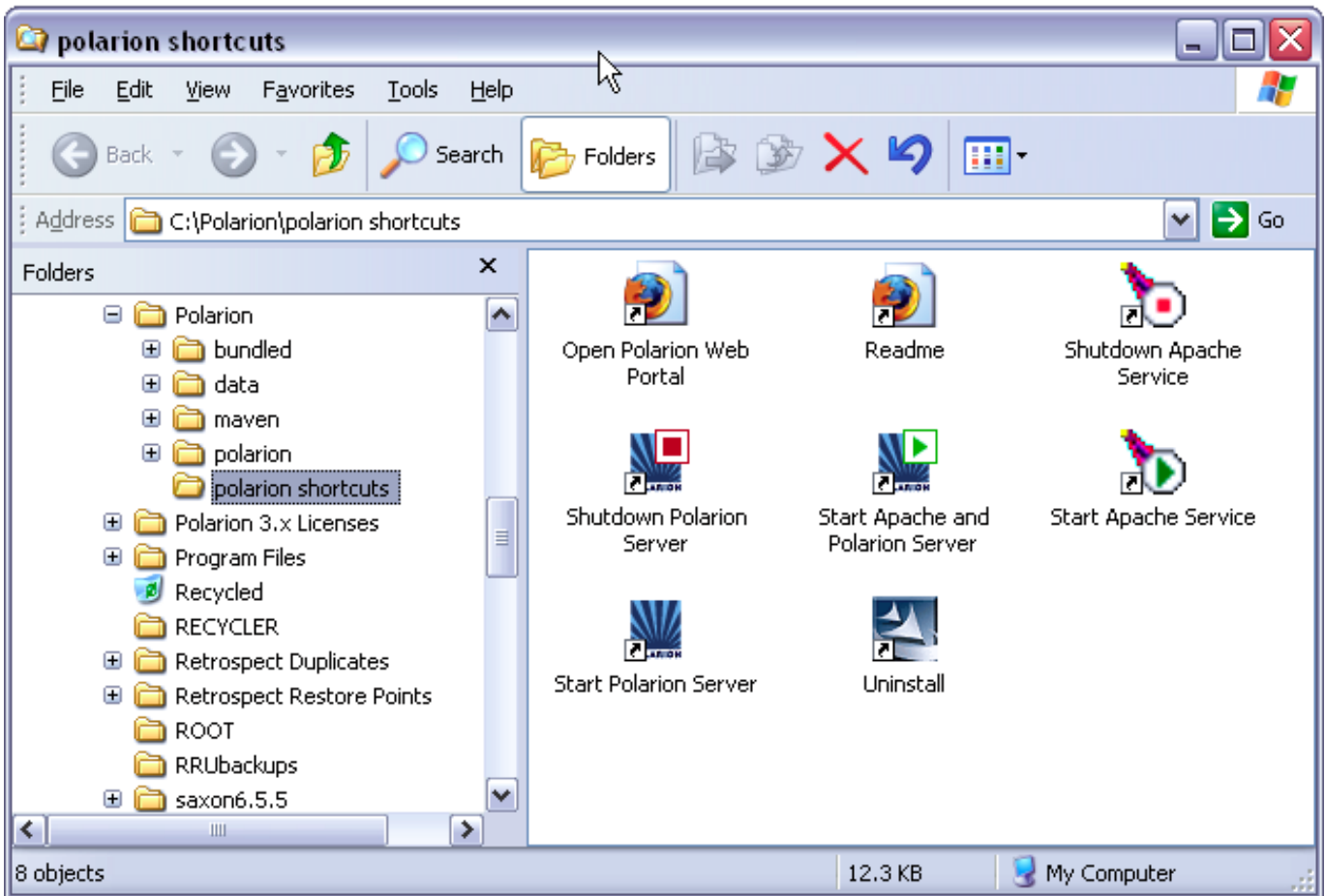
The installer program should only be used to install a new Polarion installation.  
Only one evaluation is permitted on the same machine at the same time.



# Starting and Stopping Polarion

The Windows installer creates and automatically configures a set of Shortcuts that enable you to start and stop the Apache service, start and stop the Polarion server, and launch the web portal in the default browser. There is also a shortcut for the uninstaller program that will remove the Polarion installation.

The shortcuts are located in the folder "C:\Polarion\polarion shortcuts". The installer places an icon on the Desktop that opens this folder in Windows Explorer.



