

Blueprint 6.2 Upgrade Guide

### Contents

Blueprint Upgrade Guide	
Overview	
Important Notices	
System Requirements	
Upgrade Steps	
Step 1: Back up your data	4
Step 2: Run BlueprintSetup.exe on the web application server	5
Step 3: Blueprint client setup	
Configuring elevated trust in-browser	
Using group policy to push the elevated trust in-browser configurations to Windows centralized manner	computers in a 9
Manually configuring a computer to run with elevated trust in-browser	
Appendix	
About allowing Blueprint to collect phone home data	12
What data is collected?	
Configuration utility command reference	
Web Application Server Configuration Parameters	13
Database Server Configuration Parameters	
HP ALM Legacy Connector Configuration Parameters	
Phone Home Configuration Parameters	15
Maintaining the Blueprint database	16
Setting up a new database	16
Setting up federated authentication	
Setting up email notifications	
Setting up review notifications	
Setting up e-mail integrated discussions	
Adding users to Blueprint	19
Adding all Active Directory users	
Adding a database user in Blueprint	
Creating license groups	20
Creating projects	21
Granting access to projects	
Web.config reference	
Installing services manually	27
Adding a database user (command line)	

Setting up services (single-server setup)	
Setting up 64-bit job services (single-server)	
Step One: Configuring 64-bit job services	29
Step Two: Finalizing the 64-bit job services setup	29
Setting up HP ALM legacy support (single-server)	30
Step One: Setting up the HP ALM legacy support connector	
Step Two: Configuring 32-bit job services for HP ALM legacy support	31
Step Three: Finalizing the HP ALM legacy support setup	31
Setting up services (distributed-server setup)	32
Step One: Configuring services	32
Configuring the 64-bit services	32
Setting up HP ALM legacy support	33
Step One: Setting up the HP ALM legacy support connector	33
Step Two: Configuring the 32-bit job services	34
Step Two: Testing the connection to the database	34
Step Three: Finalizing the job services setup	35

### Blueprint Upgrade Guide

#### **Overview**

This *Blueprint Upgrade Guide* is applicable if you have already installed Blueprint and you want to upgrade to a newer version. If you want to install Blueprint for the first time, please refer to the *Blueprint Installation Guide*. If you want to manually upgrade Blueprint instead, please refer to the *Blueprint Manual Upgrade Guide*.

#### **Important Notices**

#### Upgrade duration

The upgrade can take up to 60 minutes for large databases.

#### Backing up your data

It is strongly recommended that you backup your Blueprint data prior to starting the upgrade.

### System Requirements

Please refer to the *Blueprint Installation Guide* for detailed information about Blueprint System Requirements.

### Upgrade Steps

- Step 1: Back up your data
- Step 2: Run BlueprintSetup.exe on the web application server
- Step 3: Blueprint client setup

### Step 1: Back up your data

Warning: It is strongly recommended that you backup your database before starting the upgrade.

To back up your data before performing an upgrade:

1. Stop the Blueprint application pool and Blueprint web site.

**Note**: Your Blueprint application pool and Blueprint web site may have different names, depending on what you chose during installation.

- 2. Stop any installed components, including:
  - Job services
  - The HP ALM application pool and web site (formerly known as HP QC)

Note: This step only applies if any job services or the HP ALM web site have been installed.

- 3. Backup the following data:
  - Blueprint database
  - Blueprint website, including:
    - the web.config file
    - any custom dictionary files (dictionary.dct)
    - logging configurations (Logging.config file)
  - JobExecutorService folder. This includes the BluePrintSys.RC.JobExecutor.exe.config for each job service that has been installed.

### Step 2: Run BlueprintSetup.exe on the web application server

To complete this step:

Warning: The database upgrade can take up to 60 minutes for large databases.

1. Run **BlueprintSetup.exe** to extract all of the new application files and configuration utilities that are required for the Blueprint upgrade.

After you launch the **BlueprintSetup**.exe file, the wizard detects previous installations of Blueprint on your system and asks if you wish to continue upgrading Blueprint:

Blueprint Installation	×
Launching Blueprint upgrade wizard. Do you wish to continue?	
Yes No	

2. Click **Yes** to continue. If you click **No**, the upgrade wizard is canceled.

If HP ALM legacy support was not installed, the *Blueprint Upgrade Wizard* dialog gives you the option of enabling legacy support for versions 12 and earlier of HP ALM:

6	Blueprint Upgrade Wizard	d ×
Blueprint Upgrade Wiza Step 1/4: Specify your ap	rd oplication server settings.	blueprint
HP ALM Legacy Support HP ALM legacy support (versions prior to 12), connector as well as 3 ☑ Enable HP ALM leg Site Nam Port:	rt provides ability to export information By enabling this support Blueprint will in 2-bit windows service for processing the gacy support # (HPALMLegacyConnector 0081	to legacy HP ALM systems stall the HP ALM legacy se jobs.
Windows Services Accoun	t jsmith •••••••• Ins below do not work on distributed-ser	rver installations.
Local System     Local Service     Network Service		
NOTE: These credent	ials are required to access the database.	Next > Cancel

3. Enter your Windows Service Account credentials to continue and then click Next.

Next, the *Blueprint Upgrade Wizard* dialog appears and is pre-populated with the location and the name of your Blueprint Database:

ß	Blueprint Upgrade Wizar	d ×
Blueprint Up Step 2/4: Pro	grade Wizard vide Database Administrator credentials.	blueprint
The level	en afata Database Course	
Ine locati	on or the Database server	
The series	af the Detabase to be uppended	
Plusori	of the Database to be upgraded	
System Ac credential	Iministrator credentials are required to upgrade the s below.	database. Please specify the
Databa	see	
	me	
C actina		
Passwo	rd	
< Back		Next > Cancel

- 4. Enter the following information:
  - System Administrator Credentials: Choose whether you wish to authenticate using *Windows authentication* or *Database* authentication.

**Important**: This user must be a Database System Administrator (SA). This allows the installer to create the new database and grant permissions to the database so the web application server can access the database. The SA credentials are not stored anywhere in the system. The SA user account is only required for installation purposes and is not used during normal operation of the application. During normal operation of Blueprint, the Blueprint Server User account (example: acme\rrunner) is used to facilitate communication between the web application and database servers.

