

The Siemens logo is displayed in a white rectangular box in the upper left corner of the page. The logo itself is the word "SIEMENS" in a bold, teal, sans-serif font.

SIEMENS

The title "Polarion 19.3 Trial Installation" is centered in a teal rectangular box. The text is white, bold, and sans-serif. The background of the entire page is a low-angle shot of a modern glass skyscraper against a blue sky with scattered white clouds.

Polarion 19.3 Trial Installation

POL002 - 19.3

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1. About this guide

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

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

This guide covers:

- The minimum system and other requirements for an evaluation installation.
- How to *install an evaluation* copy of Polarion.
- How to *start up* and *log on* after installation.

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

2. Before you begin

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

- We have provided a simple *Evaluation Installation* track for desktop and personal computers running Windows. It's designed to get Polarion up and running as quickly as possible. You can access all features of the installed product, but you are not running a production installation and some features, such as email notifications, won't work without some initial configuration. These generally won't block your evaluation.
- If you want to evaluate performance and scalability, or include more than a few users, you can 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 Polarion's 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 *Windows* or *Linux*. They are available in HTML and downloadable PDFs at: [Siemens' Doc Center](#).
- You may also be interested in exploring Polarion's cloud-hosted solution Polarion CLOUD: <https://polarion.plm.automation.siemens.com/products/cloud>.

3. What you need

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:

It is assumed that you will access the Polarion portal on the same computer on which it is installed rather than remotely.

- **Microsoft Windows 10**

This is so you can take advantage of the *Evaluation Installation* option provided by the Polarion installer program for Windows, which will get you up and running in a minimum amount of time with an installation that will enable you to check out all Polarion features.

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 Windows Installation*.

Linux option

Polarion also runs on popular Linux distributions and you can evaluate Polarion on Linux if you wish. While automated installer scripts are provided, there is no fast-track install process as there is for Windows. You will need to download the distribution for your Linux distribution and read the **install.txt** file in the root of the distribution.

For a list of supported Linux distributions, see *Polarion Linux Installation* .

Note:

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.

Hardware

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

Requirement	Description
RAM	Minimum 2 GB for basic evaluation. (4 GB or more is better, especially if other applications are running.)
Disk Storage Space	10 GB (More is better. 40 GB is preferred.)
Screen resolution	Minimum: 1280 x 800 pixels

If you want to install Polarion on a server, you may do so. Consult the list of supported Windows server operating systems and hardware requirements in *Polarion Installation for Windows*.

Supported browsers and versions

Polarion ALM is web-based software. For the best experience, always use a supported browser. Polarion may work with other browsers, but only those listed here have been tested and certified as supported. Polarion displays a warning message to users who log in using an unsupported browser.

Browser	Version(s)	Notes
Google Chrome	Latest	
Mozilla Firefox	68 or newer	Version 71 for users hoping to tap into the very latest features and improvements. Organizations or individuals looking for longer-term support with less frequent browser updates should use Version 68 ESR
Microsoft Edge	Latest	
Microsoft Internet Explorer	11	Please be sure to review the additional notes section, below, for important notes about this browser.

Additional notes for Microsoft Internet Explorer

- If running Internet Explorer on Windows Server 2012 (for example, for testing):

- If prompted by the browser, you will need to add **about:blank** as a trusted server.
- You may need to add the local Polarion server and any remote Polarion servers as trusted servers.
- You need to enable JavaScript for the Polarion server.

Note:

The above points do not apply when accessing Polarion running on Windows Server 2012 from other clients.

- Users of Internet Explorer should specify their Polarion server in the Local Intranet security zone while ensuring that Compatibility View is not used.
- There can be performance issues on client computers running Internet Explorer due to browser memory requirements. Occasional restarts of the browser are recommended.

Java runtime

OpenJDK 11 must be installed on the computer that will run Polarion ALM *BEFORE* running the Polarion installer.

Warning:

As of **Polarion 19** Oracle Java SE Development Kit 8 is no longer supported.

Install OpenJDK 11

Warning:

As of **Polarion 19** Oracle Java SE Development Kit 8 is no longer supported.

1. Go to **AdoptOpenJDK 11 (LTS)**.
(AdoptOpenJDK 11 LTS is the recommended OpenJDK distribution because it's continuously tested with Polarion and offers long-term support.)
2. Select the **HotSpot** implementation for **Windows x64** and download the **JDK .zip** file.
3. Extract the downloaded zip file into, for example, `C:\Program Files\Java\`.
It will create a **jdk-11.0.3+7** (version number may vary) folder within the location that you select.
4. Set the **System Variables**:
 - a. Enter Windows **Control Panel** →  **System** →  **Advanced System Settings**.
 - b. Click **Advanced** and then **Environment Variables...**
 - c. Add the **bin** folder location (within the JDK folder) to the **PATH** variable in **System Variables**.

Set **JAVA_HOME**:

- a. Under **System Variables**, click **New**.
- b. Enter **JAVA_HOME** as the **Variable name**.
- c. Enter the **Variable value** as the installation path of the JDK (without the bin sub-folder).
- d. Click **OK**.
- e. Click **Apply Changes**.

Update **PATH**:

- a. Edit the **PATH** variable by adding **%JAVA_HOME%\bin**.
- b. Click **OK**.
- c. Click **Apply Changes**.
`C:\WINDOWS\system32;C:\WINDOWS;%JAVA_HOME%\bin`

5. (Optional) Configure the JDK in your Eclipse, IntelliJ or whatever IDE you develop in.