Shortcuts for starting and stopping Apache and the Polarion server

## Starting the Polarion Server

When starting the server, run the startup in the following sequence:

1. Start up Apache Service (run the Start Apache Service shortcut)
2. Start up Polarion Server (run the Start Polarion Server shortcut)

Note that it is not necessary to start Apache Service again if it is already running. You can check if it is running using the Apache Monitor program found in: C:\Polarion\bundled\apache\bin\ApacheMonitor.exe

The first time you start the Polarion server, you will see a message in the console:

Not enough data for startup estimation.

**This is not an error message.** On startup and on re-index operations, Polarion estimates and reports the amount of time the operation will take. You will see this estimate in the console and log file on subsequent startups, but the first time, no data exists on which to base the estimate.



## Express Startup

The “express” shortcut named `Start Apache Service and Polarion Server` starts the Apache Service and Polarion Server service in the proper sequence.

**IMPORTANT** This shortcut should only be used when neither Apache Service nor Polarion Server are running.

## Stopping Polarion

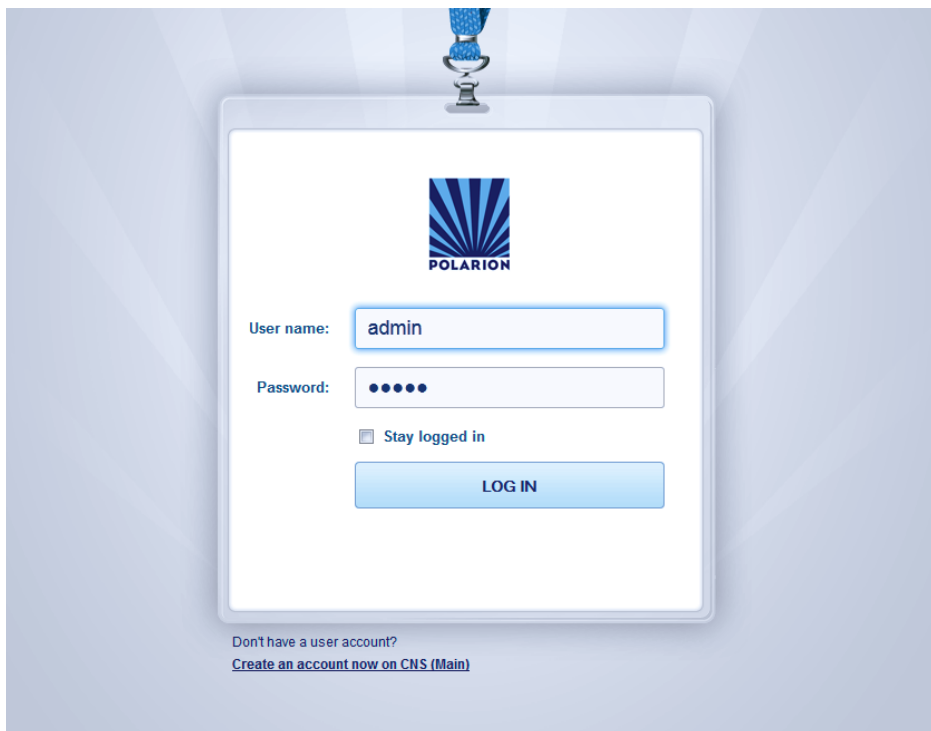
- To stop the Polarion server, run the shortcut named `Shutdown Polarion Server`. If you will also stop the Apache service, run this shortcut before doing so.
- To stop the Apache service run the shortcut named `Shutdown Apache Service`.

**Be sure Polarion server has stopped before stopping Apache service.**

It is not necessary to stop the Apache service between Polarion sessions, but on an evaluation computer you probably will want to stop it when you stop the Polarion server to free up system resources.

## Logging in

After installation and startup, you must log in to the portal. A shortcut named `Open Polarion Web Portal` is provided in the same folder as previously mentioned. You can use it to open the portal login screen in your default web browser after Apache Service and Polarion Server are started.



On your first start-up, we recommend you log in as the System Administrator user:

- **User Name:** `admin`
- **Password:** `admin`

The System Administrator user has full permissions for everything.



# First Evaluation Steps

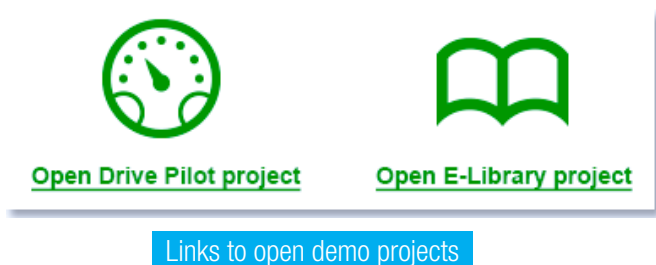
This section provides some tips and suggestions to help you get started with your Polaron evaluation.

