

ProActive Assistant Quick Start

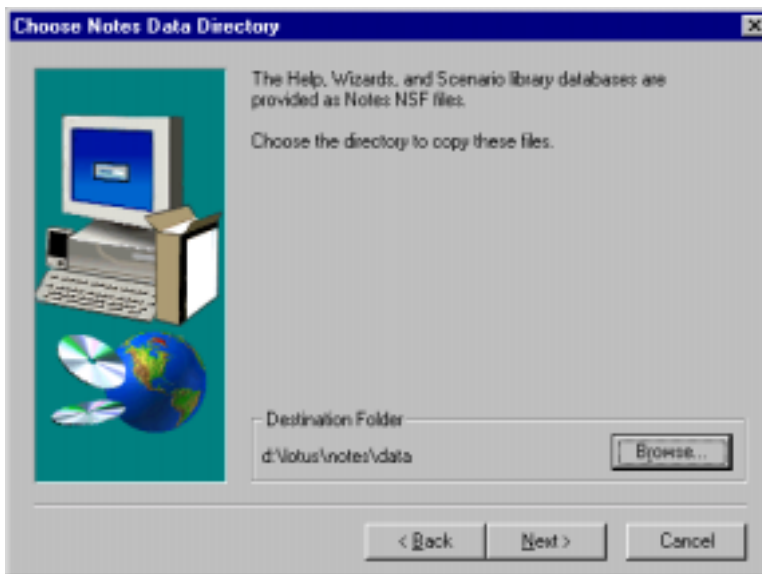
Use this "Quick Start" document to accelerate the learning process and shorten the time required to become proficient with ProActive Tools. **Step 1** guides you through installation of ProActive Tools. **Step 2** guides you through running the "Out-of-the-Box" scenario for ProActive Assistant. Running this scenario without error indicates a successful installation and provides an overview of what ProActive Assistant does and how it works. **Step 3** looks at the test results. **Step 4** guides you through simple modifications, which allow ProActive Assistant to run in your environment.

Step 1 - Installing ProActive Tools

ProActive Tools software is easy to install and only requires a few minutes. There are several installation options from which to choose. We recommend that new users accept the first install option, "Default - Install ProActive Tools (Entire Toolset)."

To install ProActive Tools, follow the steps below.

1. Check to be sure Notes is installed on the workstation. If not, install Notes before installing ProActive Tools.
2. Close all other programs.
3. Insert the installation CD in your CD ROM drive to launch the setup program.
4. Click Next to Accept the "Welcome" and "License" panels.
5. Enter the Notes\Data directory for the workstation. This is the directory where the sample databases provided with the product will be installed. The "Out-of-the-Box" scenario is coded to open two databases in the Notes\Data directory. If the databases are installed elsewhere, a Notes error will pop up when ProActive Assistant runs, just as it would if a real user typed in a database path/name that did not exist. The Install procedure defaults to the directory with the first instance of Names.nsf found on your workstation. This is usually correct unless you have multiple copies of Names.nsf.