- Windows authentication: If you choose windows authentication, the wizard automatically uses the user that is currently logged in. You must ensure that the user has SA privileges on the database server.
- Database authentication: If you choose database authentication, you must specify the username and password of an account that has SA privileges on the database server.
- 5. The *Blueprint Application Configuration Wizard* dialog gives you the option of enabling phone home data collection:

ß	Blueprint Upgrade	Wizard ×
Blueprint Upgrade Wiza Step 2/3: Select phone h	r <b>d</b> ome options.	blueprint
l agree to allow the fol regular, scheduled bas	owing product-related Informat s to Blueprint.	tion to be automatically sent on a
Send Blueprint	Usage Information	
Data related to artifacts, featur	user interaction with the produce usage, etc.)	ict and content volume (e.g. numbers of
Send Blueprint	System Information	
Data related to	the technical environment withi	in which Blueprint is operating.
Note: This opti	on requires a user with members	ship in sysadmin fixed server role.
User Name Password	jsmith	
The above product-rel services, inform produ sensitive personal infor A list of the specific Us the Blueprint Installatic	tted information is being collect t decisions and strengthen our mation will be sent to Blueprint age and System information bei n Güide	ted to improve maintenance and support focus on customer satisfaction. No by selecting other of the above options. ing collected and sent can be found in
< Back		Next > Cancel

If you choose to enable phone home data collection, select the information you want to send to Blueprint and then click **Finish**:

- Send Blueprint Usage Information
- Send Blueprint System Information: If you select this option, you must specify the username and password of an account that has SA privileges on the database server.

For more information about phone home, see About allowing Blueprint to collect phone home data.

The following dialog is displayed after phone home data collection has been enabled:



6. Next, an upgrade summary appears:

Result 1	Message	
~ Fold	er Locations	
0	The temp folder is located at C:\Users\cmcnish\AppData\Local\Temp\	
0	Server log location: C:\ProgramData\Blueprint Software Systems\Logs\Blueprint\Blueprint	
0	Server admin audit log location: C:\ProgramData\Blueprint Software Systems\Logs\Blue	
0	Server performance log location: C:\ProgramData\Blueprint Software Systems\Logs\Blue	
0	Server performance trace log location: C:\ProgramData\Blueprint Software Systems\Log	
0	Web api audit log location: C:\ProgramData\Blueprint Software Systems\Logs\Blueprint	
0	Client log location: C:\ProgramData\Blueprint Software Systems\Logs\Blueprint\Blueprint	
0	Client performance log location: C:\ProgramData\Blueprint Software Systems\Logs\Blue	
∧ Pren	equisite Installs	
Ø	Windows Service Windows Process Activation Service is up and running!	
Ø	Windows Service World Wide Web Publishing Service is up and running!	
Ø	.NET 4.5 is installed	
Ø	IIS 7.0 or higher is installed	
. •	IIS Feature: Web Server is installed.	
If you cl installin	noose to continue, Blueprint will be upgraded by uninstalling the old version and the g the new version. Please do not cancel the upgrade while it is in progress.	

If any errors appear, you must resolve them before continuing with the upgrade.

**Tip:** Depending on the error that may appear, you may not need to close the upgrade dialog to resolve the error. You may be able to fulfill the system requirement in a separate system dialog and then click **Recheck Prerequisites** to perform another system check. The **Continue** button becomes available when the system prerequisites have been met.

Click **Continue** to proceed with the upgrade.

Once the prerequisites are met, the Close button becomes available on the dialog:

	Blueprint Upgrade Wizard	×	
Blueprin Step 2/2	<b>it Upgrade Wizard</b> 2: Upgrade Summary.	blueprint	
Result 1	7 Message	-	
0	Blueprint: Restoring web.config settings into folder 'C:\Progra	m Files (x86)\Blueprint Sof	
0	Restoring TFS settings into web.config		
0	Blueprint: Restoring logging.config settings into path 'C:\Prog	gram Files (x86)\Blueprint S	
0	Trying to get Blueprint Website returned: Blueprint		
0	Blueprint: Restoring website connection back into the web.co	nfig	
0	Blueprint: Starting application pool		
0	Finished ASP NET registering for site Blueprint		
0	HPALMLegacyConnector: Restoring web.config settings into folder 'C:\Program Files (x8		
0	Trying to get Blueprint Website returned: HPALMLegacyConnector		
0	HPALMLegacyConnector: Starting application pool		
0	Finished ASP NET registering for site HPALMLegacyConnecto	r i i i i i i i i i i i i i i i i i i i	
0	Restoring TFS settings into web.config		
0	Restoring TFS settings into web.config		
0	Restoring TFS settings into web.config	-	
0	Completed upgrade.	•	
•		•	

7. Click **Close** to launch the *Global Search Migration Utility*, and complete the upgrade.

**Warning:** The Global Search Migration Utility will be launched, and run in the background. Depending on the size of your database, the process could take several hours.

	Global Search Migration Utility 📃 🗕 🗖	x
2015-06-24 2015-06-24 nserted to 2015-06-24 2015-06-24	10:33:45,338 INFO: Populating Property Values: 100% completed. 10:33:45,339 INFO: Successfully converted 23612 property values and SearchableValue column 10:33:45,339 INFO: Loaded in chunks of 30000 Saved in chunks of 100 10:33:45,339 INFO: Took 2.728777 secs for migrating property values	
		~

### Step 3: Blueprint client setup

#### Configuring elevated trust in-browser

Blueprint must be configured to run with elevated trust in-browser before you can use some advanced features, such as:

- screen capture capabilities
- pasting images into diagrams
- Visio integration, such as importing and exporting diagrams
- rich text table integration with other applications

Elevated trust in-browser can be configured manually on each client machine, or the configurations can be pushed to Windows computers in a centralized manner.

### Using group policy to push the elevated trust in-browser configurations to Windows computers in a centralized manner

The recommended way to configure Blueprint to run with elevated trust in-browser is to use Group Policy. Group Policy allows IT Administrators to push configurations to Windows computers in a centralized manner.

For overview information about Group Policy, refer to Microsoft's Group Policy documentation at: http://technet.microsoft.com/en-us/windowsserver/bb310732.aspx.