## Open and Browse the Demo Project

The One-click installation installs 2 sample projects:

- **E-Library** is an example software application project. Focus on this demo if you develop software applications.
- **Drive Pilot** is an example system engineering project. Focus on this demo if you develop products involving both software and hardware.

When you first log in, you are working in the Default Repository, and the portal home page is displayed. This page provides graphical links that will open the demo projects:



When the E-Library project opens, the project Home page provides information about the main project areas (called “spaces”) and provides links into them.

We suggest you browse the spaces and the Documents and pages they contain. Start with whatever seems most interesting to you. The Home topic in Navigation will always return you to the project Home page.

The Navigation panel on the left displays “topics” which lead you to the major features. You can, at your option, expand the Navigation panel and select feature topics you would like to look into. (The topics shown depend on the product license you are using.)

## Browse Administration

To get a feel for Polaron’s extensive options for custom configuration, you’ll want to be sure to browse around in the Administration interface. You must log in with administrator permissions in order to access it (see Logging In).

To access Administration:

Log in as the System Administrator user if you have not already done so. Invoke the Tool view of Navigation and click the Administration link:

## Create a “Sandbox” Project

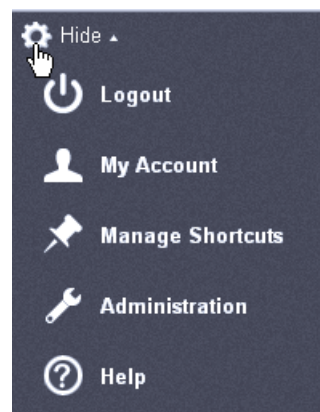
After you have had a chance to browse the sample projects, you can try creating a sandbox project of your own. Click the Polaron icon in Navigation to return to the portal home page. Then on that page, click the graphical link for creating a new project:



Link to create a test or “sandbox” project

1. In the ID field of the dialog, type something without spaces. E.g. **myNewProject**
2. In the Location field, type **Sandbox** – this will create your new project under the Sandbox folder in the repository. Click the *Next* button.
3. On the Template page of the dialog, just accept the default template choice. It will be the best one for the product you are using to give you a feel for what features and pre-configuration the template provides for the kind of projects most often managed with this product.
4. Go ahead and finish the steps of the new project wizard.

Start with the Documents and Wiki topic in Navigation. Look at the spaces and default Documents provided by the template. Try out features like creating a new Document or importing from Microsoft Word or Excel. (You can download an archive with sample Word and Excel files at [www.polarion.com/downloads/Office-Import-Samples.zip](http://www.polarion.com/downloads/Office-Import-Samples.zip)).





When working in Administration, the Navigation pane's content is replaced with administration topics, which provide access to all administration and configuration features except those which require modifying the system properties file. (Such configuration is considered "advanced" and is not usually needed by the majority of Polarion users.)

Administration features are available in the "global" scope (that is, when you open Default Repository), and in the scope of each project. Global settings apply to all new projects unless overridden in a project. (Some settings are global only.)

As you explore the Administration options, you will probably find it useful to look at the Administrator's Guide component of the online Help.

## Watch Video Tutorials

As you become familiar with Polarion's interface and features, you should take advantage of the series of video tutorials available on the Polarion Software website at <http://www.polarion.com/tutorials/>.

The tutorials are aimed at new users and evaluators and cover the most common user and administration features that people want to learn about.

# Appendix

## Product Download URLs

- Polarion ALM: <http://www.polarion.com/downloads/alm.php>
- Polarion REQUIREMENTS: <http://www.polarion.com/downloads/requirements.php>
- Polarion QA: <http://www.polarion.com/downloads/qa.php>

## Navigation Topics

The following table can help you familiarize yourself with the Navigation topic so you can zero in on the features that interest you most.

Topic	Description	Availability
Home	Access the project home page	QA REQ ALM
Documents & Wiki	Access specification and other Documents, and wiki spaces & pages	QA REQ ALM
Work Items	Access the integrated tracker and all project issues (Work Items)	QA REQ ALM
Test Runs	View existing Test Runs and status, create new Test Runs	QA ALM
Baselines	View and compare existing baselines, create new baselines	ALM REQ
Builds	View completed and running builds and status, trigger a new build	ALM
Dashboard	View and update general project status charts and graphs	ALM
Quality	View and update quality scoreboard and quality metrics reports	ALM
Reports	View and calculate source code reports and documentation	ALM
Monitor	View finished and running jobs, execute a job	QA REQ ALM
Repository Browser	Browse the underlying Subversion repository	QA REQ ALM
Global & Project Shortcuts	Access pre-configured shortcuts leading to different project content and or data views	QA REQ ALM



## Evaluating Polarion for Multiple Repositories

Polarion has features that enable you to work with multiple repositories, either external to Polarion in conjunction with Polarion's own repository, or running with multiple concurrent Polarion instances each with it's own repository. If you would like to evaluate these capabilities, please download the **Polarion Multi-repository Setup Guide** (PDF), available on the same page as any Polarion product download.

