

Blueprint 6.3 Installation Guide

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### Overview

This *Blueprint Installation Guide* walks you through the Blueprint installation process. Please refer to the *Blueprint Upgrade Guide* if Blueprint is already installed and you want to upgrade to a newer version.

Before you begin installing Blueprint:

- Ensure that you have your Blueprint activation key. If you don't have an activation key, please submit a case to Blueprint Support using the customer portal at http://portal.blueprintsys.com/
- Ensure that your environment meets the minimum system requirements.

### System requirements

### Web application server and database server requirements

The web application server must have access to communicate with the database server. Refer to the <u>User</u> requirements section for more information.

The following table outlines the minimum hardware and software requirements for both the distributed-server and single-server configurations in a 1000 user deployment. For more than 1000 users, please see the Large Scale Deployment Guide

	Web application server (distributed-server configuration) 1 Web Server	Database server (distributed-server configuration) 1 Database Server	Web application server and database server (single-server configuration) 1 Server
Hardware requirements (1000 user deployment)	<ul> <li>2.5 GHz or faster</li> <li>8 64 bit CPU cores</li> <li>16 GB RAM</li> <li>500 GB HDD</li> </ul>	<ul> <li>2.5 GHz or faster</li> <li>8 64 bit CPU cores</li> <li>16 GB RAM minimum</li> <li>Shared 1 TB SAN</li> </ul>	<ul> <li>2.5 GHz or faster</li> <li>8 64 bit CPU cores</li> <li>16 GB RAM</li> <li>Shared 1 TB SAN</li> </ul>
Software requirements	<ul> <li>One of:</li> <li>Windows Server 2012 with IIS 8.x</li> <li>Windows Server 2012 R2 with IIS 8.x</li> <li>.NET Framework 4.5</li> </ul>	<ul> <li>One of:</li> <li>Windows Server 2012 (standard edition or enterprise)</li> <li>Windows Server 2012 R2 (standard edition or enterprise)</li> <li>SQL Server 2014</li> <li>SQL Server 2012</li> </ul>	<ul> <li>One of:</li> <li>Windows Server 2012 with IIS 8.x</li> <li>Windows Server 2012 R2 with IIS 8.x</li> <li>SQL Server 2014</li> <li>SQL Server 2012</li> <li>.NET Framework 4.5</li> </ul>

### **Requirements for ALM integrations**

There are additional requirements for environments licensed to integrate bi-directionally with ALM systems. This functionality is separate from native integrations and is facilitated by an Integration partner.

The following requirements should be met for environments licensed to integrate:

	ALM integrations server (1 Integration Server)
Hardware requirements (1000 user deployment)	<ul> <li>2.5 GHz or faster</li> <li>2 64 bit CPU cores</li> <li>6 GB RAM minimum</li> <li>50 GB HDD space minimum</li> </ul>

**Note:** If you are hosting the ALM integrations server on the same server as the web application or database, simply add the specifications above to the applicable server specifications outlined in Web application server and database server requirements.

### Web server configuration requirements

### **IIS server configuration requirements**

#### Windows Server 2012

There are a number of Roles, Features and Role Services that must be enabled in the IIS Add Roles and Features Wizard before you can use Blueprint.

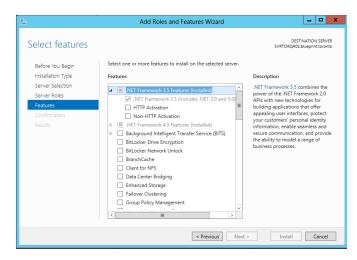
#### Server roles

Ъ.	Add Roles and Features Wizard	_ <b>D</b> X
Select server roles	5	DESTINATION SERVER TORWEBDWV006.blueprint.toronto
Before You Begin	Select one or more roles to install on the selected server.	
Installation Type	Roles	Description
Server Selection Server Roles Peatures Web Server Role (IIS) Role Services Confirmation Results	Application Server     DHCP Server     DHCP Server     Server     Sav Server     Sav Server     More and Storage Services (1 of 12 installed)     Hyper-V     Network Policy and Access Services     Print and Document Services     Remote Access     Remote Access     Remote Access     Volume Activation Services     Vindows Deployment Services     Windows Server Expendials Experience     Windows Server Update Services     Vindows Server Update Services	Web Server (IIS) provides a reliable, manageable, and scalable Web application infrastructure.
	< Previous Next	> Install Cancel

Within *Server Manager > Manage > Add Roles and Features*, the following Role must be enabled for Windows Server 2012:

Web Server (IIS)

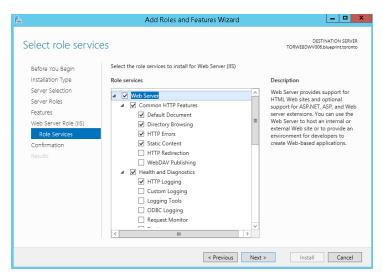
#### **Features**



The following Features must be enabled for Windows Server 2012:

