Polarion®
TRIAL GUIDE

Quick Installation and First Steps for Evaluators

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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 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).

- 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
    - 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 64-bit Windows operating system versions:

- Microsoft Windows 8.1
- Microsoft Windows 10

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 in the *Polarion Installation Guide for Windows*, available online at https://www.polarion.com/resources/download/polarion_install_guide_win.

NOTE
You must run Windows 8 in Desktop mode. Internet Explorer 10 is the recommended browser for this OS.

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.

For a list of supported Linux distros see the *Polarion Installation Guide for Linux*, available at: https://www.polarion.com/resources/download/polarion_install_guide_linux.

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.)
- **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 in the *Polarion Installation Guide for Windows*: https://www.polarion.com/resources/download/polarion_install_guide_win.

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. (A recent version of Firefox, Chrome, or Edge should work.)

Polarion Installer Program

The installer for Windows systems is a 64-bit Windows executable (.exe) file. The distribution file name contains the product name, version number, service release ID (if applicable), the processor specification and .exe. For example:

`PolarionALM_2016_SR1_x64.exe` Windows 64-bit distribution for Polarion ALM version 2015 SR1

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*.

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.

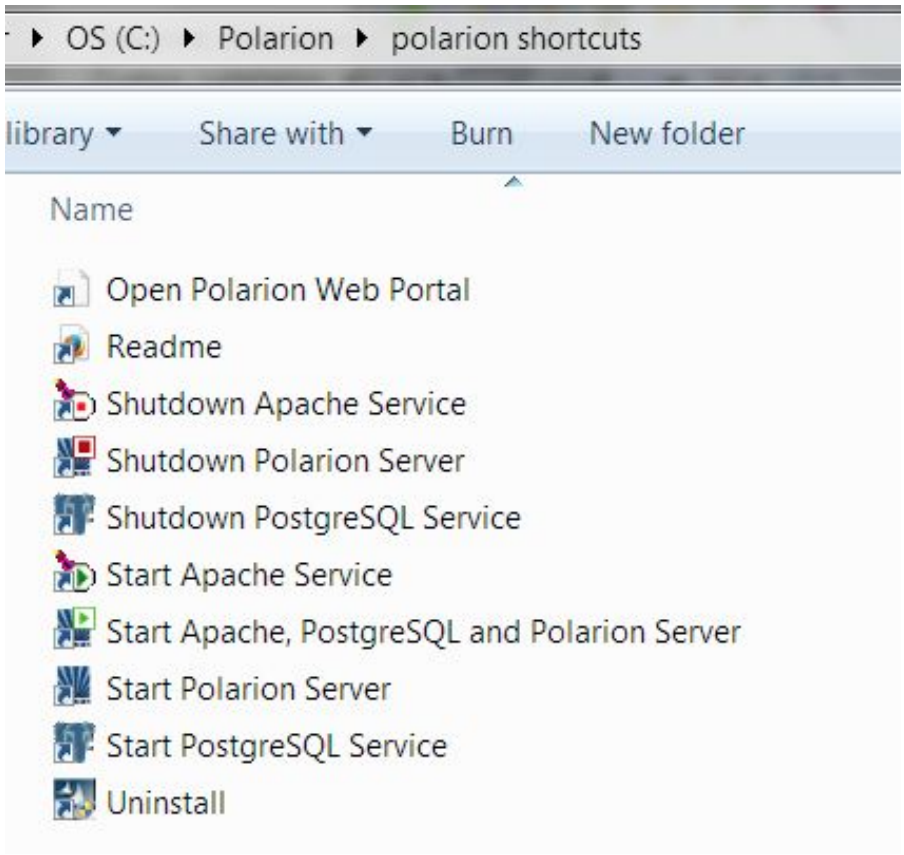
Before terminating, the installer program offers you the option of starting Polarion. If you take this option, the installed Apache server will start, followed by the Polarion server, followed by the default web browser, which will load and display the portal login page. If you prefer to skip the option 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 for the first time, run the shortcut *Start Apache, PostgreSQL and Polarion Server*.

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

Should you choose to run individual startup shortcuts, they should always be run in this sequence:

1. *Start Apache Service* shortcut
2. *Start PostgreSQL Service* shortcut
3. *Start Polarion Server* shortcut

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

You use the Windows Task Manager to see if service *PostgreSQLPolarion* is running.

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

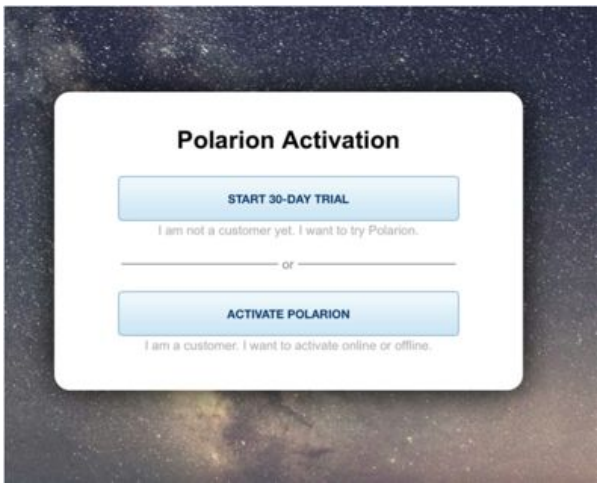
```
Not enough data for startup estimation.
```

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.