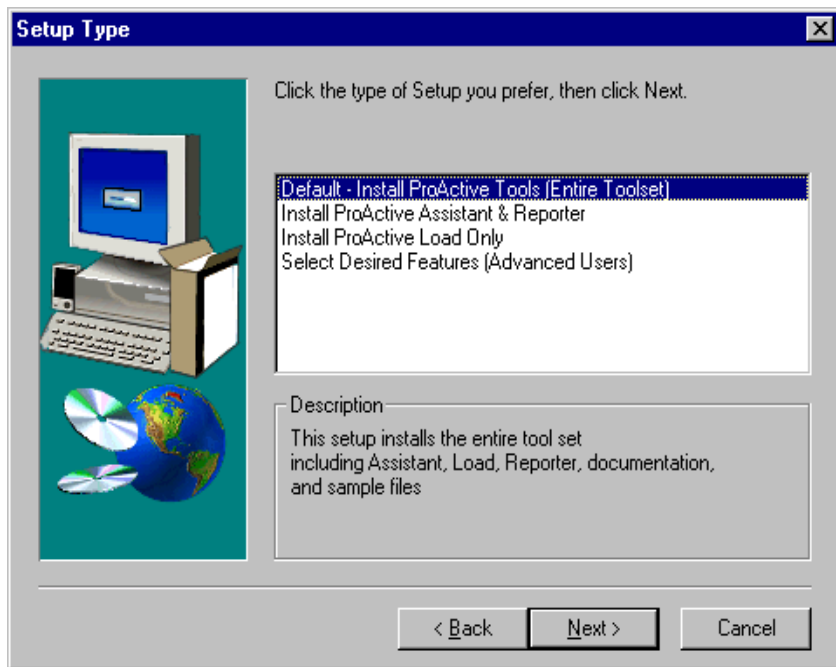


Sample.nsf, an R4 database, is copied to the specified Notes\Data directory. The sample scenarios installed with the product look for Sample.nsf in this directory.

PAToolsScenarioLibrary.nsf is also an R4 database that is copied to the directory you specify.

Awizard.nsf and **Ldwizard.nsf** are R4 databases copied to this directory, but not accessed by the "Out-of-the-Box" scenario. These databases provide an easy method for building scenarios. See Chapter 7 in the User Manual for more information.

6. Select one of the four setup types as shown in the screen capture shown below.



“Default - Install ProActive Tools (Entire Toolset)” installs the entire toolset including Assistant, Load, Reporter, documentation, and sample files. This option is recommended for new users.

“Install ProActive Assistant & Reporter” installs Assistant, Reporter, documentation, and sample files.

“Install ProActive Load Only” installs Load, documentation, and sample files.

“Select Desired Features (Advanced Users)” allows advanced users to install desired components.

7. Choose a program directory for the installation. The default is C:\Program Files\PATools.
8. Select a Program Group for a shortcut. The default is "G2's ProActive Tools".
9. A final screen reviews the choices made. Use the "Back" buttons to return to previous screens.

PAToolsDoc.pdf, installed in the PATools directory, is a complete software manual and contains the same information as the printed version. Adobe Acrobat 4.0 or higher is recommended for viewing this file.

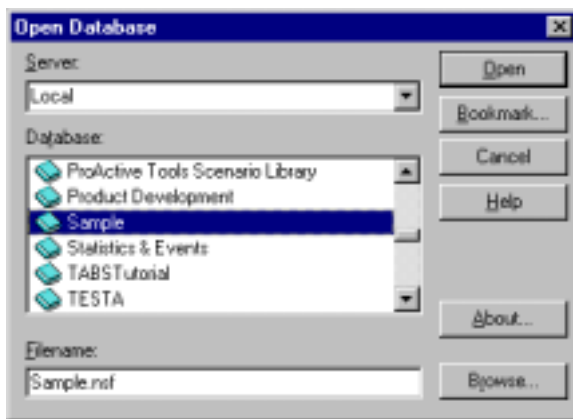
Step 2 - Running the “Out-of-the-Box” scenario for Assistant



The “Out-of-the-Box” scenario demonstrates the basic functionality of ProActive Assistant and when run without error, shows that the product has been successfully installed.

This scenario can be run without modification if the Notes\Data directory was correctly named in the installation, as described above.

It is always a good practice to open Notes databases manually from the Notes client to make sure that they have the path and file name expected by the scenario. Use the Notes menu **File\Database\Open** to open Sample.nsf, as shown in the screen capture to the left.



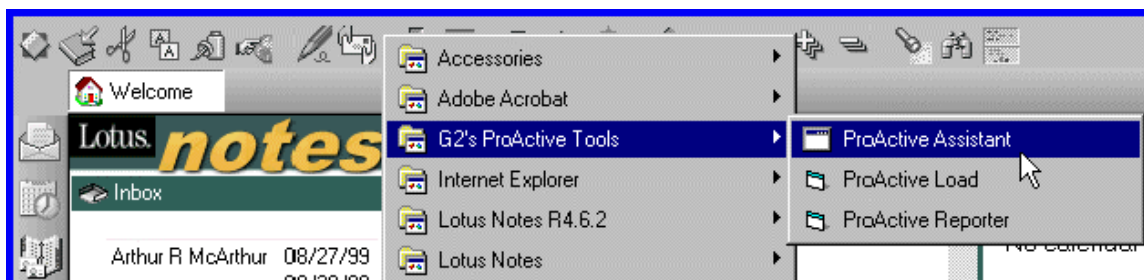
The filename in the Notes Open Database Infobox must be the same as the value shown for the DBName Parameter in the General Section of the scenario. In other words, ProActive Tools scenarios reference databases relative to the Notes default data directory, just like it works in Notes.