- .NET Framework 3.5 Features
  - .NET Framework 3.5
  - HTTP Activation
  - Non-HTTP Activation
- .NET Framework 4.5 Features
  - .NET Framework 4.5
  - ASP.NET 4.5
  - WCF Services
    - HTTP Activation
- Windows Process Activation Service
  - Process Model
  - .NET Environment 3.5
  - Configuration APIs

#### **Role services**



The following Role Services must be enabled for Windows Server 2012:

- Web Server
  - Common HTTP Features
    - Default Document
    - Directory Browsing
    - HTTP Errors
    - Static Content
    - HTTP Redirection
  - Health and Diagnostics
    - HTTP Logging
    - Request Monitor
  - Performance
    - Static Content Compression
    - Dynamic Content Compression
  - Security
    - Request Filtering
    - Basic Authentication
    - Digest Authentication
    - IP and Domain Restrictions
    - Windows Authentication
  - Application Development
    - .NET Extensibility 3.5
    - .NET Extensibility 4.5
    - ASP
    - ASP .NET 3.5
    - ASP .NET 4.5
    - ISAPI Extensions
    - ISAPI Filters



- Management Tools
  - IIS Management Console
  - IIS Management Scripts and Tools

**Note: World Wide Web Publishing Service** must also be started within *Services* (Control Panel > Administrative Tools).

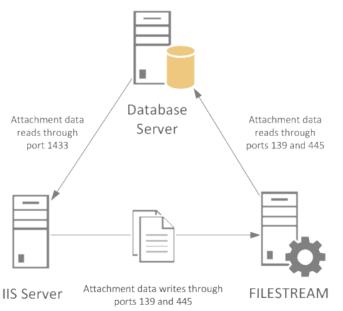
### Database server configuration requirements

To complete database server configuration, perform the following steps:

- Open ports 139, 445 and 1433 in Firewall
- Enabling FILESTREAM
- Verifying FILESTREAM is enabled

### **FILESTREAM**

FILESTREAM must be enabled in order to use Blueprint. The following diagram shows how the IIS server and the database server communicate with FILESTREAM:



#### Enabling FILESTREAM

To enable FILESTREAM, perform the following steps:

#### Important

Ports 139 and 445 must be open between the Blueprint Application Server and the Database Server.

- 1. In SQL Server Configuration Management, select SQL Server Services.
- 2. Select your SQL server and select **Properties** from context menu.
- 3. Select the FILESTREAM tab:

SQL Server (SQL2008) Properties	x	
Log On Service FILESTREAM Advanced		
Enable FILESTREAM for Transact-SQL access		
✓ Enable FILESTREAM for file I/O streaming access		
Windows share name: SQL2008	-	
Allow remote clients to have streaming access to FILESTREAM data		
OK Cancel Apply H	lelp	

- 4. Enable the following options:
  - Enable FILESTREAM for Transact-SQL access
  - Enable FILESTREAM for file I/O streaming access
  - Allow remote clients to have streaming access to FILESTREAM data

**Note**: This option is only required if you install Blueprint in a distributed manner (separate Web Application server and Database server).

5. Click **OK**.

Next, verify that FILESTREAM is enabled.

Verifying FILESTREAM is enabled

To verify FILESTREAM is enabled, perform the following steps:

- 1. Open SQL Server Management Studio.
- 2. To verify whether FILESTREAM has been enabled, run the following SELECT statement:

```
SELECT
SERVERPROPERTY ('FilestreamConfiguredLevel'),
SERVERPROPERTY ('FilestreamEffectiveLevel'),
SERVERPROPERTY ('FilestreamShareName');
```

If FILESTREAM has been successfully enabled, the following output appears:

💷 Results 📴 Messages			
(No column name) (No column name) (No column name)			
1	3	3	IN01

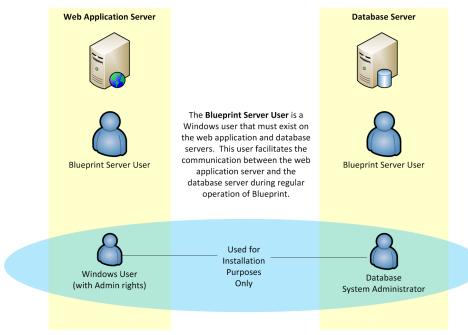
If the first or second number is "0", FILESTREAM is not enabled on the server and the following SQL statement must be run:

```
EXEC sp_configure filestream_access_level, 3 RECONFIGURE
```

To verify FILESTREAM has been successfully configured, re-run the SELECT statement.

### **User requirements**

The following diagram illustrates the Blueprint installation user requirements:



### **Blueprint Server User**

The Blueprint Server User is a service account for the application pool connection from IIS to the database.

