FORTRA

Robot Reports
7

Installation Guide

Before You Begin

Read these instructions completely before attempting an installation or update.

- This document provides specific instructions on how to install or update Robot Reports using the Product Loader.

- The Robot Reports installation creates or changes two user profiles: RBTUSER and RBTADMIN. These profiles own all Robot Reports objects. RBTADMIN has the attributes of a QSECOFR profile. RBTUSER has attributes like QPGMR. Directory entries are automatically added for the RBTADMIN and RBTUSER profiles.

  These profiles were created for the following reasons:

  - They satisfy requests from corporate auditors that our objects be owned differently from IBM objects.

  - They allow us to build a secure product for your environment.

  - They isolate Fortra products from IBM changes to the QPGMR or QSECOFR profile defaults.

  Note: If you have made any manual changes to the RBTUSER or RBTADMIN user profiles and their authorities, these changes will be lost with any product installation or conversion.

- If you have any network security products, be aware that the GUI version of Robot Reports uses the RMTCMD server and the QIBM_QZRC_RMT exit point. We recommend that the exit point be open to RBTUSER, RBTADMIN, and the user logging into the Robot REPORTS GUI application.

- Before loading Robot Reports, we check if RBTSYSLIB needs to be updated. If it does, you'll be asked to bring down the subsystem RBTSLEEPER. This ends all Robot products running on your system. When the update completes, the subsystem will restart automatically.

- **For installs only:** When you're finished loading Robot Reports, follow the steps below to enter the license code.

- Once the installation or update process completes, read the After You Are Done section for additional information.

Installing or Updating Robot Reports

Use these instructions to install or update Robot Reports. This process downloads everything to your PC and loads the objects on the IBM i. Read the following steps carefully to proceed.

1. Download the Robot Reports installer (**setupReports.exe**). Double-click it to start it.

2. On the Choose Components panel, select which components you want to install. Click **Next**.

3. On the IBM i Details panel:

   a. Select or enter the IBM i where you want to load Robot Reports.

   b. Enter a user profile and password that's a member of the user class *SECOFR and has at least the following special authorities: *ALLOBJ, *SECADM, *JOBCTL, and *IOSYSCFG. The user profile should have Limit capabilities set to *NO. This profile will be used to restore and copy objects, and for product maintenance on the IBM i.

   c. (Optional) In the Advanced Settings section:

- Enter a port number or use the arrows if you want to change the FTP port number to something other than the default of 21.

- Select **Secure File Transfer** if you want to use FTPS (FTP over SSL) during the file transfer. The default FTPS secure port is 990, but it can be changed to the required secure port for your environment.

- In the **Timeout (seconds)** field, enter the number of seconds the session should be kept active during an FTP transfer. You can choose anywhere between 25 and 1800 seconds (30 minutes).

  Note: If the transfer takes longer than the amount of time specified, the session will expire.

  d. Click **Next**.

4. You have two options on the Product Load Options panel:

   a. Click **Immediate Load** if you'd like to load the product on the IBM i now.

   Note: If you are doing an update, this ends Robot Reports until the product load completes. After you are done, we'll restart the product.

   b. Click **Staged Load** if you'd like to transfer the objects now and load them on the IBM i at a later time.

   Note: See "Loading Staged Objects on the IBM i" below for instructions on how to load the staged objects on your selected IBM i system.

5. The Product Load Progress panel for Robot Reports launches. When the processing is complete, you have two choices:

   - If this is the only installation or update of Robot Reports that you are doing, click **Finish**.

   - If you have installations or updates to do on other IBM i systems, click **Restart**. Then, return to step 4.

   Note: If the Product Load Progress panel ends with an overall Failed message, the product upload could not complete properly. To find the reason the upload failed,

click **View Logs** and review your logs. You can also use **Download** at the top of the logs to save the information for future review.

Loading Staged Objects on the IBM i

If you chose to stage your objects during step 4b of the installation or update process, do the following to manually load them on the IBM i.

1. On the IBM i, execute the following command to display the Work with Loads panel:

   HSLOADMGR/HSWRKLOAD

2. Enter option **1**, Load, next to the Load Name for Robot Reports and press **Enter**.

   The installation program installs Robot Reports, the RBTSYSLIB library (as needed), and two user profiles (RBTADMIN and RBTUSER). It adds RBTSYSLIB to the system portion of your library list, if required.

Entering the License Code

Note: You only need to enter a license code after installing Robot Reports. If you updated Robot Reports, skip these steps.

After you load Robot Reports, you must enter a license code in order to use the product. If you have not received a license code, contact your Regional Sales Manager.

1. Execute the following command on the IBM i to open the Installed Robot Products panel:

   RSLVER

2. Enter option **1** by Robot Reports to open the Robot Reports License Setup panel.

3. Copy your new license code. Then, paste it into the first entry field under **License Code** (it will automatically fill the other fields).

4. Press **Enter**.

After You Are Done

- After the installation process completes, delete the library REPTEMP from your system using the following command:

  DLTLIB REPTEMP

- To access the product's Main Menu on the IBM i, execute the command **RBO** on a command line to display the Robot Automated Operations Solution panel. Then, enter option **12** for Robot Reports.

- Set up Robot Reports on your system as described in the *Robot Reports User Guide*.

- Robot Reports lets you convert IBM i reports to PDF format, to be viewed on any computer. You must install Adobe Acrobat Reader on each computer that will be used to view the PDF reports.

- Three libraries were restored to your system for use during the installation or update process: HSLOADMGR, HSLOADMGRW, and RBTCDRLIB. We do not remove them from your system in case you are doing multiple installations. You can delete them when you are finished.

  Note: You can move the library HSLOADMGR to a different system on the IBM i and use it to complete additional installs or updates.

- The installation program restored four libraries to your IBM i: RBTREPLIB, RBTSYSLIB, RBNREPMST, and REPMRGLIB.