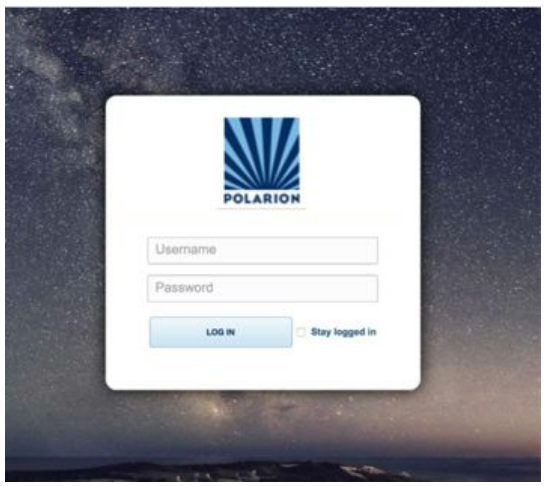
Logging in

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 the initial page, click the button: **START 30-DAY TRIAL**:



The login page now loads:



On your first startup, 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 Polarion evaluation.

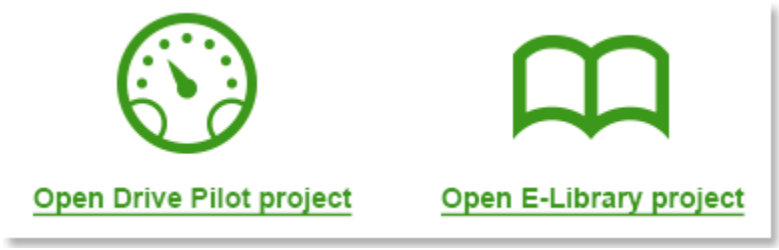
Open and Browse the Demo Project

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.)

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 Polarion icon in Navigation to return to the portal home page. Then on that page, click the graphical link for creating a new 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).

Browse Administration

To get a feel for Polarion'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:

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

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: https://www.polarion.com/downloads/alm
- Polarion REQUIREMENTS: https://www.polarion.com/downloads/requirements
- Polarion QA: https://www.polarion.com/downloads/qa

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		ALM, REQ, QA
Documents & Pages		ALM, REQ, QA
Plans		ALM, REQ*, QA*
Work Items		ALM, REQ, QA
Test Runs		ALM, QA
Baselines		ALM, REQ
Builds		ALM
Dashboard		ALM
Quality		ALM
Reports		ALM
Monitor		ALM, REQ, QA
Repository Browser		ALM, REQ, QA

** Create in ALM only*

Evaluating on a Large Scale

If you need a large-scale server environment with multiple clustered servers and failover capabilities, multiple repositories, etc. and you would like to set up this kind of environment to evaluate Polarion, you should get the Polarion Enterprise Setup Guide (PDF), available on product download pages on the Polarion Software web site.

Polarion's sales team includes expert professional engineers who will be happy to work with you to set up a Proof of Concept for this type of enterprise environment. Email sales@polarion.com, or contact the Polarion office or partner nearest you: http://www.polarion. com/company/contact/

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**	**Format**	**2003**	**2007**	**2010**	**2013**
Polarion LiveDocs (2011)	Word Import & round-trip	DOCX	DOCX	UNSUPPORTED [1]	SUPPORTED	SUPPORTED	SUPPORTED
	Excel Import & round-trip	XLSX	XLSX	UNSUPPORTED [1]	SUPPORTED	SUPPORTED	SUPPORTED
Polarion LiveDocs (2010) [2]	Excel export	XLS	XML	UNSUPPORTED [2]	UNSUPPORTED [2]	UNSUPPORTED [2]	UNSUPPORTED [2]
	Word export	DOC	XML	UNSUPPORTED [2]	UNSUPPORTED [2]	UNSUPPORTED	UNSUPPORTED

NOTES:

1. Beginning with Polarion version 2014-SR1, Microsoft Office 2003 is no longer supported in Polarion LiveDocs.

2. Prior to Polarion version 2011, "Live Documents" referred to Microsoft Office Word and Excel documents based on special document templates developed by Polarion Software, which could define and store Polarion Work Items. Beginning with version 2011, Polarion refactored the technology completely but maintained backward compatibility. Beginning with Polarion version 2014-SR1 support for this legacy format is dropped completely.

About Polarion Software

Since Polarion's inception in 2004, our mission has been to help companies advance the development, governance and maintenance of software via a unified solution for Requirements-, Quality- and Application Lifecycle Management.

We have an unwavering commitment to help organizations unlock synergies across complex development environments for applications and embedded systems. Our solutions provide the underpinnings to accelerate collaboration, integrity and innovation, so our customers can focus on solving important problems for their clients.

Working with innovative partners, we expand our mission to help customers unlock synergies across all of their development teams. Integrating Product Lifecycle Management (PLM) and Application Lifecycle Management (ALM) processes allows us to bridge the gap between mechanical, hardware, electronic and software development, delivering unprecedented efficiencies.

Polarion was founded in 2004 by industry veterans with a disruptive vision for software and product development. In 2005, the company released Polarion ALM, the first 100% browser-based unified development platform designed to optimize enterprise development ecosystems and to revolutionize what it means to be an open system.

Today, Polarion continues its leadership in Application Lifecycle Management, with 10 years of amazing organic growth and over 2.5 million users. In 2014, Siemens Venture Capital, a wholly-owned business unit of Siemens AG and long-time Polarion customer, provided a corporate investment to help fund Polarion's global growth.

Our customers use our solutions to respond to today's complex development challenges faster, with better quality, and at a lower total cost of ownership (TCO).

Handy Links

- Polarion Solutions
- Customer Testimonials
- Polarion Events & Webinars
- Contact Polarion Software