To configure Blueprint to use elevated trust in-browser, your Group Policy configuration must do the following:

- 1. Set one of the following registry values:
  - On 32-bit computers: Set the HKEY\_LOCAL\_
     MACHINE\Software\Microsoft\Silverlight\AllowElevatedTrustAppsInBrow ser registry value to 0x00000001.
  - On 64-bit computers: Set the HKEY\_LOCAL\_

MACHINE\Software\Wow6432Node\Microsoft\Silverlight\AllowElevatedTru stAppsInBrowser registry value to 0x00000001.

To learn more about setting a registry value through Group Policy, please refer to the Microsoft documentation that explains how to configure a registry item at: http://technet.microsoft.com/en-us/library/cc753092.aspx.

- 2. Download the elevated trust in-browser package from the Blueprint Customer Portal.
- 3. Add the **publicBlueprintCertificate2017.cer** certificate to the Trusted Publishers Store.

To learn more about adding a certificate through Group Policy, please refer to the Microsoft documentation that explains how to deploy certificates by using group policy (http://technet.microsoft.com/en-us/library/cc770315(v=ws.10).aspx).

#### Manually configuring a computer to run with elevated trust in-browser

To configure Blueprint to run with elevated trust in-browser, perform the following steps on each client:

- 1. Download the elevated trust in-browser configuration files.
- 2. Unzip the package and note the directory where the files are located.
- 3. Run cmd.exe as Administrator.
  - 1. Click the Windows Start menu and type cmd.exe into the search bar.
  - 2. Right-click the **cmd.exe** program that appears under the Programs heading and then select **Run as administrator**:



3. When the confirmation dialog appears, click **Yes**.

The **cmd**.**exe** application launches with Administrator privileges:

4. Use the **cd** command to navigate to the folder where you unzipped the files.

For example:

cd c:\temp\elevated trust

- 5. Enter the following commands to allow elevated trust to run on your local machine:
  - For 64-bit operating systems:

regedit.exe /s AllowElevatedTrustAppsInBrowser64.reg

For 32-bit operating systems:

regedit.exe /s AllowElevatedTrustAppsInBrowser.reg

6. Run the following certutil command to apply the Blueprint public certificate:

```
certutil.exe -f -addstore "TrustedPublisher"
publicBlueprintCertificate2017.cer
```

Here is an example of the commands run on a 64-bit operating system:



7. Restart your web browser for the changes to take effect.

### Appendix

### About allowing Blueprint to collect phone home data

Blueprint collects system and usage data on a monthly basis to improve Blueprint features, services and customer satisfaction. Blueprint does not collect personal, private or classified information. The option to allow Blueprint to collect system and/or usage data is presented in the installer.

**Note:** Administrators can stop the collection of phone home data by editing the relevant value in the Blueprint web configuration file. For more information about stopping phone home, see *The Blueprint IT Administration Guide*.

### What data is collected?

When you enable *system* data collection, the following information is collected:

- SQL version
- SQL memory
- CPU count

When you enable *usage* data collection, the following information is collected:

- Log-in statistics
- Job execution statistics
- Project data statistics
- License usage
- Blueprint Analytics usage

### Configuration utility command reference

#### Тір

You can type the following commands to view more information about the command parameters:

blueprintwebcmd.exe /help

blueprintdbcmd.exe /help

blueprintqcwebcmd.exe /help

blueprintphonehomecmd.exe /help

#### Web Application Server Configuration Parameters

Parameter	Description	Default	Example
/object	Defines the object type of the command. This parameter can be set to one of the following values: SITE APPPOOL DBCONFIG		
/command	Defines the command to perform. This parameter can be set to one of the following values: <ul> <li>LIST</li> <li>ADD</li> <li>DELETE</li> <li>START</li> <li>STOP</li> </ul>		
/wsname	Defines the name of the site. This should be the same as the application pool name.	Blueprint	Blueprint
/wsid	Defines the ID of the site.		25
/port	Defines the port number used for the site.		8080
/dir	Defines the location of the Blueprint installation.		C:\Program Files (x86) \Blueprint Software Systems\Blueprint\Web
/apppoolname	Defines the name of the application pool. This should be the same as the site name.	Blueprint	Blueprint
/datasource	Defines your database and instance names.		DBSERVER\INSTANCE01
/catalog	Defines the name of the database.	Blueprint	
/integratedsec	Defines whether or not Windows security is used. This parameter can be set to one of the following values: TRUE FALSE If /integratedsec is set to FALSE, you must specify a /userid and /password.		
/userid	Defines the username of the Service Account/Application Pool user.		
/password	Defines the password of the Service Account/Application Pool user.		

#### **Database Server Configuration Parameters**

Parameter	Description	Default	Example
/object	Defines the object type of the command.		
	This parameter can be set to one of the following values:		
	<ul><li>SERVER</li><li>DB</li><li>USER</li></ul>		
/command	Defines the command to perform. This parameter can be set to one of the following values:		
	<ul> <li>LIST</li> <li>ADD</li> <li>INIT</li> <li>UPGRADE</li> </ul>		
/datasource	Defines your database and instance names.		DBSERVER\INSTANCE01
/catalog	Defines the name of the database.	Blueprint	BlueprintDB
/integratedsec	Defines whether or not Windows security is used. This parameter can be set to one of the following values:		
	<ul><li>TRUE</li><li>FALSE</li></ul>		
	If /integratedsec is set to FALSE, you must specify a /userid and /password.		
/userid	Defines the username of the <i>Database System</i> <i>Administrator</i> user. This parameter is only required if /integratedsec is set to FALSE.		
/password	Defines the password of the <i>Database System</i> <i>Administrator</i> user. This parameter is only required if /integratedsec is set to FALSE.		
/nuseridentity	Defines the username of the Blueprint Server User.		acme\rrunner

#### HP ALM Legacy Connector Configuration Parameters

Parameter	Description	Default	Example
/object	Defines the object type of the command. This parameter can be set to one of the following values: SITE APPPOOL DBCONFIG		

Parameter	Description	Default	Example
/command	Defines the command to perform. This parameter can be set to one of the following values: <ul> <li>LIST</li> <li>ADD</li> <li>DELETE</li> <li>START</li> <li>STOP</li> <li>SET</li> </ul>		
/wsname	Defines the name of the site. This should be the same as the application pool name.		HPALMLegacyConnector
/wsid	Defines the ID of the site.		25
/port	Defines the port number used for the site.		8081
/httpHostname	Defines the host name for the site.		
/dir	Defines the location of the connector installation.		C:\Program Files (x86)\Blueprint Software Systems\Blueprint\QcLiteWeb
/apppoolname	Defines the name of the application pool. This should be the same as the site name.		HPALMLegacyConnector
/userid	Defines the username of the Service Account/Application Pool user.		
/password	Defines the password of the Service Account/Application Pool user.		