Tip:

You can see if OpenJDK installed correctly by opening a windows command prompt and typing `java -version`.

(If the result points to the newly installed OpenJDK you're good to go.)

Use of anti-virus (AV) software

When running on server OS platforms that run instances of Polarion server, anti-virus (AV) software intercepts I/O requests to Polarion data structures in order to scan the data looking for virus signatures. This inserts latency (time delay) into all underlying file system read and write operations, which has the potential to directly impact Polarion Server performance, potentially in the magnitude of hundreds of percent.

Also, the AV software may detect false positives in Polarion data structures, which can result in data corruption when the AV software attempts to either re-write the data, or worse, quarantines data files. Any of the various methods used by AV software to deal with false positives could potentially result in data corruption.

Best practice guidance is to use caution when implementing AV software products on a server that hosts Polarion ALM, as it can impose performance and stability issues that may lead to poor response times or data corruption. Where feasible, not running AV software on well protected and/or network isolated server platforms assures that there will be no impact on Polarion server operation. Where AV software must be running, then at minimum it is strongly suggested to exclude the underlying file system supporting a Polarion server's Subversion repository and PostgreSQL database from real-time checking and/or dynamic scanning.

Appropriate security hygiene restricting outside access to the underlying file system supporting a Polarion server's Subversion repository is recommended practice that effectively moderates the need for AV data protections. Assuring that attachments to Polarion data structures (work Items, etc.) are only allowed from sources that *are* subject to AV data protections is an equally prudent security measure that effectively moderates need for AV data protections for Subversion data.

Warning:

Siemens disclaims liability for corruption of any Polarion data structure that is caused by running AV software on platforms supporting a Polarion server.

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, the processor specification and .exe. For example:

PolarionALM_17.1_x64.exe Windows 64-bit distribution for Polarion version 17.1.

The distribution archive contains a setup wizard program, and some required third-party components (Apache server 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 a supported version of Microsoft Office installed. For import, you only need a document saved with a supported version.

For compatible Microsoft Office versions, see: [Appendix: Supported Microsoft Office Versions](#).

Internet connection (optional)

The distribution contains a demo project that needs a set of third-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.

4. Install Polarion

1. If the computer that you are installing Polarion on is running a firewall, disable it for the duration of the installation. This enables the installer to check if the required ports are available.
2. Copy the installer program file and the evaluation license file to the folder Polarion will be installed in. The default **c:\Polarion** is recommended.

Caution:

Install *AdoptOpenJDK 11 (LTS)* before running the Polarion installer.

3. Right-click the  file and run as an  **Administrator**.

Welcome to the InstallShield Wizard for Polarion® ALM(TM) 17

The InstallShield® Wizard will install Polarion® ALM(TM) 17 on your computer. To continue, click Next.

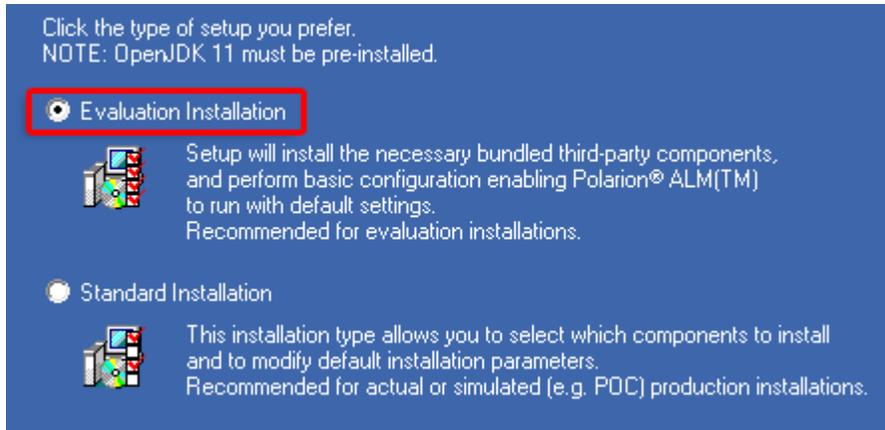
4. On the welcome window, click **Next**.

Please enter your name and the name of the company for which you work.

User Name:

Company Name:

5. Enter a **User Name** and **Company Name** and click **Next**.

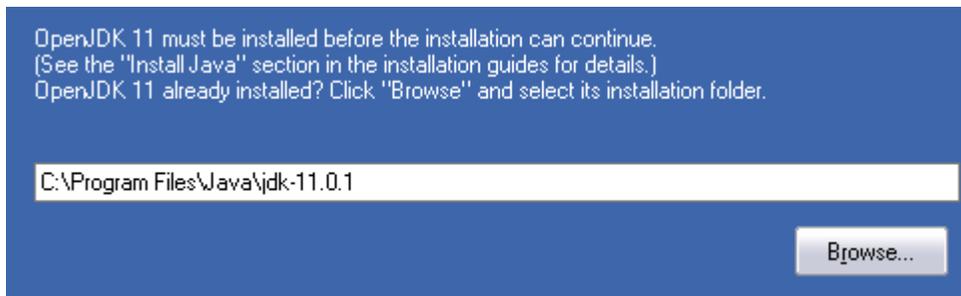


6. Click **Evaluation Installation**.

Caution:

If you change the default **C:\Polarion** installation path;
Pick a location other than the **Program Files** folder.