In the “Out-of-the-Box” scenario’s General Section, **DBName = Sample.nsf**.

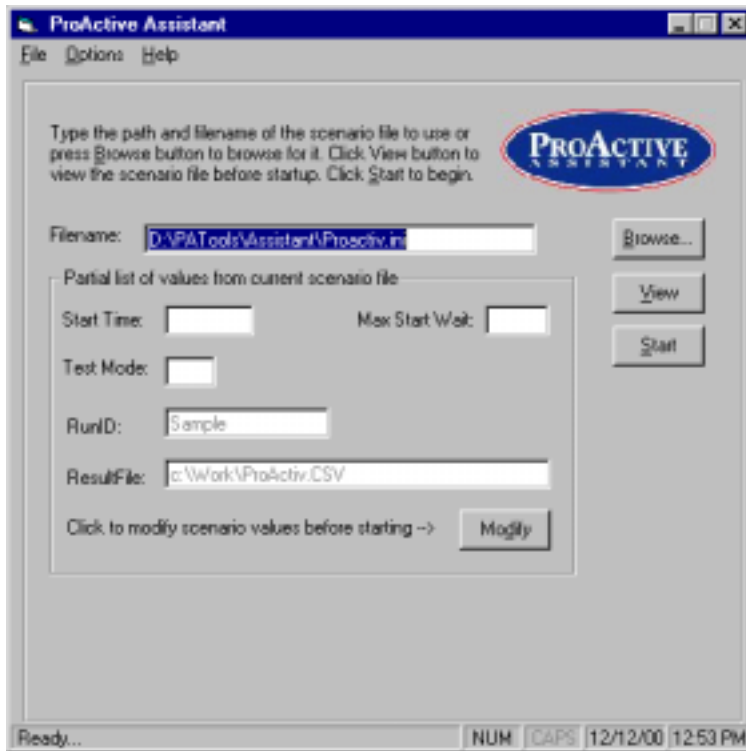
If you cannot locate Sample.nsf, either reinstall ProActive Tools and select the first option that installs all features, or copy the database from the documentation directory of the CD to your Notes Data directory.

The “Out-of-the-Box” scenario also opens PATScenarioLibrary.nsf, another R4 database. The Scenario Library provides example scenarios that can be easily modified to run in your environment. These scenarios help new users understand ProActive Tools’ simple scripting language. The Scenario Library is installed in the Notes\Data directory and can be found in the Documentation directory of the CD.

With the Lotus Notes client running, launch ProActive Assistant by using the shortcut created when the software was installed. Unless you changed the default, you will find the shortcut shown below.



Use ProActive Assistant's **Main Screen** to select and start the scenario.



Select a scenario to run.

The file named Proactiv.ini , the “Out-of-the-Box” scenario, should be visible in the Filename window. To change the filename, use the **Browse** button, or type the path and filename of the desired scenario directly into the Filename window.

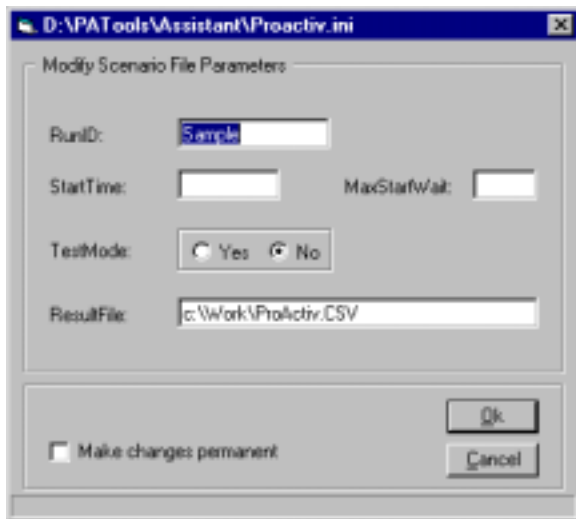
The “Out-of-the-Box” scenario, named **Proactiv.ini**, is selected when the program is first run.