#### Phone Home Configuration Parameters

Parameter	Description	Default	Example
/usageinfo	Defines whether usage information is being sent to Blueprint.		
	This parameter can be set to one of the following values:		
	<ul><li>TRUE</li><li>FALSE</li></ul>		
/systeminfo	Defines whether system information is being sent to Blueprint.		
	This parameter can be set to one of the following values:		
	TRUE		
	FALSE		
/wsname	Defines the name of your Blueprint web site.		
/userid	Defines the username of the Database System Administrator user.		
/password	Defines the password of the Database System Administrator user.		

### Maintaining the Blueprint database

For best performance, we recommend that you perform routine maintenance on the Blueprint database. For more information, log on to the Blueprint Customer Portal (http://portal.blueprintsys.com) and refer to *Knowledge Base Article 1046, How to perform routine maintenance on the Blueprint database*.

#### Setting up a new database

In certain cases, a new database may be need to be set up. For more information on setting up a new database, see the "Setting up a new database" section in the *IT Administration Guide*.

#### Setting up federated authentication

Refer to the Instance Administration Guide for more information.

To configure your identity provider for Blueprint federated authentication, ensure the following requirements are met:

The Entity ID must be set to:

<Blueprint URL>/Login/SAMLHandler.ashx

where <Blueprint\_URL> is your main Blueprint URL.

#### Example

For Blueprint cloud customers, the **Entity ID** will look something like this: https://acme.blueprintcloud.com/Login/SAMLHandler.ashx For Blueprint on-premise customers, the **Entity ID** will look something like this: https://blueprint.acme.com/Login/SAMLHandler.ashx

The **POST Endpoint** must be set to:

<Blueprint\_URL>/Login/SAMLHandler.ashx

where <Blueprint\_URL> is your main Blueprint URL.

A Username attribute must be included in the SAML response (that is, the token).

Blueprint reads the username from the **Username** attribute in the token (not the Subject). The name of this attribute must be **Username**. The username can be in the format you want, but must match the usernames as created in Blueprint. Valid options are regular usernames, Windows/AD account names (DOMAIN\user), e-mail addresses, Distinguished Names, or x509 Subjects.

The SAML response must contain the identity provider certificate (x509).

To enable Blueprint federated authentication:

- 1. Open the Instance Administration Console.
- 2. Click Federated Authentication.
- 3. Select the Enable Federated Authentication option.
- 4. Set your federated authentication settings:
  - Click **Replace** to upload your Identity Provider Certificate. The certificate must be in DER format.

**Important**: Certificates have an expiry date. Make sure you replace your certificate before it expires or users will be unable to access Blueprint.

Login URL: Defines your Identity Provider Login Service URL. This is the URL that Blueprint navigates to when the user clicks the Go button on the login screen. At this time, the Identity Provider returns a authentication token to Blueprint to authenticate the user.

Example: https://idp.domain.com/adfs/ls/

- Logout URL: Defines the URL to navigate to after a user clicks the Logout button in Blueprint. This behavior is not applicable if a user is logged in with fallback authentication.
- Error URL (optional): If a token error occurs, the user is redirected to the specified URL. The specific error is included as a GET parameter in the URL.

If an Error URL is not provided, Blueprint displays the token errors in the popup window.

Login Prompt (optional): Defines the login text that appears on the login screen when Federated Authentication is enabled:

blueprint				
Login with Corpor	ate Credentials Go			
	OR			
User Name:				
Password:				
	Login			
©2014 Blueprint So V	oftware Systems Inc. All rights reserved ersion: 6.1 (6.1.0.13)			

The default text is: Login with Corporate Credentials

5. Click Save.

### Setting up email notifications

Email settings are required in Blueprint if you want to take advantage of Blueprint notifications. Blueprint notifications provide your users with information and reminders at key moments. Notifications can help users stay up-to-date with project developments. There are two types of notifications you can enable: review notifications and email integrated discussions notifications. For more information about notifications, see the *Instance Administration Guide*.

### Setting up review notifications

Perform the following steps if you want to enable review notifications and configure the associated settings:

- 1. Open the Instance Administration Console.
- 2. Click Configure Instance > E-mail Settings on the ribbon (Instance Admin tab, Instance group).
- 3. Select the Enable Review Notifications check box to enable review notifications.
- 4. Enter your e-mail credentials in the *Email Credentials* section:
  - **E-mail Address**: Defines the e-mail address that will appear in the **From** address for all e-mail notifications.
  - **User Name**: Defines the user name of the e-mail account.
  - **Password**: Defines the password of the user.
- 5. Enter your outgoing mail server settings and preferences:
  - Server IP / Hostname: Defines the IP address or hostname of your SMTP server.
  - **Port**: Defines the port number of your SMTP server.
  - Enable SSL: Defines whether or not the SMTP server requires SSL.
  - Authenticated SMTP: Defines whether or not SMTP authentication is required. If authentication is required, select this option and enter a valid user name and password.
    - **User Name**: Defines the user name of a user with access to the SMTP server. This user name can be different from the user name provided in the *Email Credentials* section.

**Note**: The SMTP user name is sometimes, but not always, the e-mail address of the user. The format of the user name is dependent on the server configuration.

- **Password**: Defines the password of the user.
- 6. Click Save.

Tip: You can click the Send Test E-mail button to verify that e-mails can be sent successfully.

#### Setting up e-mail integrated discussions

Perform the following steps to enable and configure e-mail integrated discussion settings:

- 1. Open the Instance Administration Console.
- 2. Click Configure Instance > E-mail Settings on the ribbon (Instance Admin tab, Instance group).
- 3. Select the **Allow projects to enable discussions via E-mail** check box to enable e-mail-integrated discussions.

**Note:** By default, e-mail integrated discussions are set to only allow users to mention Blueprint registered users.

To change this setting: click **Edit Settings**. Next, click **All users** to allow any user outside of Blueprint to contribute via e-mail to discussions.