7. Click **Next**.
8. Click **Browse** and navigate to your Java installation.



Tip:

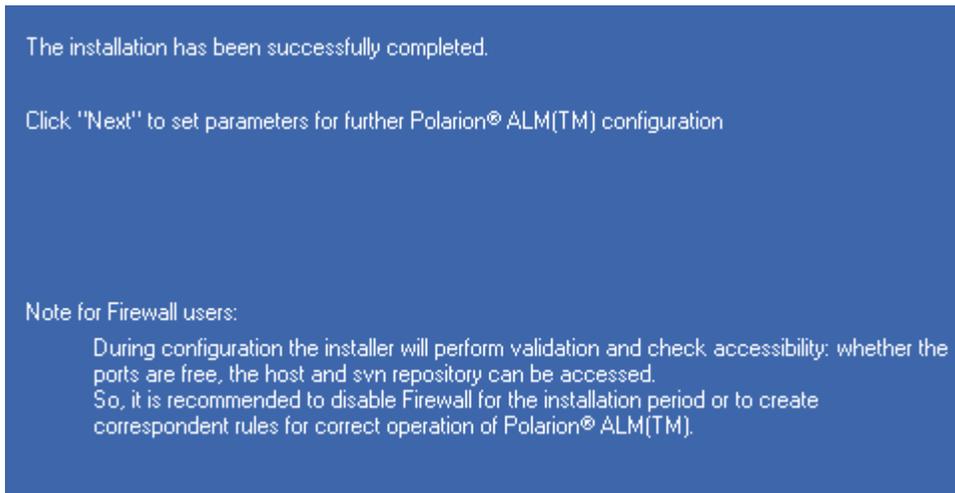
The installer inserts the path from the **JAVA HOME** environment variable.

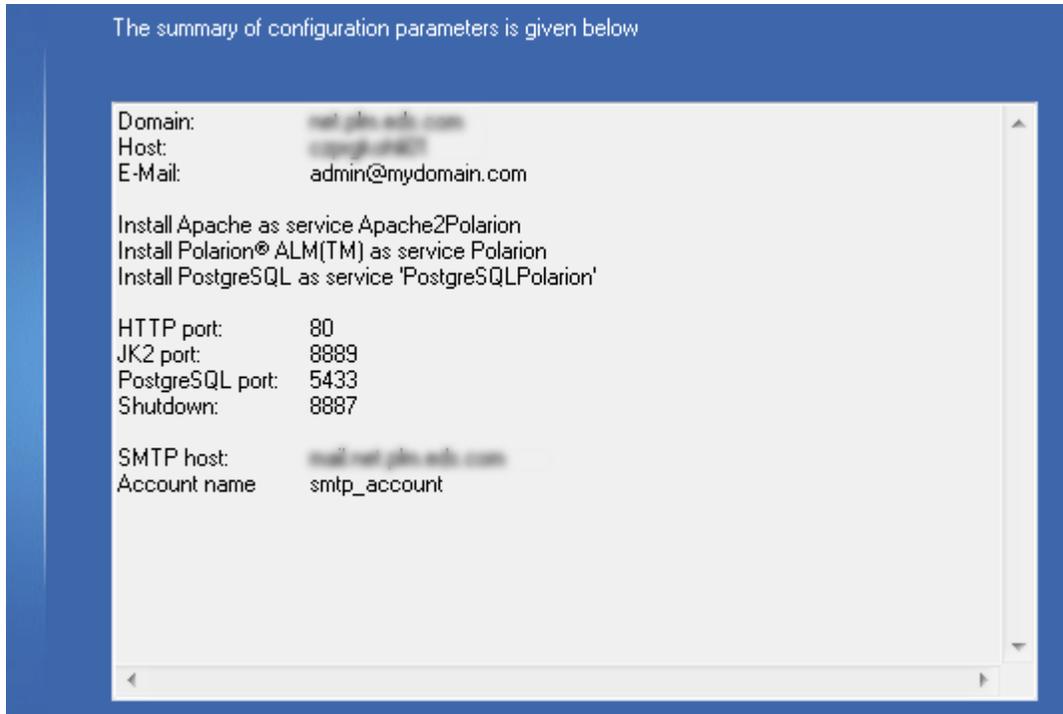
9. Click **Next**.
(If the displayed OpenJDK path is incorrect, the following error message appears.)



Click **Browse**, navigate to the correct path, click **OK** then **Next**.