View the selected scenario.

The view button allows you to view the selected scenario. Edit the scenario with an ASCII text editor, such as Notepad.

Click Start to run the scenario.

Use the **Modify Screen** to edit key values in the scenario without using a text editor.

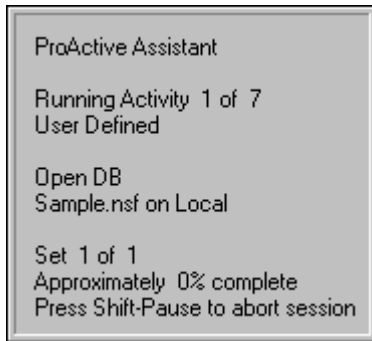


Click the **Modify** button to change the values shown at the right. Notice that the ResultFile parameter is set to c:\Work\ProActiv.CSV, but can be changed as desired. The RunID is set to Sample and appears in the first column of the output file. TestMode can be set here as well, when TestMode = Yes, execution of the scenario is paused after each Notes event is completed by ProActive Assistant. This allows you to step through the scenario at your own pace.

For the first run, leave **TestMode = No**.

Changes made on the Modify screen can be written to the scenario file by checking **Make changes permanent**.

Run the “Out-of-the-Box” scenario several times to gain an understanding of how ProActive Assistant reads a scenario and drives a Notes client. Toggle Test mode to yes to step through the scenario event by event.



When ProActive Assistant runs, the **Status Screen** displays at the bottom right corner of the workstation monitor. The “Out-of-the-Box” scenario contains seven activities. ProActive Assistant reads the scenario, and drives the Notes client just like a real Notes user would. Databases are opened, views are opened and navigated, and documents are created. Watch the monitor and you can follow each activity as it runs. ProActive Assistant will post a status screen at the bottom right corner of the workstation’s monitor that provides information about the scenario’s progress. The Open DB event for the first activity is shown in the screen capture.

Press Shift-Pause on the keyboard to manually stop the scenario at any time.

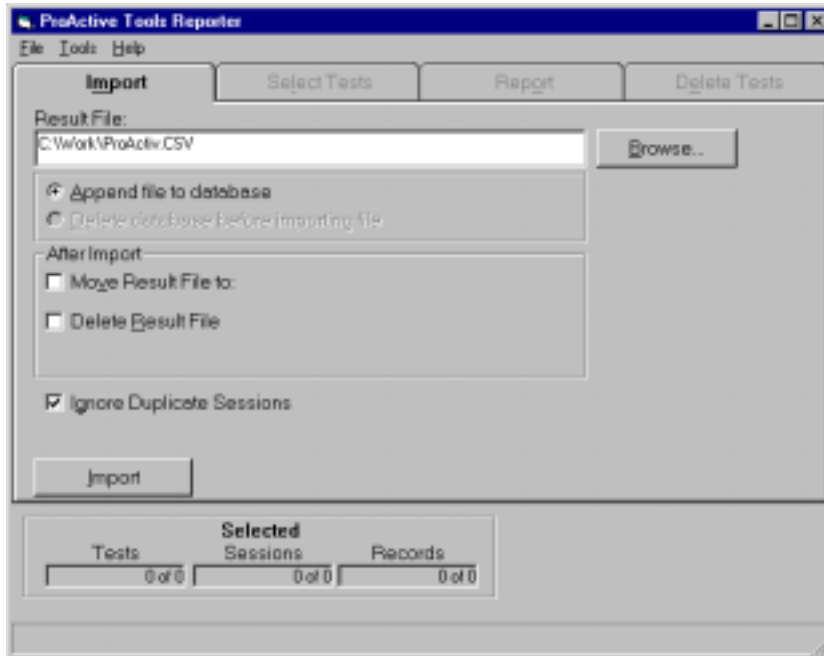
The scenario will run for about five minutes. When it completes, ProActive Assistant displays a dialog box and releases control of the workstation. This is a good test of your installation of ProActive Assistant and the first step to understanding ProActive Tools scripting language.