To restrict this setting to a subset of e-mail domains: ensure **Specify domains** is enabled, enter the domains you want to allow in e-mail integrated discussions and click **OK**.

- 4. Enter your e-mail credentials in the *Email Credentials* section:
  - **E-mail Address**: Defines the e-mail address that will appear in the **From** address for all e-mail notifications.
  - User Name: Defines the user name of the e-mail account.
  - **Password**: Defines the password of the user.
- 5. Enter your incoming mail server settings and preferences:
  - **IMAP/POP**: Defines the protocol of the incoming email server.
  - **Server IP/Hostname**: Defines the IP address or hostname of your IMAP/POP server.
  - **Port**: Defines the port number of your IMAP/POP server.
  - Enable SSL: Defines whether or not the IMAP/POP server requires SSL.

**Tip**: You can click the **Test Connection** button to verify that e-mail integrated discussions can be delivered successfully.

- 6. Enter your outgoing mail server settings and preferences:
  - Server IP / Hostname: Defines the IP address or hostname of your SMTP server.
  - **Port**: Defines the port number of your SMTP server.
  - Enable SSL: Defines whether or not the SMTP server requires SSL.
  - Authenticated SMTP: Defines whether or not SMTP authentication is required. If authentication is required, select this option and enter a valid user name and password.
    - User Name: Defines the user name of a user with access to the SMTP server. This user name can be different from the user name provided in the *Email Credentials* section.

**Note**: The SMTP user name is sometimes, but not always, the e-mail address of the user. The format of the user name is dependent on the server configuration.

- **Password**: Defines the password of the user.
- 7. Click Save.

Next, enable the e-mail integrated discussions setting within Project Settings (Project Administration).

### Adding users to Blueprint

Refer to the Instance Administration Guide for more information.

### **Adding all Active Directory users**

Complete the following steps to add all Active Directory users to Blueprint:

Important: You can only add Windows users if Active Directory integration is enabled.

- 1. Click Manage Users And Groups > Users on the ribbon (Instance Admin tab, Instance group).
- 2. Click New > New Windows User on the ribbon (Instance Admin tab, Manage Items group).
- 3. Click the **Find** button to display all Active Directory users.

**Note**: If Active Directory integration is enabled, the Location is automatically populated so you can access the Active Directory.

4. Type Ctrl-a to select all users and then click OK.

### Adding a database user in Blueprint

Complete the following steps to add a single database user to Blueprint:

- 1. On the Users tab, click **New > New Database User** on the ribbon (Instance Admin tab, Manage Items group).
- 2. Enter the user information on the right side of the window.
- 3. Click Save.

#### Creating license groups

Refer to the Instance Administration Guide for more information.

A license group is an instance-level group that allows you to control the type of license that a user consumes while logged into Blueprint. A user's effective access in Blueprint is the intersection of their project role assignment and their license.

**Important**: Users must be added to an *Author* or *Collaborate* license group before they can take advantage of most Blueprint features. Users that are not added to an *Author* or *Collaborate* license group are limited to accessing Blueprint artifacts by URL.

Complete the following steps to create an All Authors group that is designated as an Author license group:

- 1. Click Manage Users And Groups > Groups on the ribbon (Instance Admin tab, Instance group).
- 2. Click New > Database Group on the ribbon (Instance Admin tab, Manage Items group).
- 3. Enter the group information:
  - Name: Set this field to All Authors.
  - Description: Specify a description for the group.
  - **Email**: Specify an email address for the group.

- **Scope**: This field must be left blank. License groups cannot have an associated Scope.
- License Group?: Enable this option so the group is a license group.
- License Type: Change this option to Author.
- 4. Click the Add button to add members to the group. Type Ctrl-a to select all users, and then click OK.
- 5. Click Save.

Repeat the steps above to create an **All Contributors** group, but set the **License Type** to **Collaborate**.

### Creating projects

Refer to the Instance Administration Guide for more information.

Complete the following steps to create the Getting Started project.

**Note**: The purpose of the Getting Started project is to provide a location for users to experiment with Blueprint features and complete the tutorials in the Getting Started Guide.

- 1. Click the **Projects** button on the ribbon.
- 2. Right-click the *Blueprint* item on the left side of the window and select **New Folder**.
- 3. Specify the following folder information:
  - Name: Getting Started
  - **Description**: Folder containing getting started project(s).
- 4. Click Save.
- 5. Expand the *Blueprint* item on the left side of the window, right-click **Getting Started**, and select **New Project**.
- 6. Specify the project information:
  - Name: Getting Started
  - Description: Project for users to learn Blueprint using the Blueprint Getting Started Guide.
  - Location: This should be set to /Blueprint/Getting Started/
  - Select Source: Empty Project
- 7. Click Save.
- 8. Click the **Launch Project Administration** button. This button is located in the lower-right area of the window. The *Project Administration Console* is displayed.

#### Granting access to projects

Refer to the Project Administration Guide for more information.

**Note**: A user's effective access in Blueprint is the intersection of their project role assignment and their license.

Complete the following steps to configure the **Getting Started** project so the **All Authors** group can modify the project.

- 1. Create an Authors role.
  - 1. In the *Project Admin Console*, click **Manage Access** > **Project Roles** on the ribbon (*Project Admin* tab, *Project* group)
  - 2. Click the New button on the ribbon (*Project Admin* tab, Actions group).
  - 3. Specify the role information:
    - Name: Authors
    - Description: This role has read, edit, trace, and comment privileges.
    - Privileges: Place a checkmark beside Read, Edit, Trace, and Comment.
  - 4. Click Save.
- 2. Assign the Authors role to the All Authors group for the Getting Started project.
  - In the Project Admin Console, click Manage Access > Project Role Assignments on the ribbon (Project Admin tab, Project group)
  - 2. Click the **New** button on the ribbon (*Project Admin* tab, *Actions* group) and then click the *Groups* tab after the dialog appears.
  - 3. Select the **All Authors** group and click **OK**.
  - 4. Specify the project role assignment information:
    - Identity: Group : All Authors
    - Role: Authors
    - Scope: Project
  - 5. Click Save.

### Web.config reference

**Note:** Before upgrading Blueprint, we recommend backing up the **web.config** file. None of your existing customizations are preserved during the upgrade process. The backup file can be used as a reference to make changes to the new version of **web.config** after upgrading.