Refer in particular to the Appendix section: *Multi-instance Setup for Evaluation, Testing, or Demonstration*.

## Supported Microsoft Office® Versions

If you are evaluating Polarion REQUIREMENTS, Polarion QA or Polarion ALM, and you want to try the Microsoft Office data interchange features for Word and/or Excel with files you have created, please note the following table, which outlines compatible versions of Microsoft Office applications.

				Microsoft Office Version		
Feature	Action	Extension	Data format	2003	2007	2010
2011 "LiveDoc™ Documents" (also called simply "Documents")	Import from Word, Excel	<a href="#">DOCX, XLSX</a>	<a href="#">DOCX, XLSX</a>	UNSUPPORTED <sup>1</sup>	SUPPORTED	SUPPORTED
	Word/Excel Round-trip Export, Re-import					
Pre-2011 Word and Excel "LiveDoc" documents	Excel export	<a href="#">XLS</a>	XML	SUPPORTED	SUPPORTED	SUPPORTED
	Word export	DOC		CONDITIONAL <sup>2</sup>	CONDITIONAL <sup>2</sup>	UNSUPPORTED

### NOTES:

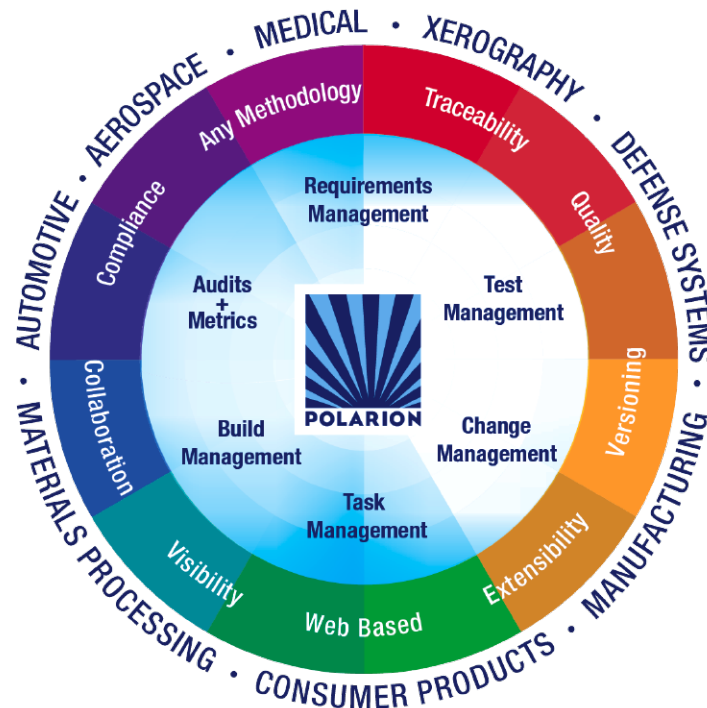
1. Unsupported, but may possibly work with the Microsoft Office Compatibility Pack (<http://support.microsoft.com/kb/924074>). Polarion has not tested it, so it is officially unsupported.
2. Supported prior to the January, 2010 update of Microsoft Office. Versions of Word 2007 that are distributed by Microsoft after January 10, 2010, no longer read the custom XML markup that may be contained within .docx, .docm, .dotx, .dotm or .xml files. The new versions of Word 2007 or the updated version of Word 2003 can still open these files, but any custom XML markup is removed. See <http://support.microsoft.com/kb/978951>. If your pre-2011 projects contain Word LiveDoc documents, it is recommended to migrate the Work Items in them to the new 2011 Live Document format. Information is provided in online Help.



# About Polarion Software



Polarion Software's success is best described by the hundreds of Global 1000 companies and over 1 Million users who rely daily on Polarion's Requirements Management, Quality Assurance, and Application Lifecycle Management solutions. Polarion is a thriving international company with offices across Europe and North America, and a wide ecosystem of partners world-wide. For more information, visit [www.polarion.com](http://www.polarion.com).



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