#### Note: The Blueprint Server User is required for everyday Blueprint operation.

The following requirements must be met:

- This user account must be defined as a corporate *domain* user (that is, domain\_name\username) or a local server account (that is, ApplicationPoolIdentity).
- This user account must exist on *both* the web application server and the database server.
- This user account can have standard user privileges and does not need to be an administrator. To enable Blueprint server logging, the Blueprint Server User must have modify+read+write permissions on the Blueprint program data folder (example: C:\ProgramData\Blueprint Software Systems). You can grant these permissions by including the Blueprint Server User in a group that already has access to the folder, or by granting the permissions directly to the user.

### **Windows User**

The *Windows User* is a standard windows login which is used to install the Blueprint application. This user should have local Administrator privileges to the web application server (that is, IIS server) where Blueprint is to be installed. The *Windows User* account is required for installation purposes only, and is not used under regular operation of Blueprint.

### **Database System Administrator**

The *Database System Administrator* is an account defined within the SQL server database. This account must have administrator privileges in order to create and update tables within the database server. This account is typically a domain account. However, if the database server is not part of a domain, then the default database administrator account is "sa".

During installation, you must provide the credentials of this *Database System Administrator* account so the Blueprint installer can create the database and grant appropriate permissions to the *Blueprint Server User*. The *Database System Administrator* account is required for installation purposes only, and is not used under regular operation of Blueprint.

### **Client requirements**

The following requirements must be met on each client system:

	Client System
Hardware requirements	<ul> <li>1.6 GHz or faster Pentium 4-class CPU (multi-core recommended)</li> <li>2 GB RAM minimum (3 GB recommended)</li> </ul>

	Client System
Software	Supported operating systems:
requirements	Windows 8
	Windows 7
	Mac OS 10.9 and later
	Supported web browsers:
	<ul> <li>Microsoft Internet Explorer version 9 and later (compatibility mode is not supported)</li> </ul>
	<ul> <li>Mozilla Firefox version 19 and later</li> </ul>
	<ul> <li>Google Chrome version 25 and later (42 and later requires NPAPI to be re- enabled)</li> </ul>
	Safari 7 and later
	Silverlight 5
	<ul> <li>Minimum screen resolution of 1280x1024 (1600x900 or higher recommended)</li> </ul>
	The following system requirements only apply if you plan to use the Blueprint template authoring add-in for template development purposes:
	.NET Framework 4.5
	<ul> <li>Microsoft Office 2010 or 2013</li> </ul>

### **Installation Steps**

- Step 1: Install Blueprint on the web application server
- Step 2: Configure the web application, database and services
- Step 3: Activate Blueprint
- Step 4: Blueprint instance setup
- Step 5: Blueprint client setup

### Step 1: Install Blueprint on the web application server

- Continue to the <u>Automatic Installation</u> section (recommended) if you want to install Blueprint using the Blueprint InstallShield Wizard. After the installation is completed, the Configuration Wizard automatically opens (Step 2).
- Continue to the <u>Blueprint Files Setup</u> section if you want to deploy the Blueprint files and then manually configure the application and database using the command line utilities.

After Blueprint is installed, continue to Step 2: Configure the web application, database and services.

### **Option 1: Automatic Installation**

**BlueprintSetup**.exe extracts all of the application files and configuration utilities that are required for the Blueprint installation.

After you launch the **BlueprintSetup**.exe file, the following InstallShield Wizard appears:

Blue	eprint - InstallShield Wizard ×
blueprint	Welcome to the InstallShield Wizard for Blueprint
	The InstallShield(R) Wizard will install Blueprint on your computer. To continue, click Next.
	WARNING: This program is protected by copyright law and international treaties.
	< Back Next > Cancel

Click Next to continue.

On the next dialog, you can configure the Blueprint installation directory.

18	Blueprint - InstallShield Wizard
Destination Click Ne: folder.	on Folder at to install to this folder, or click Change to install to a different blueprint
Þ	Install Blueprint to: C:\Program Files (x86)\Blueprint Software Systems\Blueprint\ Change
InstallShield	
	< Back Next > Cancel

#### Click Next to continue.

The following wizard appears to start the installation process:

Bluep	rint - InstallShield Wizard	×
Ready to Install the Program The wizard is ready to begin insta	Illation.	blueprint
Click Install to begin the installatio If you want to review or change a the wizard.	ın. ny of your installation settings, click E	Back. Click Cancel to exit
InstallShield	< Back Ins	tall Cancel

Click Install to proceed with the Blueprint installation.

The following dialog is displayed while the installation is in progress.