The **web.config** file contains many Blueprint web application settings, most of which should not be edited in common configuration scenarios. The following table identifies Blueprint settings that are commonly configured as well as their possible values:

Section	Parameter name	Default value	Description
<system.web> <authentication> <forms></forms></authentication></system.web>	loginUrl	Login/ WinLogin.as px	The default value ( Login/WinLogin.aspx) causes a Windows log-in dialog to appear after Blueprint is opened. You have the option of removing the Windows dialog by changing this value. <b>Caution:</b> If the value is changed to weblogin.aspx, users will no longer be able to log on using LDAP credentials. Only Blueprint database users will be permitted to log on. <b>Tip:</b> If you change the loginUrl value, you can test the results by opening Blueprint in a browser.
<appsettings> <add key="LdapGetTimeout"></add></appsettings>	value	300	Indicates how many seconds it takes for LDAP retrieval to time out. By default, the LDAP retrieval timeout is 300 seconds (recommended). The value can be changed. The minimum value it can be changed to is 30 and the maximum is 600.

Section	Parameter name	Default value	Description
<appsettings> <add key="UseLegacyDomainName"></add></appsettings>	value	false	The UseLegacyDomainName key indicates the domain name section. You can use the original parsing algorithm to determine the domain name. There is no need to change the default value in most circumstances. However, if you have problems integrating Blueprint with LDAP, you may need to change the value to TRUE. Please contact Blueprint Support before changing this value.
<appsettings> <add key="AttachmentsFolderPath"></add></appsettings>	value	None	The default value is empty. When Blueprint users save attachments to their system, the attachments get saved to their IIS Application Pool Temp folder by default. To store the attachment in another location, replace the empty value with the desired path.
<appsettings> <add key="UserSessionExpiration&lt;br&gt;TimeoutInMinutes"></add></appsettings>	value	30	This section defines when the session times out from inactivity and, as a result, the user is logged off of Blueprint. The value is measured in minutes. The default session timeout is 30 minutes. The recommended value is 20. The minimum value it can be changed to is 10 and the maximum is 60.

Section	Parameter name	Default value	Description
appSettings> <add key="QCMaxRetries"></add>	value	30	This section defines the maximum number of connection re-attempts that will be made when connection to HP Quality Center initially fails. By default, the value is 30 (recommended). To change the value, the following tag must be manually added to the <connectionstrings> section first: <add key="QCMaxRetries"</add </connectionstrings>
			value=""> The minimum value it can be changed to is 3 and the maximum is 60.
<appsettings> <add key="QCDelayInSeconds"></add></appsettings>	value	30	This section defines the delay between connection re-attempts that will be made when connection to HP Quality Center initially fails. The delay is measured in seconds. To change the value, the following tag must be manually added to the <connectionstrings> section first: <add key="QCDelayInSecon ds" value=""&gt; The recommended value is 5. The minimum value it can be changed to is 5 and the maximum is 60.</add </connectionstrings>

Section	Parameter name	Default value	Description
<appsettings> <add key="ExcelImportArtifactLimit"&gt;</add </appsettings>	value	500	This section defines the amount of artifacts that a user can import from Microsoft Excel at a time. <b>Note:</b> We do not recommend changing this value unless it is necessary.
<appsettings> <add key="ConnectionCheckInterval"></add></appsettings>	value	2	This section defines the amount of minutes after which Silverlight checks if the user session on the server is expired. This interval triggers session renewal. Important: The ConnectionCheckInte rval value should always be less than the sessionState value (timeout).
<appsettings> <add key="EnablePhoneHome"></add></appsettings>	value	false	Indicates whether the phone home service performing data collection is enabled. Important: If you are enabling the phone home service, the proceeding collection parameter must also be set to TRUE for phone home to operate.
<appsettings> <add key="PhoneHomeAllowToCollectSysInfo"&gt;</add </appsettings>	value	false	Indicates whether you are allowing Blueprint to collect usage and system data for the phone home service. Important: If you are enabling phone home data collection, the preceding service parameter must also be set to TRUE for phone home to operate.

Section	Parameter name	Default value	Description
<connectionstrings> <add connectionstring=""></add></connectionstrings>	data source	None	You can use this section to point the Blueprint instance to a different database instance.
<connectionstrings> <add connectionstring=""></add></connectionstrings>	initial catalog	None	Indicates the name of the Blueprint database.
<pre><aute connectionstring=""> <appsettings> </appsettings></aute></pre>	FullTextSearchQueryMe thod	0	If you are experiencing search performance issues, Global Search is configurable between three values, 0, 1, and 2. 0=Normal query method which sorts the data based on the last modified date time. The most recent modified artifacts will be returned. 1=The search occurs without taking into consideration any current property type associations. For example, if the user had two properties "Risk" and "Story Points" associated with Requirement type "User Story", and then removed the association with "Risk", the search hit would still return the results as if "Risk" was still associated. The artifacts are sorted over their created date time (and not their modified date time). 2=The search looks for hits only across Name, Description and Label property values. The items are sorted over their created date time.

### Installing services manually

**Note:** Only Blueprint database users can manually install services. For more information about how to add a database user, see Adding users to Blueprint.

The following services are available to install if needed:

Job services (recommended)

This functionality is necessary to perform the following jobs in Blueprint: document generation, exporting artifacts to ALM systems and test generation.

Legacy support for HP ALM versions 12 and earlier (optional)

If you require support for HP ALM version 12 or earlier, setup of this component is necessary.

Note: HP ALM support is only available for COM library. It is not available for the REST API.

To install services:

- Continue to the single-server section to host job services and the Blueprint database on the same server.
- Continue to the <u>distributed-server section</u> to host job services and the Blueprint database on separate servers.

### Adding a database user (command line)

You can add any of the following database user types using the /nuseridentity parameter:

- Local Service: LocalService
- Local System: LocalSystem
- Network Service: NetworkService
- A Windows services account. Example: **blueprint\jsmith**.