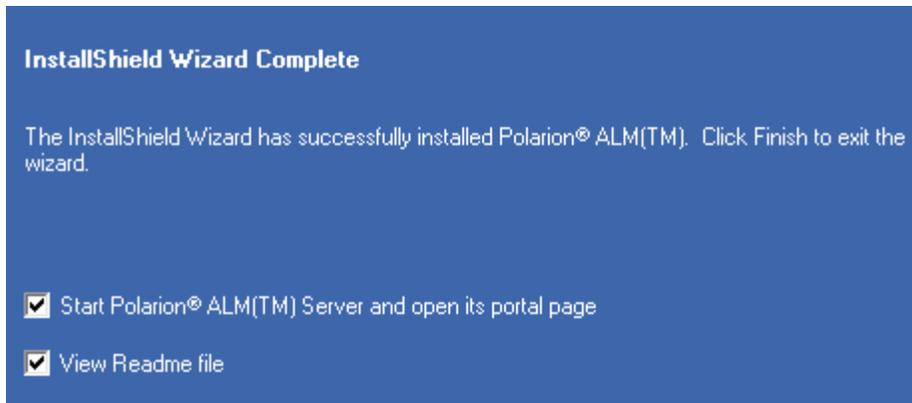
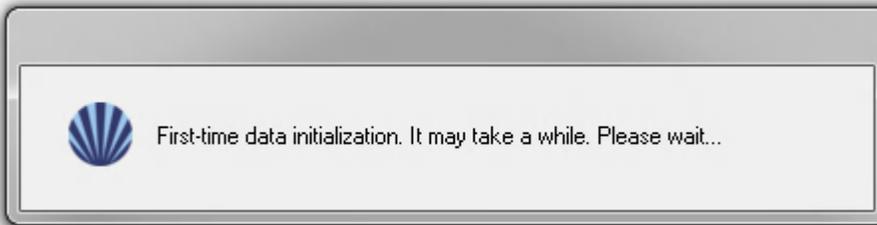
10. Click **Install** to begin the installation with the selected settings, or **Back** to change them.





12. Click **Next** when the configuration summary page above appears.

A series of process pop-ups appears then disappear.
(The longest being the **First-time data initialization** pop-up below.)



(Optional) - **Start Polaron**

Clear the check box, if you do not want Polaron to start automatically.

(Optional) - **View Readme file**

Clear the check box to disable the automatic launch of the README.html.

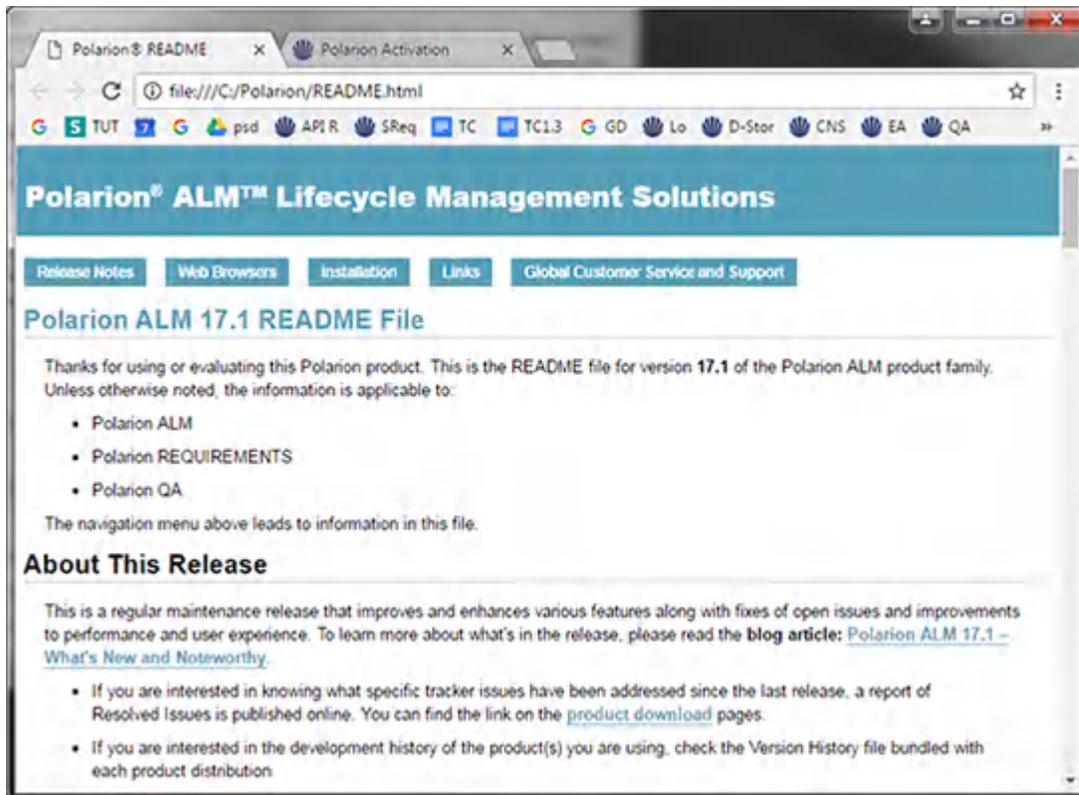
With the default options, the installed Apache server starts followed by the Polaron server and the default web browser that will load and display the portal login page.

If you prefer to skip the option and start Polaron later, see Starting the Polaron Server. If you disabled the computer's firewall, don't forget to re-enable it after the installer terminates.