16	Blueprint - InstallShield Wizard 🛛 🗕 💌
Installing The pro	Blueprint gram features you selected are being installed.
P	Please wait while the InstallShield Wizard installs Blueprint. This may take several minutes.
	Status:
	Copying new files
InstallShield -	
	< Back Next > Cancel

When the installation is complete, the following dialog is displayed:

Blue	eprint - InstallShield Wizard	×	
blueprint	InstallShield Wizard Completed		
	The InstallShield Wizard has successfully installed Blueprint. Click Finish to launch the Blueprint Configuration Wizard.		
	< Back Finish Can	icel	

### **Option 2: Blueprint Files Setup (Manual Installation)**

#### Run BlueprintFiles.exe.

**BlueprintFiles.exe** extracts all of the application files and configuration utilities that are required for the Blueprint installation. After you open **BlueprintFiles.exe**, the following Files Setup Wizard appears:

🔂 Blu	ueprint Files Setu	р	-	<b>x</b>
Choose Install Location Choose the folder in which to install	Blueprint Files.			12
Setup will install Blueprint Files in the Browse and select another folder. Cl			ent folder, clic	k
Destination Folder C:\Program Files (x86)\Blueprint			Browse	
Space required: 358.3MB Space available: 122.1GB Nullsoft Install System v2.46				
		Inst	all	Cancel

Click Install to continue.

When the installation has completed, the following dialog appears:

🔂 Blueprint F	Files Setup	- 🗆 ×
Installation Complete Setup was completed successfully.		12
Completed		
Show details		
Nullsoft Install System v2,46	< Back Close	Cancel

Click Close.

You have successfully deployed the setup files to the web application server.

### Step 2: Configure the web application, database and services

- If you installed the Blueprint files using BlueprintSetup.exe, continue to the <u>Blueprint Configuration Wizard</u> section (recommended) to configure Blueprint using the Configuration Wizard.
- If you manually installed the Blueprint files with BlueprintFiles.exe, continue to the <u>Advanced / Manual</u> <u>Configuration</u> section to configure the application, database and services using the command line configuration utilities.

After configuration is completed, continue to Step 3: Activate Blueprint.

### **Option 1: Blueprint Configuration Wizard**

The Blueprint Configuration Wizard launches automatically after installing Blueprint using the installation wizard.

**Note**: The Blueprint Configuration Wizard is only intended for the initial configuration of Blueprint. Refer to the Appendix to learn more about operations that you may need to run after the initial configuration.

The Blueprint Configuration Wizard dialog allows you to choose your desired configuration:

5	Blueprint Application Configuration	on Wizard 🛛 🗕 🗡
1	Blueprint Configuration Wizard Choose your server configuration.	blueprint
	Before you can use Blueprint, you must configure your se Configuration Waard will guide you through the configura Please specify your server configuration below.	tion process.
	Load configuration from file (Optional)	Select file
	< Bark	Next > Cancel

Select one of the following options and then click Next:

- Distributed-server configuration: This option allows you to host the Blueprint application and database on separate servers. This is the typical configuration. If you choose this option, refer to the <u>distributed-server</u> configuration section below.
- Single-server configuration: This option allows you to host the Blueprint application and database on the same server. This configuration can be useful for demo purposes. If you choose this option, refer to the single-server configuration section below.

**Note:** You can load a configuration file to reproduce a previous Blueprint configuration when deploying the Blueprint application within a web farming framework. A configuration file (**blueprint\_ config.xml**) can be found in the **Setup** folder after a fresh installation is completed.

#### Distributed-server configuration

#### **Application Configuration (Distributed)**

The Application (IIS AppPool and Site) configuration dialog looks like this:

😼 Blueprint Application Configuration Wizard 🛛 🗖 🗙
Blueprint Configuration Wizard Specify your application server settings.
Specify the Ste name Port Number Blueprint 8080  Use HTTP Binding
Host Name (Optiona) Use HTTPS Binding SSL Certificate TSL Certificate
Not selected  Specify the Application Pool Identity  Unit in Account Application Pool Identity
Custom Account Username Password
NOTE: These credentials are required to access the database
< Back Next > Cancel

Complete the following fields and then click Next:

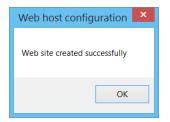
- Specify the Site name: Define the name of the IIS Site. Example: Blueprint
- Port Number: Define the port number of the IIS Site. Example: 8080
- Specify the Binding Type:
  - Use HTTP Binding: Select this option if you want to run Blueprint over HTTP.
  - Use HTTPS Binding: Select this option if you want to run Blueprint over HTTPS. If you choose HTTPS Binding, you must specify an SSL Certificate.
- Specify the Application Pool Identity:

**Note**: The Custom Account refers to the user account that was outlined in the <u>User Prerequisites</u> section of this document. Example: acme\rrunner.

- Username: Specify the name of the <u>Blueprint Server User</u> account that has appropriate permissions on both the application and database servers.
- **Password**: Specify the password for the Blueprint Server User account.

**Important**: Please ensure that you type the correct password. The password is not verified by the wizard.

The following dialog is displayed after the site is created successfully:



#### **HP ALM Legacy Support**

The *Blueprint Application Configuration Wizard* dialog gives you the option of enabling legacy support for versions 12 and earlier of HP ALM:

Biteprint Configuration Wished         Difference           Specify your application server settings.         biteprint of the print			
☑ Enable HP ALM legacy Site Name: Port:	HPALMLegacyConnector		
Window Services Account			
User name:	jsmith		
Password:	*******		
Local System			
Local Service			
Network Service     NOTE: These credentials	are required to access the	database.	