Step 3 – Review Results file and Create a Report

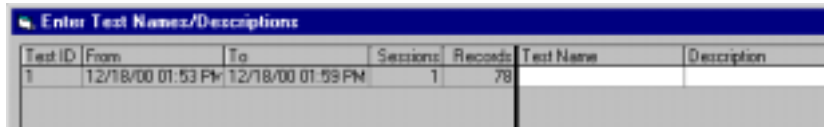
Results are written to the output file, C:\Work\Proactiv.csv by default, or as specified in the General Section of the scenario. The output file is a Comma Separated Variable file with one record written for each Notes event executed by the Notes client as the scenario runs. The response time for each event is recorded in seconds and is the key value in the output. The output can be viewed with a text editor, but is much easier to read when opened with a spreadsheet program, such as Lotus 123. The “Out-of-the-Box” scenario writes to C:\Work\Proactiv.ini as specified in the General Section’s ResultFile parameter. The output file contains raw data formatted structured as shown below.

Run ID	Run ID of the test session
Date	Date of the event
Time	Time of the event
Activity	Activity (e.g., Read Documents)
Event	Event (e.g., Open Database)
Client	Client
Server	Server
Iteration	Iteration number
Response time	Time to complete the event in seconds (e.g., 11.234)
Completion Code	Indicates success or failure of the event 0 - OK 1 - Server Not Responding 2 - Lotus Notes Error Message 3 - Unknown Lotus Notes Message
Comments	Additional information about the event

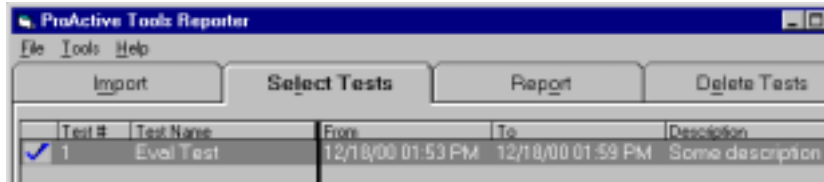
The ProActive Tools Reporter is a reporting tool for analyzing ProActive Assistant results files. After tests have been run, they can be imported into Reporter's database where predefined reports, or custom reports can be generated. Typically, Reporter is used to compare test runs made by ProActive Assistant. After running the "Out-of-the-Box" scenario several times, follow the steps below to import the results into Reporter and quickly create reports. Open ProActive Reporter and follow the steps below:



1. Browse to the output file and click the **Import** button to add the tests just run to Reporter's database.



2. On the next screen, provide a name and description for each test added.



3. Select tests to be included in the report by clicking the box to the left of each test to be added. Optionally, select one test that the Reporter will use as a baseline.



4. Highlight the Report Type and then the Report Name. Select **Analysis Of Events**, as it is one of the most useful reports.

5. Click the **Display** button to view the report.

Step 4 - Modify the “Out-of-the-Box” scenario to run against a Notes server

Open the ProActiv.ini file located in the directory where you installed ProActive Assistant. Typically this will be <Local Drive>:\Program Files\PATools\Assistant. Scenarios are simple text files that can be edited with a text editor like Windows NotePad. Notice that the ProActive Assistant scenario contains 3 main sections; General, Activity Sets, and Activity Routines. The General Section contains global parameters and information for the scenario. The Activities Sets Section calls the activities to be run, defines the order, controls looping, and sets sleep times between activities. The Activity Routines Section contains the detail for each activity. Each activity contains parameters that define a set of Notes events. In short, the scenario contains the script for the test that runs on the Notes client. As the test runs, response times for the Notes events triggered are recorded in the output file.

The “Out-of-the-Box” scenario operates against Sample.nsf installed locally on your workstation.