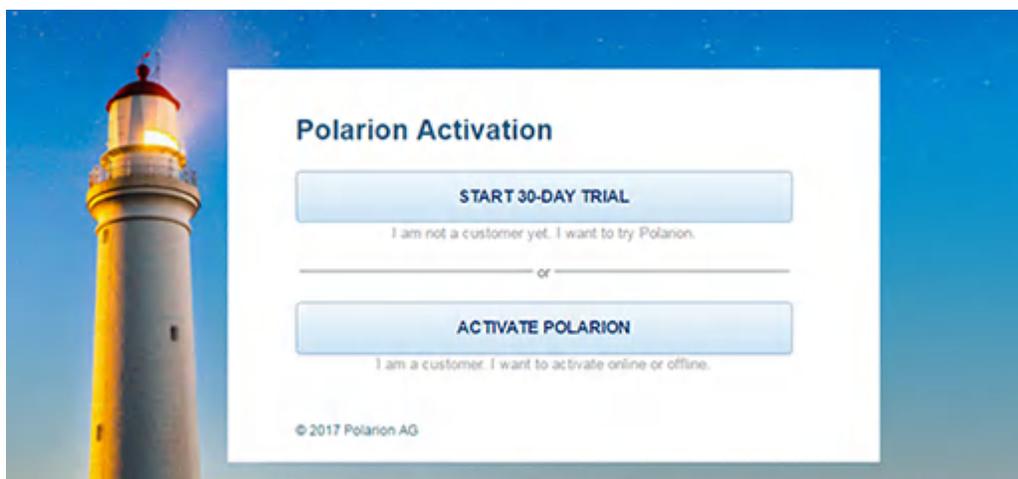
13. Click **Finish**.
14. The Polaron Server starts automatically.
(Unless **Start Polaron Server and open its portal page** on the previous window was cleared.)



15. The Polaron README.html launches in a tab of the default web browser.
(Unless **View Readme file** on the previous window was cleared.)



16. The Polarion logon page launches in another browser window.

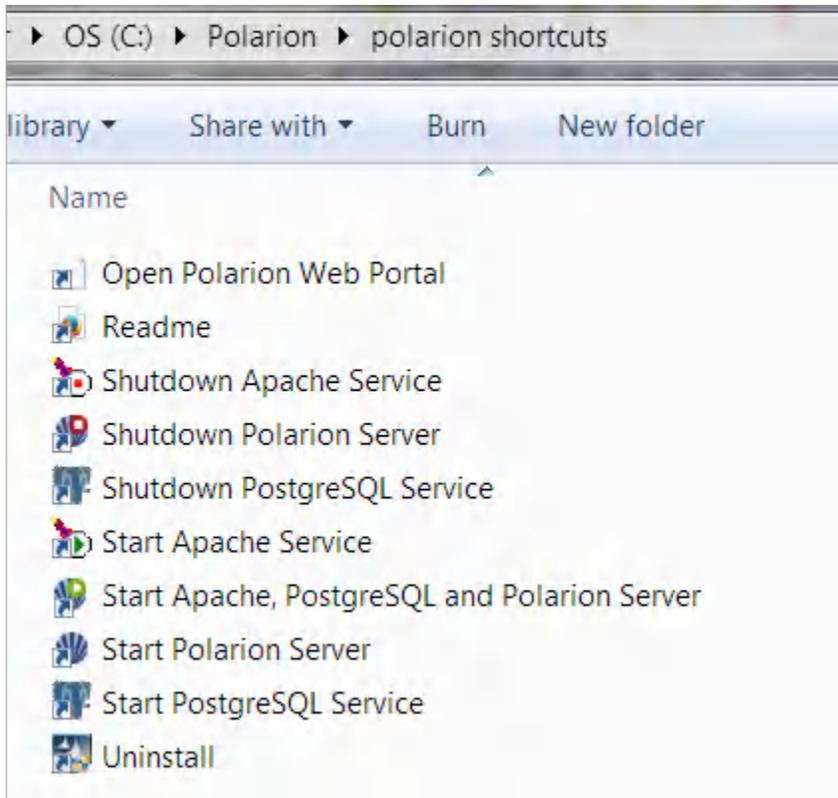


17. Click **Start 30-Day Trial** to log on.

5. Start and stop 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 removes 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

6. Start the Polarion server

For the first time

- When starting the server for the first time, run the  **Start Apache, PostgreSQL and Polarion Server** shortcut.

Caution:

This shortcut should only be used when the Apache Service, PostgreSQL, and Polarion Server are not running.

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

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

Note:

It is normally not necessary to start the Apache or PostgreSQL services 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`

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

The first time the Polarion server starts, the following message may appear in a console window.

Not enough data for startup estimation.

This is not an error message. On startup and re-index operations, Polarion estimates and reports the amount of time the operation will take. You 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.

Log on to Polarion

Once *Installation* and *startup* are complete, log on to the portal.

1. Click the **Open Polarion Web Portal**  shortcut in the folder launched by the **Polarion**  desktop shortcut.
The portal launches the log on screen in your default web browser after the *Apache Service* and *Polarion Server* are started.
2. On the initial launch page, click **START 30-DAY TRIAL**:

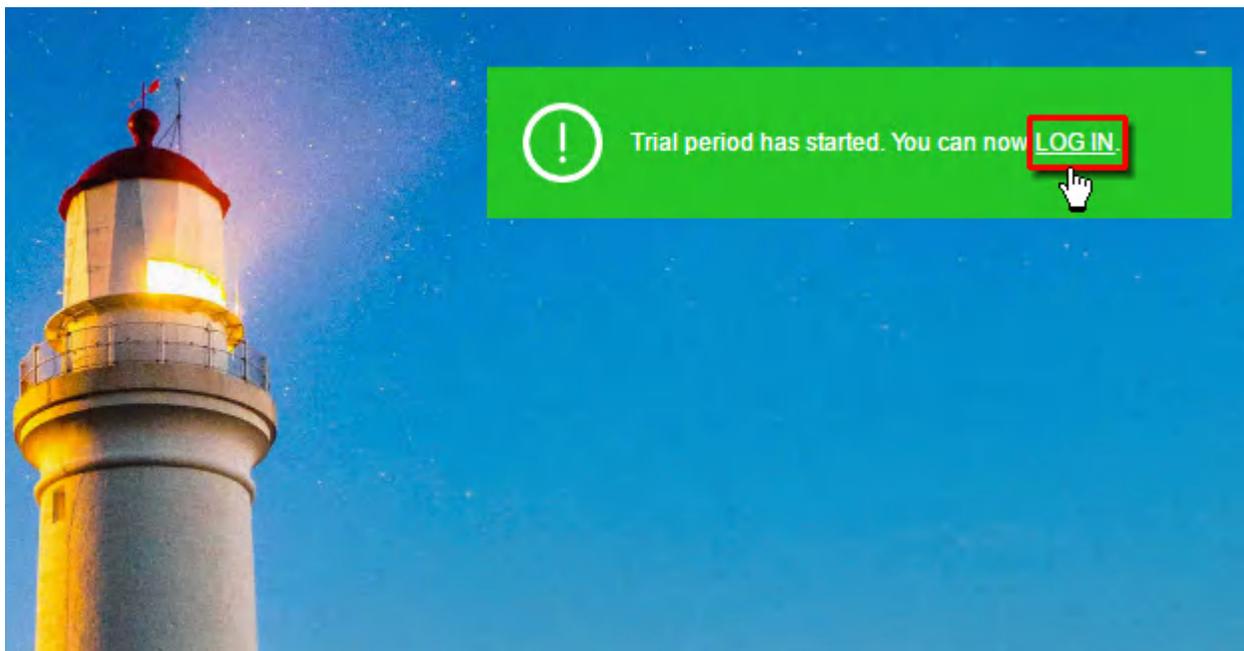
Polarion Activation

START 30-DAY TRIAL
I am not a customer yet. I want to try Polarion.

— or —

ACTIVATE POLARION
I am a customer. I want to activate online or offline.

3. Click **“LOG IN”** when the trial activation confirmation screen appears.



The log on page loads:

SIEMENS PLM Software
Polarion[®] ALM[™]



Username

Password

LOG IN Stay logged in

4. On your first startup, we recommend you log on as the System Administrator user:

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

The System Administrator user has full permissions for everything.

7. First evaluation steps

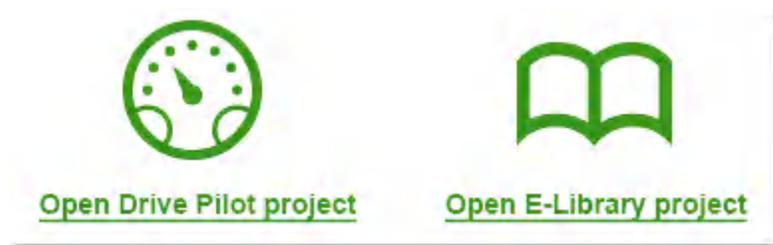
Open and browse the demo project

The Evaluation installation installs two 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 on, you are working in the default repository, and the portal home page is displayed.

This page provides graphical links that 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 always returns you to the project home page.

The navigation panel on the left displays **topics** which lead you to the major features. You can expand the navigation panel and select feature topics you would like to review.

The topics shown depend on the product license you are using.

Create a sandbox project

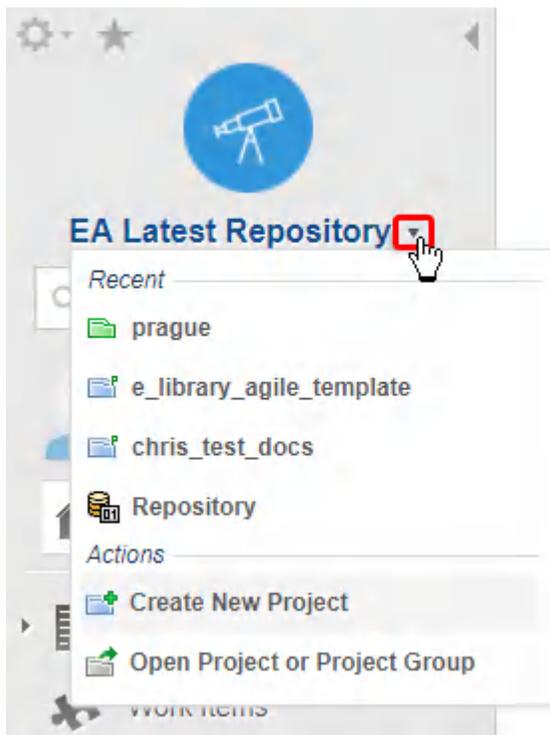
After you browse the sample projects, you can create a sandbox project of your own. Click the Polaron icon in Navigation to return to the portal home page. Then on that page, click the graphical link for creating a new project:



Create New Project

or

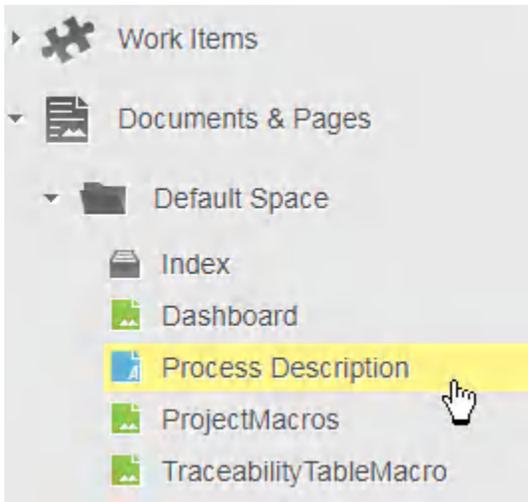
1. In the navigation Window, click the Polaron icon to return to the portal home page.
2. Click  **Create New Project**.