Add a database user:

```
blueprintdbcmd.exe /object USER /command ADD /datasource
[DBSERVER\INSTANCE01] /catalog [BlueprintDB] /integratedsec FALSE /userid
[dbadmin] /password [pAssw0rd] /nuseridentity LocalService
```

### Setting up services (single-server setup)

You can set up one or both of the following:

- 64-bit job services
- HP ALM legacy support

#### Setting up 64-bit job services (single-server)

Installing 64-bit job services involves completing the following steps:

- Step One: Configuring 64-bit job services
- Step Two: Finalizing the 64-bit job services setup

#### Step One: Configuring 64-bit job services

- 1. Open the following configuration file in a text editor: BluePrintSys.RC.JobExecutor.exe.config
- 2. Make sure that the value in the <add key="Service.Jobs"> tag is as follows:

```
<add key="Service.Jobs" value="
DocGen,TfsExport,HpAlmRestExport,TfsChangeSummary,HpAlmRestChangeSumma
ry,TfsExportTests,HpAlmRestExportTests" />
```

3. Make sure the <add key="Service.Name"> tag specifies the 64-bit job service as follows:

<add key="Service.Name" value="Blueprint Job Service (64 bit)" />

Note: If you are setting up the second 64-bit job service in this step, specify the Service.Name value as Blueprint Job Service 2 (64 bit) instead of the value listed above.

4. Replace the following connectionString value with the Blueprint database connection string:

```
<connectionStrings>
<add name="InstanceContainer" connectionString="
metadata=res://*/Models.Instance.csdl|res://*/Models.Instance.ssdl|res
://*/Models.Instance.msl;provider=System.Data.SqlClient;provider
connection string="Data Source=.\MSSQLSERVER;Initial
Catalog=Blueprint;Integrated
Security=True;Pooling=True;MultipleActiveResultSets=True""
providerName="System.Data.EntityClient" />
</connectionStrings>
```

**Note:** Data Source must specify the SQL instance name and the Blueprint instance name. If your SQL instance has a name that is different from **MSSQLSERVER** and/or your Blueprint instance is not named **Blueprint**, you need to change the value(s).

#### Step Two: Finalizing the 64-bit job services setup

1. Install both 64-bit job services by running the following command with your user name and password:

```
BluePrintSys.RC.JobExecutor.exe -c Install -a User -u [USERNAME] -p [PASSWORD]
```

**Note:** To install the service using the default Windows account, run the following command instead:

BluePrintSys.RC.JobExecutor.exe -c Install -a LocalService

2. Start the 64-bit job services with the following command:

BluePrintSys.RC.JobExecutor.exe -c Start

You have successfully deployed the 64-bit job services.

Important: Repeat steps one and two to configure the second 64-bit job service.

Setting up HP ALM legacy support (single-server)

Installing HP ALM legacy support involves completing the following steps:

- Step One: Setting up the HP ALM legacy support connector
- Step Two: Configuring 32-bit job services for HP ALM legacy support
- Step Three: Finalizing the HP ALM legacy support setup

#### Step One: Setting up the HP ALM legacy support connector

1. Set up the HP ALM application pool by running the following command:

```
blueprintqcwebcmd.exe /object AppPool /command ADD /apppoolname
HPQCLegacyConnector
```

2. Set up the HP ALM web site by running the following command (where the number after /port is QcLiteWeb's port number):

```
blueprintqcwebcmd.exe /object Site /command ADD /wsname
HPQCLegacyConnector /dir "C:\Program Files (x86)\Blueprint Software
Systems\Blueprint\QcLiteWeb" /port [8081] /apppoolname
HPQCLegacyConnector
```

3. Start the HP ALM application pool by running the following command:

```
blueprintqcwebcmd.exe /object AppPool /command START /apppoolname
HPQCLegacyConnector
```

4. Start the HP ALM web site by running the following command:

```
blueprintqcwebcmd.exe /object SITE /command START /wsname
HPQCLegacyConnector
```

5. Set the HP ALM key for Blueprint with the following command (where the number after /port is QcLiteWeb's port number):

```
blueprintqcwebcmd.exe /object Config /command SET /dir "C:\Program
Files (x86)\Blueprint Software Systems\Blueprint\Web" /port [8081]
```

You have successfully set up the HP ALM legacy support connector.

#### Step Two: Configuring 32-bit job services for HP ALM legacy support

- 1. Open the following configuration file in a text editor: BluePrintSys.RC.JobExecutor32.exe.config
- 2. Make sure that the value within <add key="Service.Jobs"> is as follows:

```
<add key="Service.Jobs" value="QcExport,QcChangeSummary,QcExportTests" />
```

3. Make sure the <add key="Service.Name"> tag includes the Blueprint HP ALM legacy job service as follows:

```
<add key="Service.Name" value="Blueprint HP QC Legacy Job Service (32 bit)" />
```

4. Replace the following connectionString value with the Blueprint database connection string:

```
<connectionStrings>
<add name="InstanceContainer" connectionString="
metadata=res://*/Models.Instance.csdl|res://*/Models.Instance.ssdl|res
://*/Models.Instance.msl;provider=System.Data.SqlClient;provider
connection string="Data Source=.\MSSQLSERVER;Initial
Catalog=Blueprint;Integrated
Security=True;Pooling=True;MultipleActiveResultSets=True""
providerName="System.Data.EntityClient" />
</connectionStrings>
```

**Note:** Data Source must specify the SQL instance name and the Blueprint instance name. If your SQL instance has a name that is different from **MSSQLSERVER** and/or your Blueprint instance is not named **Blueprint**, you need to change the value(s).

#### Step Three: Finalizing the HP ALM legacy support setup

1. Install the 32-bit service by running the following command with your user name and password:

```
BluePrintSys.RC.JobExecutor32.exe -c Install -a User -u [USERNAME] -p [PASSWORD]
```

**Note:** To install the service using the default Windows account, run the following command instead:

```
BluePrintSys.RC.JobExecutor32.exe -c Install -a LocalService
```

2. Next, start the 32-bit job executor Windows service with the following command:

BluePrintSys.RC.JobExecutor32.exe -c Start

You have successfully set up legacy support for HP ALM.

### Setting up services (distributed-server setup)

Setting up services on a separate machine (distributed-server) involves these steps:

- Step One: Configuring services
- Step Two: Testing the connection to the database
- Step Three: Finalizing the job services setup

#### Step One: Configuring services

You have the option of setting up the following services:

- 64-bit job services
- HP Quality Center legacy support

#### Configuring the 64-bit services

**Note:** In certain cases, the job services folder and files mentioned in the instructions below are located in the C:\**Program Files** directory instead of the C:\**Program Files** (x86) directory.