Configure HP ALM legacy support or deselect **Enable HP ALM legacy support** and complete authentication using the following:

Windows Services Account: Enter your Blueprint credentials.

If authentication was successful, a dialog appears:

ALM Service Configuration	<
HP ALM legacy site and job services created successfully.	
ОК	

#### **Database Configuration (Distributed)**

The Database configuration dialog looks like this:

Blueprint Applica	tion Configuration Wizard 🛛 🗕 🔼
Blueprint Configuration Wizard Specify your database server settings.	blueprint
Provide the location of the Databa locahost Specify the name of the new Data Bueprixt System Administrator credentials a the credentials below. © Windows authentication (conn Database Username Password	se Server base re required to setup the database. Please specify
	< Back Next > Cancel

If you choose to setup the database using the Blueprint Configuration Wizard, complete the following fields and then click **Next**:

- Provide the location of the Database Server: The database server must be provided in the following format: [server\_name]\[instance\_name] Example: DBSERVER\INSTANCE01
- Specify the name of the new Database: The database must not already exist.
  - Example: Blueprint
- 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.

A dialog is displayed after the database is setup successfully.

#### **Pack Installation**

The *Blueprint Application Configuration Wizard* dialog gives you the option of enabling the Agile Pack and the Standard Pack:

Blueprint Application Configura	tion Wizard 🛛 🗕 🗆 🗙
Blueprint Configuration Wizard Select the Packs you would like to instal.	blueprint <sup>.</sup>
<ul> <li>✓ AglePack</li> <li>✓ StandardPack</li> </ul>	
< Back	Next > Cancel

If you choose to install any Packs, make your selection(s) and then click Finish.

#### **Phone Home Data Collection**

The *Blueprint Application Configuration Wizard* dialog gives you the option of enabling phone home data collection:

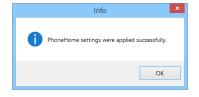
的 Blueprint Upgrade Wizard	×
Blueprint Upgrade Wizard Step 2/3: Select phone home options.	blueprint <sup>.</sup>
I agree to allow the following product-related Information to be aut regular, scheduled basis to Blueprint.	omatically sent on a
<ul> <li>Send Blueprint Usage Information</li> </ul>	
Data related to user interaction with the product and conten artifacts, feature usage, etc.)	t volume (e.g. numbers of
Send Blueprint System Information	
Data related to the technical environment within which Blue	print is operating.
Note: This option requires a user with membership in sysadr	nin fixed server role.
User Name jsmith	
Password ••••••	
The above product-related information is being collected to improv services, inform product decisions and strengthen our focus on cust sensitive personal information will be sent to Blueprint by selecting	omer satisfaction. No
A list of the specific Usage and System information being collected the Blueprint Installation Guide	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:



Single-server configuration

#### **Application Configuration (Single-Server)**

The Application (IIS AppPool and Site) configuration dialog looks like this:

	onfiguration Wizard ur application server settings.		blu	eprint
S	pecify the Site name	Port Num	iber	
	Blueprint	8080		
	Use HTTP Binding			
	Host Name (Optional)			
C	) Use HTTPS Binding SSL Certificate			
	Not Selected			$\vee$
	Decify the Application Pool Iden Built-in Account ApplicationPoolIdentity	uty		
0	Custom Account			
	Username			
	Password			
	NOTE: These credentials are r	equired to access the	e database	

Complete the following fields and then click **Next**:

- Specify the Site name: Define the name of the IIS Site. Example: Blueprint
- Port Number: Define the port number of the IIS Site. Example: 8080
- Specify the Application Pool Identity:
  - Built-in Account
  - Custom Account

**Note**: The Custom Account refers to the user account that was outlined in the User Prerequisites section of this document. Example: acme\rrunner.

- Username: Specify the name of the Blueprint Server User account that has appropriate permissions on both the application and database servers.
- **Password**: Specify the password for the Blueprint Server User account.

**Important**: Please ensure that you type the correct password. The password is not verified by the wizard.

The following dialog is displayed after the site is created successfully:

Web host configuration	x
Web site created successfully	
ОК	

#### **HP ALM Legacy Support**

The *Blueprint Application Configuration Wizard* dialog gives you the option of enabling legacy support for versions 12 and earlier of HP ALM:

Bluepri	nt Application Configuration	on Wizard 🗕 🗆 🗙		
Blueprint Configuration Wizard				
Specify your application se	rver settings.	blueprint		
HP ALM Legacy Support				
(versions prior to 12). E	provides ability to export information y enabling this support Blueprint will bit windows service for processing t	install the HP ALM legacy		
<ul> <li>Enable HP ALM lega</li> </ul>	cy support			
Site Name:	HPALMLegacyConnector			
Port:	8081			
Window Services Account				
User name:	jsmith			
Password:	*******			
Local System				
<ul> <li>Local Service</li> </ul>				
<ul> <li>Network Service</li> </ul>				
NOTE These and arts	Is are required to access the databa			
NOTE: These credentia	is are required to access the databa	se.		
	< Back	Next > Cancel		