3. In the **ID** field of the box, type something without spaces for example **myNewProject**.
4. In the **Location** field, type **Sandbox**. This creates your new project under the **Sandbox** folder in the repository. Click **Next**.

5. On the template window, use the default selection and click **Next**. It includes the most common features and configuration settings used by the majority of our clients.
6. Go ahead and finish the steps of the new project wizard.

Start with the **Documents and Pages** 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 browse around the  **Administration** interface.

You must log on with administrator permissions in order to access it.

To access Administration:

1. *Log on* as the System Administrator user if you have not already done so.
2. Click  on the top left then  **Administration**.

When working in Administration, the Navigation pane's content is replaced with administration topics, that 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 the 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, get more information from 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 website at <https://polarion.plm.automation.siemens.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.

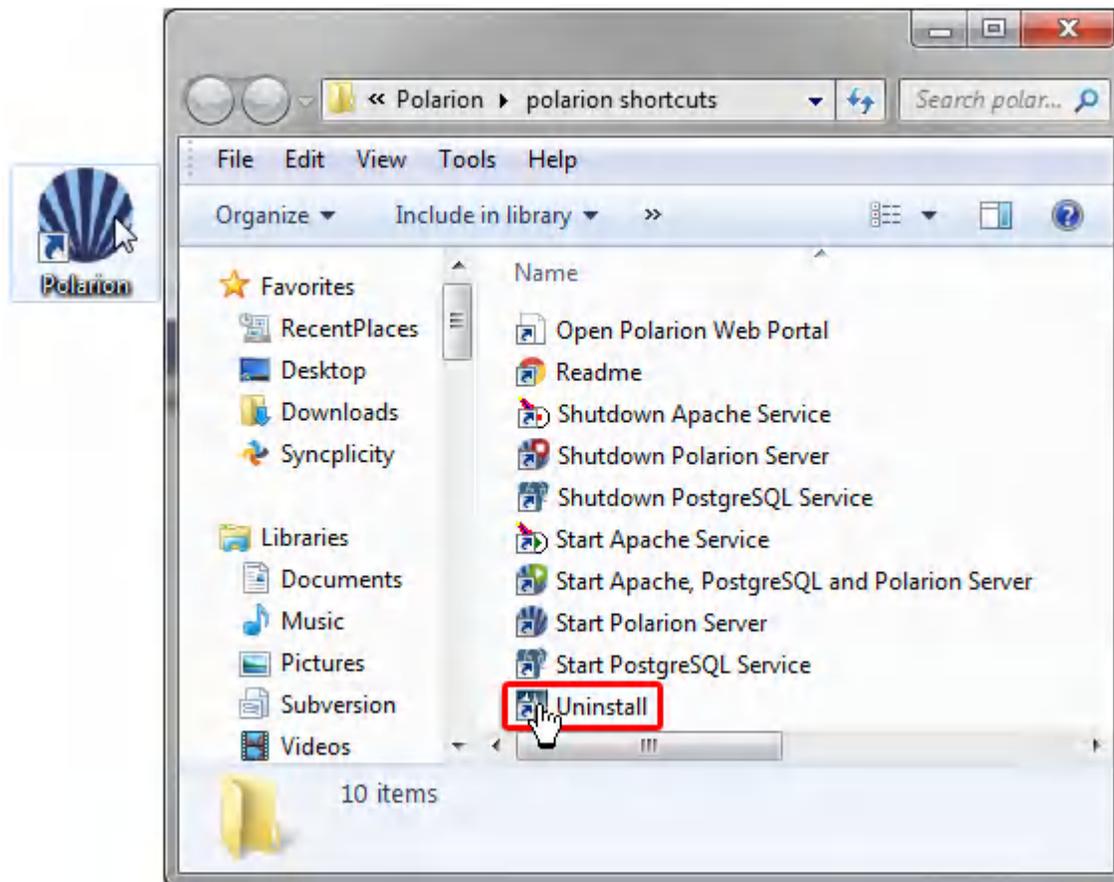
8. Uninstall Polarion

Polarion comes with its own uninstaller that can either be launched via the  **Uninstall** shortcut in the Polarion shortcuts folder or through  *Programs and Features* in  *Windows Control Panel*.

Warning:

Polarion's subversion repository is stored in the **[POLARION]\polarion** folder. Be sure this repository does not contain production data that must be preserved. If it does, make a backup before uninstalling Polarion.

1. Click on the  **Polarion** icon.
2. Click on the  **Uninstall** in the Polarion shortcuts folder.



OR

1. Go to the  *Windows Control Panel*.
2. Select  *Programs and Features*.
3. Select Polarion from the list of Programs and click **Uninstall**.
4. Click **Yes** to confirm the uninstallation when the warning screen appears.
5. The uninstall process begins.