- 1. Open the following configuration file in a text editor: BluePrintSys.RC.JobExecutor.exe.config
- 2. Make sure that the value in the <add key="Service.Jobs"> tag is as follows:

```
<add key="Service.Jobs" value="
DocGen,TfsExport,HpAlmRestExport,TfsChangeSummary,HpAlmRestChangeSumma
ry,TfsExportTests,HpAlmRestExportTests" />
```

3. Make sure the <add key="Service.Name"> tag specifies the 64-bit job service as follows:

<add key="Service.Name" value="Blueprint Job Service (64 bit)" />

Note: If you are setting up the second 64-bit job service in this step, specify the Service.Name value as Blueprint Job Service 2 (64 bit) instead of the value listed above.

4. Replace the following connectionString value with the Blueprint database connection string:

```
<connectionStrings>
<add name="InstanceContainer" connectionString="
metadata=res://*/Models.Instance.csdl|res://*/Models.Instance.ssdl|res
://*/Models.Instance.msl;provider=System.Data.SqlClient;provider
connection string=&quot;Data Source=.\MSSQLSERVER;Initial
Catalog=Blueprint;Integrated
Security=True;Pooling=True;MultipleActiveResultSets=True&quot;"
providerName="System.Data.EntityClient" />
</connectionStrings>
```

**Note:** Data Source must specify the SQL instance name and the Blueprint instance name. If your SQL instance has a name that is different from **MSSQLSERVER** and/or your Blueprint instance is not named **Blueprint**, you need to change the value(s).

Important: Repeat all of the steps above to configure the second 64-bit job service.

#### Setting up HP ALM legacy support

Setting up legacy support for HP ALM involves the following steps:

- Step One: Setting up the HP ALM legacy support connector
- Step Two: Configuring the 32-bit job services

STEP ONE: SETTING UP THE HP ALM LEGACY SUPPORT CONNECTOR

1. Set up the HP ALM application pool by running the following command:

```
blueprintqcwebcmd.exe /object AppPool /command ADD /apppoolname
HPQCLegacyConnector
```

2. Set up the HP ALM web site by running the following command (where the number after /port is QcLiteWeb's port number):

```
blueprintqcwebcmd.exe /object Site /command ADD /wsname
HPQCLegacyConnector /dir "C:\Program Files (x86)\Blueprint Software
Systems\Blueprint\QcLiteWeb" /port [8081] /apppoolname
HPQCLegacyConnector
```

3. Start the HP ALM application pool by running the following command:

```
blueprintqcwebcmd.exe /object AppPool /command START /apppoolname
HPQCLegacyConnector
```

4. Start the HP ALM web site by running the following command:

```
blueprintqcwebcmd.exe /object SITE /command START /wsname
HPQCLegacyConnector
```

5. Set the HP ALM key for Blueprint with the following command (where the number after /port is QcLiteWeb's port number):

```
blueprintqcwebcmd.exe /object Config /command SET /dir "C:\Program
Files (x86)\Blueprint Software Systems\Blueprint\Web" /port [8081]
```

You have successfully set up the HP ALM legacy support connector.



STEP TWO: CONFIGURING THE 32-BIT JOB SERVICES

**Note:** In certain cases, the job services folder and files mentioned in the instructions below are located in the C:\**Program Files** directory instead of the C:\**Program Files** (**x86**) directory.

Complete the following instructions, pasting the copied files onto your target machine:

- 1. Open the following configuration file in a text editor: BluePrintSys.RC.JobExecutor32.exe.config
- 2. Make sure that the value within <add key="Service.Jobs"> is as follows:

<add key="Service.Jobs" value="QcExport,QcChangeSummary,QcExportTests" />

3. Make sure the <add key="Service.Name"> tag includes the Blueprint HP ALM legacy job service as follows:

```
<add key="Service.Name" value="Blueprint HP QC Legacy Job Service (32 bit)" />
```

4. Replace the following connectionString value with the Blueprint database connection string:

```
<connectionStrings>
<add name="InstanceContainer" connectionString="
metadata=res://*/Models.Instance.csdl|res://*/Models.Instance.ssdl|res
://*/Models.Instance.msl;provider=System.Data.SqlClient;provider
connection string="Data Source=.\MSSQLSERVER;Initial
Catalog=Blueprint;Integrated
Security=True;Pooling=True;MultipleActiveResultSets=True""
providerName="System.Data.EntityClient" />
</connectionStrings>
```

**Note:** Data Source must specify the SQL instance name and the Blueprint instance name. If your SQL instance has a name that is different from **MSSQLSERVER** and/or your Blueprint instance is not named **Blueprint**, you need to change the value(s).

#### Step Two: Testing the connection to the database

**Note:** This step must be performed for each job service you intend to set up.

This testing procedure must validate the configuration of the following values:

- The Service.Name value is unique and no other job service has this name on the current machine
- The connectionString value is valid and the job service can connect to Blueprint database.

If the test is not successful, you must specify the correct value(s) in the job service configuration file and re-attempt the test.

To test the job services connection to the Blueprint database:

Run the following command (where [JobServiceExecutableFile] is the name of the job service executable file):

[JobServiceExecutableFile] -c test

**Note:** The 32-bit job services file name is typically **BluePrintSys.RC.JobExecutor32.exe** and the 64-bit job services file name is typically **BluePrintSys.RC.JobExecutor.exe**.

#### Step Three: Finalizing the job services setup

**Note:** This step must be performed for each job service you intend to set up.

This is the final step in setting up job services on a separate machine from the Blueprint database.

To finalize the setup:

1. Install the job service by running the following command (where [JobServiceExecutableFile] is the name of the job service executable file):

[JobServiceExecutableFile] -c install

2. Start the job service by running the following command (where [JobServiceExecutableFile] is the name of the job service executable file):

[JobServiceExecutableFile] -c start

You have deployed job services.

To verify whether job services have been successfully installed and configured:

- 1. Log on to Blueprint.
- 2. Open the Instance Administration Console from the Menu

The Instance Administration Console appears.

3. Click Job Services.

The Job Services screen appears.

Any job services that have been successfully installed and configured appear in the *Job Services* list. Information about the configured service name and supported jobs also is available in the list.