Configure HP ALM legacy support or deselect **Enable HP ALM legacy support** and complete authentication using the following:

- Windows Services Account: If you choose Windows Services Account authentication, enter your Blueprint credentials.
- Local System
- Local Service
- Network Service

If authentication was successful, a dialog appears:

ALM Service Configuration
HP ALM legacy site and job services created successfully.
ОК

#### **Database Configuration (Single-Server)**

The *database configuration* dialog looks like this:

Blueprint Configuration Wizard		le le constituet
Sp	ecify your database server settings.	blueprint
	Provide the location of the Database Server	
	localhost	
	Specify the name of the new Database	
	Blueprint	
	System Administrator credentials are require the credentials below.	d to setup the database. Please specify
	Windows authentication (connect as BLI)	UEPRINT\cmcnish)
	<ul> <li>Database</li> </ul>	
	Username	
	Password	
	NOTE: The credentials are required for se	etup purposes only and will not be saved.

If you choose to setup the database using the Blueprint Configuration Wizard, complete the following fields and then click **Next**:

- Provide the location of the Database Server: The database server must be provided in the following format: [server\_name]\[instance\_name] Example: DBSERVER\INSTANCE01
- **Specify the name of the new Database**: The database must not already exist.

Example: Blueprint

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.

A dialog is displayed after the database is setup successfully.

#### **Pack Installation**

The *Blueprint Application Configuration Wizard* dialog gives you the option of enabling the Agile Pack and the Standard Pack:

ý		Application Configu		• ×
	Rueprint Configuration Wizard Select the Packs you would like to install.		bluep	orint
Jence	, , , , , , , , , , , , , , , , , , , ,			
	A sta Da ala			
<ul><li>✓</li></ul>	AgiePack StandardPack			
		< Back	Next >	Cancel

If you choose to install any Packs, make your selection(s) and then click Finish.

#### **Phone Home Data Collection**

The *Blueprint Application Configuration Wizard* dialog gives you the option of enabling phone home data collection:

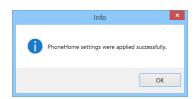
19 <sup>1</sup>	Blueprint Upgrade Wiza	ard ×
Blueprint Upgrade Wiz: Step 2/3: Select phone I		blueprint
I agree to allow the fo regular, scheduled ba	llowing product-related Information to sis to Blueprint.	be automatically sent on a
Send Blueprin	Usage Information	
Data related to artifacts, featu	o user interaction with the product and re usage, etc.)	content volume (e.g. numbers of
Send Blueprin	System Information	
Data related to	the technical environment within which	ch Blueprint is operating.
Note: This opt	ion requires a user with membership in	sysadmin fixed server role.
User Name	jsmith	
Password	•••••	
services, inform produ sensitive personal info	lated information is being collected to ct decisions and strengthen our focus i irmation will be sent to Blueprint by sel sage and System information being col	on customer satisfaction. No lecting either of the above options.
the Blueprint Installat		
< 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:



### **Option 2: Advanced / manual configuration**

This section explains how to setup and configure the web application and database using the configuration utilities (instead of using the *Blueprint Configuration Wizard*). The configuration utilities must be run on the web application server with Administrator privileges.

**Note**: If you completed the full installation using the Wizard, you are NOT required to run the configuration utilities. The configuration utilities are run automatically when you complete the installation using the wizard. You are only required to run the configuration utilities manually if you decide to perform a manual install instead of using the Wizard.

The configuration utilities are located in a folder called **Setup**. The **Setup** folder is located in the directory that you chose for installing Blueprint. For example, the default path is:

C:\Program Files\Blueprint Software Systems\Blueprint\Setup

There are four configuration utility files:

- blueprintwebcmd.exe
- blueprintdbcmd.exe
- blueprintqcwebcmd.exe
- blueprintphonehomecmd.exe

#### 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

#### Configure the web application

Here's a summary of the steps that must be completed to configure the web application:

- Create the Application Pool:
  - This step involves creating an Application Pool.
- Create the Site: This step involves creating a Site with the same name as the Application Pool.
- Configure the connection string: This step tells the application where the database is located and how to communicate with the database.

Below is an example of the commands that can be run to configure the web application:

**Important**: The commands must be run with Administrator privileges on the web application server. Refer to the Configuration Utility Command Reference section for more information about these commands.

1. Create the Application Pool:

```
blueprintwebcmd.exe /object APPPOOL /command ADD /apppoolname
[Blueprint] /userid [acme\rrunner] /password [password]
```

2. Configure the Site:

```
blueprintwebcmd.exe /object SITE /command ADD /wsname [Blueprint]
/port [8080] /dir [C:\Program Files (x86)\Blueprint Software
Systems\Blueprint\Web] /apppoolname [Blueprint]
```

3. Configure the connection string:

```
blueprintwebcmd.exe /object DBCONFIG /command SET /datasource
[DBSERVER\INSTANCE01] /wsname [Blueprint] /integratedsec TRUE /catalog
[BlueprintDB]
```

#### Configure the database

Here's a summary of the steps that must be completed to configure the database:

- Create the database: This step involves creating a database shell, which is a blank container and does not contain any content.
- Add security (that is, add user to the database): This step adds the Blueprint Server User to the database and grants appropriate permissions to the user.
- Initialize the database: This step creates the database schema and pre-populates the database with the data that is necessary to start using Blueprint.