Polarion and bundled components were successfully uninstalled.
The Subversion repository and files created during Polarion operation were not deleted.
Please select one of the options below:

- Do not delete any remaining files
- Keep the data folder but delete the configurations and program files changed after installation
- Delete ALL files including project builds, generated reports and Subversion repository

6. Select what files, if any, to keep and click **Next**.

Uninstallation Complete

InstallShield Wizard has finished performing maintenance operations on Polarion.

7. Click **Finish**.
8. Polarion is successfully removed from your system.

Note:

OpenJDK will need to be uninstalled separately.

9. Appendix

Product download URLs

- **Polarion® ALM™**
<https://polarion.plm.automation.siemens.com/downloads/alm>
- **Polarion® REQUIREMENTS™**
<https://polarion.plm.automation.siemens.com/downloads/requirements>
- **Polarion® QA**
<https://polarion.plm.automation.siemens.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	The Home topic provides access to the Home page of either the current project, if you have a project open, or the repository if you are working in that scope after opening the repository.	ALM, REQ, QA
Documents & Pages	The Documents and Pages topic provides access text-based project artifacts such as specifications, reports, and informational content.	ALM, REQ, QA
Plans	The Plans feature enables teams to easily plan their work into releases. Releases can be internal or external. For example, they might be "iterations" or "milestones" which are internal to the development organization, and "releases" which are provided to customers/users.	ALM, REQ*, QA*
Work Items	A Work Item is the Polarion term for an artifact of the development process that is waiting to be implemented, is in progress, or has been implemented.	ALM, REQ, QA
Test Runs	Lets you access, manage and create Test Runs and Test Run templates.	ALM, QA

Topic	Description	Availability
Baselines	Baselines capture and preserve the state of your project at some point in time. Baselines are typically created for major development milestones and for releases. It is possible to generate comparison reports that compare two baselines and report on the changes that took place between the earlier and the later baseline.	ALM, REQ
Dashboard	The Dashboard topic is a key topic for managers and other stakeholders who need to keep an eye on the status of development, from single projects, to divisions or departments, on up through the enterprise. The topic provides dashboards in several information scopes that roll up actual progress data maintained in the repository as people begin and complete tasks, presenting it in charts, graphs, and other meaningful ways that help people understand the true status of development.	ALM
Quality	The Quality topic provides dashboards with some key statistics and results of audits and metrics that can be of interest to QA managers and teams. The information is "live" based on the actual state of work on the projects that feed data into the dashboard.	ALM
Reports	The Reports topic provides access to a number of reports related to project source code, and enables you to explicitly launch report calculation.	ALM
Monitor	The Monitor topic provides access to information about currently-running and scheduled jobs. Users with the required permissions can schedule jobs and explicitly launch jobs.	ALM, REQ, QA
Repository Browser	The Repository Browser topic provides access to the integrated Subversion repository and provides some basic client functionality including browsing, downloading, and committing locally changed resources (you must have permissions for committing to the repository).	ALM, REQ, QA

* Create is only available with an ALM license.

Evaluating on a large scale

If you need a large-scale server environment with multiple clustered servers and fail-over capabilities, multiple repositories, and so forth and would like to set up this kind of environment to evaluate Polarion, see *Polarion Enterprise Setup* .

Polarion's sales team includes expert professional engineers who are 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:

<https://polarion.plm.automation.siemens.com/company/contact>

Supported Microsoft Office versions



Feature	Action	Ext.	Format	2003	2007	2010	2013	2016	2019
LiveDocs (2011)	Word Import & Round-trip	.docx	DOCX	✗ ²	✗ ¹	✗ ⁴	✗ ⁴	✓	✓
	Excel Import & Round-trip	.xlsx	XLSX	✗ ²	✗ ¹	✗ ⁴	✗ ⁴	✓	✓
LiveDocs (2010)	Excel Export	.xls	XML	✗ ³					
	Word Export	.doc	XML	✗ ³					

Supported ✓

Unsupported ✗

- Beginning with Polarion 18, Microsoft Office 2007 is no longer supported in Polarion LiveDocs™.

Caution:

(The only exception is Polarion's internal templates. If updated in Microsoft Word, they should still be saved in the 2007 .docx format to ensure that content like shapes import/export as expected.)

- Beginning with Polarion version 2014-SR1, Microsoft Office 2003 is no longer supported in Polarion LiveDocs™.
- Prior to Polarion version 2011, **Live Documents** referred to Microsoft Office Word and Excel documents based on special document templates that could define and store Polarion **Work Items**. Beginning with version 2011, the technology was completely refactored, but backward compatibility was maintained. Beginning with Polarion version 2014-SR1, support for this legacy format was dropped completely and the feature was renamed as **LiveDocs**.
- Beginning with Polarion 19, Microsoft Office 2010 and 2013 are no longer supported in Polarion LiveDocs™.

10. About Polarion® ALM™

Polarion® ALM™, a **Siemens Company**.

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.

Polarion was acquired by Siemens PLM Software in January 2016, expanding their support for the growing ALM market. The acquisition is the culmination of a relationship between Siemens and Polarion that started several years ago through which Siemens has been an investor, a partner, and a Polarion customer.

What does this mean for you? Everything in terms of possibilities. Your favorite Polarion products and solutions all continue to be available, and remain the market leaders in ALM. What is new and exciting is the synthesis of PLM and ALM into an integrated solution set that addresses the many challenges to innovation confronted in the 21st century.

This powerful combination helps fulfill Siemens PLM Software's vision for Systems Driven Product Development, while enabling Polarion to further expand its market leadership.



Handy links

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