1. In the General Section, change the Server = parameter from Local to your Notes server name. The Server parameter is global and defines the server for all activities in the scenario. Changing the server value here, will assign the listed server for all of the activities in the scenario.

```
*****
GENERAL SECTION
*****

[General]
RunId           = Basic
Path            = C:\Notes
NotesIniPath    =
Client          = @Notes.ini.KeyFileName
Server          = Local
Server          = YourNotesServerName
RunType        = Count
```

2. Copy Sample.nsf and PATScenarioLibrary.nsf to the data directory of the Server named above.
3. Open the both databases on the server manually, to be sure the Notes client can open them. Use File-Database-Open and supply the DBName parameter used in your scenario.
4. Launch ProActive Assistant and run the scenario. The scenario should run as it did before, except that now the databases should open on the named server.

“Out-of-the-Box” scenario

Scenarios are simple ASCII text files composed of three sections; General, Activity Sets, and Activity Routines. The General Section contains global information for the scenario. The Activity Sets Section defines the activities to be run, the order, and looping information. ProActive Assistant can have only one Activity Set, but ProActive Load may have multiple Activity Sets. The Activity Routines Section contains detail for each activity called in the Activity Sets Section.

In the “Out-of-the-Box” scenario below, the Activity Sets Section “Calls” seven activities. All text in the scenario preceded by an apostrophe is ignored when the scenario runs.

```

' *****
'
'             GENERAL  SECTION
' *****
[General]
RunId          = Sample
Path           = c:\notes
NotesIniPath   =                               ' Use this notes.ini file
Client         = @notes.ini.keyfilename        ' Get user name from Notes.ini
'Server        = @notes.ini.mailserver         ' Server name from Notes.ini
Server         = Local
'RunType       = Timed                        ' Valid types Timed or Count
'TestDuration  = 1
RunType        = Count
NumSets        = 1
SleepTime      = 0                          ' Sleep time (seconds) between iterations
CloseNotesWhenDone = No                      ' Do not terminate Notes at end of session
MaxWait        = 500                         ' Max time (mseconds) to wait for idle

ResultFile     = c:\Work\ProActiv.CSV
MailResults    = No                          ' Send result file as attachment
MailResultsTo  =
MailDBName     =                             ' Send from this database
MailServer     =
DeleteResultFile= No                         ' Delete file from disk after
                                                ' successfully sending the result
'StartTime     = 17:30                        ' Start the session at 5:30 PM
'MaxStartWait  = 5                           ' If the ProActive Assistant was
                                                ' initiated after 5:30 PM, but before
                                                ' 10:30 PM, begin immediately; if after
                                                ' 10:30 PM, wait until 5:30 PM tomorrow

NotesEXENAME   = Notes.exe
DBName         = Sample.nsf                  'Default database

```



```

*****
'
      Activity Sets Section
*****

```

[Activities]

```

'Activities are called in the order listed in this section.
'Detail for activities is in the Activity Routines Section.
'Place an apostrophe before and the related routine will be ignored.

```

```

Call          = SampleOpening          '1st activity run
SleepTime     = 1
Call          = SampleRead             '2nd activity run
SleepTime     = 1
Do 2 Times    'Several kinds of Do Groups can be used
  Call        = SampleFind             '3rd activity run
End            'This ends the Do.
SleepTime     = 1
Call          = SampleMail             '4th activity run
SleepTime     = 1
Call          = SampleOrders           '5th activity run
SleepTime     = 1
Call          = ReadLibrary            '6th activity run
SleepTime     = 1
Call          = SampleClosing          '7th activity run
SleepTime     = 1

```

```

*****
'
      Activity Routines Section
*****

```

[SampleOpening]

```

Activity      = User Defined           'User Defined type
RunId         = Opening
Command       = Open Database          'Defaults to DbName in General
Command       = Open View
View          = Intro PATools          'Opens this view
Command       = Navigate
NavigateOption = Bottom                'Moves to bottom of view
Command       = Navigate
Up            = 1                      'Navigates up 1 document
Command       = Open Document
Command       = Sleep
SleepTime     = 20                     'Sleeps for 20 seconds
Command       = Close Document
Command       = Close Database