Below is an example of the commands that can be run to configure the database:

Important: The commands must be run with Administrator privileges on the web application server.

**Note:** If you want to use *Windows Authentication* instead of database authentication, you can set the integratedsec parameter to *TRUE* in the commands below and omit the userid and password parameters. Refer to the Configuration Utility Command Reference for more information about these commands.

1. Create the database:

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

2. Add security (that is, add the Blueprint Server User to the database):

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

3. Initialize the database:

```
blueprintdbcmd.exe /object DB /command INIT /datasource
[DBSERVER\INSTANCE01] /catalog [BlueprintDB] /integratedsec FALSE
/userid [dbadmin] /password [pAssw0rd]
```

4. Stop and then restart 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.

#### Configure services

Configuring services is necessary to take advantage of the following functionality in Blueprint:

- Generating documents
- Exporting artifacts to ALM systems
- Generating tests
- HP ALM legacy support for versions 12 and earlier

To install services, see Installing services manually.

**Note:** After finishing the services installation, proceed to Step 3: Activate Blueprint.

#### Run phone home (optional)

You can allow Blueprint to collect usage and system data by running the phone home utility blueprintphonehomecmd.exe. For more information about phone home, see About allowing Blueprint to collect phone home data.

### Step 3: Activate Blueprint

Prior to activating Blueprint, you will see the following message if you navigate to the Blueprint URL (example: http://localhost:8080/):

### The application cannot be run without a valid license. Please contact your Administrator.

You must activate Blueprint using one of the following methods:

- Online activation via internet (recommended)
- Manual offline activation via Email

### **Activating Blueprint using online activation**

Complete the following steps to activate your Blueprint software online:

1. Launch the Blueprint Activation Wizard.

The **BlueprintActivationWizard**. **exe** file is located in a folder called **Setup**. The **Setup** folder is located in the directory that you chose for installing Blueprint. For example, the default path is:

C:\Program Files\Blueprint Software Systems\Blueprint\Setup

The Blueprint Activation Wizard looks like this:

Activate		
in order for the product icense	to work, it must first be activated to receive a valid	blueprint
Please select the web	site you wish to activate	
AppPool:	Site ID:	
Identity:	Path:	
Product:		
How would you like	to activate your Blueprint software	
Online activation	via internet (recommended)	
Manual offline act	tivation via Email	

- 2. Select the website you want to activate by selecting an option from the drop-down list. The drop-down list only displays Blueprint sites.
- 3. Select the **Online activation via internet** option.
- 4. Click Next.

The Online Activation screen appears:

Blue	eprint Activation Wizard	_ 0 ×
Online Activation Please follow the instructions below to activ	vate your Blueprint software	blueprint
Enter the activation key		0.1-12
		Submit
	< Back	Done Cancel

- 5. Type your activation key into the space provided.
- 6. Click Submit.

- A Success dialog appears after Blueprint is activated. Click **OK** to close the dialog.
- 7. Click **Done** to close the Blueprint Activation Wizard.
- 8. Click **Done** to close the Blueprint Activation Wizard.

To verify that Blueprint was activated successfully, navigate to the Blueprint URL (example: http://localhost:8080/). If the software was activated successfully, you will see a login screen instead of the error message.

Continue to Step 4: Blueprint instance setup to setup the Blueprint instance.

### Activating Blueprint using manual offline activation

Complete the following steps to activate your Blueprint software offline:

1. Launch the Blueprint Activation Wizard.

The **BlueprintActivationWizard**. **exe** file is located in a folder called **Setup**. The **Setup** folder is located in the directory that you chose for installing Blueprint. For example, the default path is:

C:\Program Files\Blueprint Software Systems\Blueprint\Setup

The Blueprint Activation Wizard looks like this:

ļ.	Blueprint Activation Wizard	×
Activate In order for the product license	to work, it must first be activated to receive a valid	blueprint
Please select the wel	bsite you wish to activate	
AppPool:	Site ID:	v
Identity: Product:	Path:	
How would you like	to activate your Blueprint software	
<ul> <li>Online activation</li> <li>Manual offline activation</li> </ul>	via internet (recommended) tivation via Email	
	< Back	Next > Cancel

- 2. Select the website you want to activate by selecting an option from the drop-down list. The drop-down list only displays Blueprint sites.
- 3. Select the Manual offline activation via Email option.
- 4. Click Next.