```

```

-----

```

[SampleRead]

```

Activity      = Read Documents         'Read Documents type
RunID         = SRead
NumberOfDocuments = 8
ReadTime      = 3
      'Basic Notes functions can be scripted with very few lines
      'of code when using basic activity types like Read Documents.
-----

```

```
[SampleFind]
Activity      = Find                'Find Type
RunId         = Sfind
View          = Intro PATools      'Opens this view
FindString    = ProActive Assistant 'Find this string
```

```
SleepTime    = 1
```

```
'-----
```

```
[SampleMail]
'Create Mail documents in the Sample database,
'and save them without sending them.
```

```
Activity      = Mail                'Mail Type
NumSets       = 3
'Defaults to DbName in General
'Server        = @Notes.ini.mailserver 'Gets Server from Notes.ini
Server        = local
```

```
SendTo        = ProActive@ProactiveTools.com; Save=Yes; Send = No
```

```
SendSubject    = Mail from ProActive Assistant
```

```
Text1 = "Iteration Number <Iteration><Enter 2>"
Text2  = "This document was sent from ProActive Assistant"
Text3  = " by G2 Associates on <Date> at <Time>.<ENTER>"
Text4  = "The Mail Activity composed this memo and sent it to<ENTER>"
Text5  = "recipients specified in the parameter file, PROACTIV.INI."
        'The numbers following Text parameters are optional
        '(Text1, Text2, Text3, etc) and ignored by ProActive Assistant.
```

```
'-----
```

```
[SampleOrders]
```

```
Activity      = User Defined        'User Defined type
NumSets       = 2
```

```
Command       = Open Database      'Defaults to DbName in General
View          = Orders              'Open this view
```

```
Command       = Open Form
Form          = Order Form          'Open the Order Form
```

```
Command       = Enter Text          'Angle brackets, < >, enclose Text
Parameters
Text          = Name = Test User<Iteration> 'Iteration increments as
                                                'the activity repeats according to the
                                                'RunType value Timed or Count (Test
                                                'User1, Test User2, Test User3, etc.)
```

```
Text          = Address1 = 123 Main Street
Text          = City      = McLean
Text          = State     = VA
Text          = Zip       = 22222
Text          = Phone     = 555-555-1212<Pause 2500>
```

```
Field      = Product      = ProActive Tools, Assistant, Load
Text       = <Pause 1000>  'Use Pause to slow the execution of the scenario
Text       = <Action ProActive Assistant Information>
                                     'Pushes action button named
Text       = <Pause 4000><Space>          'ProActive Assistant Information
Text       = <Down 3><Space><Pause 4000><Space>          'Push form button
Field      = Description = Repeat this text.    'Text that is repeated
FieldSize  = Description = 500-1000            'Number of characters repeated
Field      = Attachments = ProActive Assistant can attach files.
Text       = <Enter>To enable the attachment, edit Attach parameter in the
Text       = <Enter>SampleOrder activity.  The path and file name for the
Text       = <Enter>file to be attached must be correct for your system.
Text       = <Menu Edit\Select All><Menu Text\Bold><Menu Text\Color\Red>
Text       = <Menu Edit\DeSelect All><Pause 5000>
'Command   = Attach File          'User Defined command
'Attach    = d:\PATools\Assistant\Sample5.ini  'Attach this file
'Command   = Enter Text
'Text      = <Pause 4000>
Command    = Close Document
Save       = Yes
Command    = Sleep
Sleeptime  = 1
Command    = Close Database
'-----
```

[ReadLibrary]

```
Activity    = Read Documents          'Read Documents type
DbName      = PATScenarioLibrary.nsf
View        = Overview
NumberOfDocuments = 1
ReadTime    = 30
'-----
```

[SampleClosing]

```
Activity    = User Defined            'User Defined type
RunId       = Message
Command     = Open Database           'Defaults to DbName in General
Command     = Open View
View        = Intro PATools
Command     = Navigate
NavigateOption = Bottom
Command     = Open Document
Command     = Sleep
SleepTime   = 60
Command     = Close Document
Command     = Close Database
'-----
```

Contact Us

Contact us with questions about installation, or using ProActive Tools. We can help you determine how to use our tools in your environment.

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