The Offline Activation screen appears:

8	Blueprint Activation Wizard		- • ×
Offline Activation Please follow the instruction can return at a later time for	ons below to activate your Blueprint software. You to upload your license.	bluep	orint
Step 1: Enter activatio	n key and generate Fingerprint.	G	ienerate
Your Fingerprint:			
		Save To File	Copy To
	perprint to Blueprint to obtain a License Blueprint Support at http://www.blueprintsys.com/s		Clipboard
License (.bin file).	I/. After receiving your Fingerprint, the Blueprint Supple (, bin file) and Submit	xort will provide yo	u with a
	are attaching the license to the appropriate website.		
I want to upload my	license later. Note: Blueprint will not be activated ur	Select File	Submit
	< Back	Done	Cancel

- 5. Type your activation key into the space provided.
- 6. Click Generate.

A fingerprint is generated and displayed in the **Your fingerprint** field.

 Send the generated fingerprint to Blueprint Support at <u>http://www.blueprintsys.com/support/incident</u> service\_request/

Tip: Click Save To File or Copy To Clipboard so you don't have to type out the fingerprint manually.

The Blueprint support team will provide you with a license (.bin file) after receiving your fingerprint. To close the Activation Wizard while waiting for your license file, click the I want to upload my license later option and then click Done.

#### Note: Blueprint is not activated yet.

- After you have received your license (.bin file) from the Blueprint support team via Email, you must return to the *Offline Activation* screen to complete the activation. To return to the *Offline Activation* screen, launch the Blueprint Activation Wizard, select a Blueprint site, select the Manual offline activation via Email option and then click Next.
- 9. Click Select File.
- 10. Locate and select the .bin license file.
- 11. Click Submit.

A Success dialog appears after Blueprint is activated. Click **OK** to close the dialog.

- 12. Click **Done** to close the Blueprint Activation Wizard.
- 13. Click **Done** to close the Blueprint Activation Wizard.

To verify that Blueprint was activated successfully, navigate to the Blueprint URL (example: http://localhost:8080/). If the software was activated successfully, you will see a login screen instead of the error message.

Continue to Step 4 to setup the Blueprint instance.

### Step 4: Blueprint instance setup

Complete the following steps to setup your Blueprint instance:

- 1. Login to Blueprint:
  - 1. Open your browser and navigate to the URL where Blueprint is installed.

Example: http://localhost:8080

- If the installation and configuration was successful, the login page is displayed.
- 2. Enter the following credentials and click Login.
  - Login: admin
  - Password: changeme
- 3. Read the EULA and click **I Agree** if you agree to the terms and conditions. You cannot continue until you accept the EULA.
- 2. Change the **admin** account password.
  - Open the *Instance Administration Console* by clicking the application menu Menu and then clicking Manage > Access the Instance Administration Console.
  - 2. Open the Users tab by clicking Manage Users And Groups > Users on the ribbon.
  - Click the admin user in the table.
     The user details are displayed in the panel on the right of the window.
  - 4. Click the **Change Password** button located at the bottom of the panel on the right side of the window.
  - 5. Type the new password in the appropriate fields and click **OK**.
  - 6. Click Save.
  - 7. Remain in the Instance Admin Console, and proceed to the next step.
- 3. Create a new user for administration purposes and assign instance admin rights to the new user:

**Note**: We recommend creating a new user account for administration purposes so the **admin** account remains intact as a backup administration account. For example, if you create a new account called **administrator**, and then later accidentally revoke instance administration privileges from the **administrator** account, you can reapply those permissions using the **admin** account.

- Create a new Database user by clicking New > New Database User on the ribbon. A new user (<New User>) is added to the table.
- 2. On the rightmost panel, enter the information for your new administrator user.

Important: Ensure that you place a checkmark beside the Instance Admin option.

- 3. Click Save.
- 4. Log off Blueprint using the Logout link located in the upper right corner of the application.
- 5. Log on to Blueprint using the new user that you created (example: administrator).
- 6. (Optional) Set up active directory integration. Refer to the *Instance Administration Guide* for more information.

To configure default active directory integration:

- 1. Open the Instance Administration Console.
- 2. Click Active Directory Settings.
- 3. Select the Enable Active Directory Integration option.
- 4. Select the Use default connection on identity option.

**Note**: The default connection only works if your Blueprint Server User (example: **acme\rrunner**) is a member of the active directory and the Blueprint Application Server is also a member of the active directory.

5. Click Save.

To configure custom active directory integration:

- 1. Open the Instance Administration Console.
- 2. Click Active Directory Settings.
- 3. Select the Enable Active Directory Integration option.
- 4. Select the Use custom Active Directory integration option.
- 5. Click the **Add** button.
- 6. Specify the active directory information on the rightmost side of the screen:
  - Setting Name: Choose a name for this active directory server so you can easily identify it in the list.
  - Bind User: Defines the user name of a user that has access to read from the active directory server. This user name must be the SamAccountName of the Bind User (not the common name, as per RC2010).

Note: The Bind User must be specified like this: [DomainName]\[UserName]. Example: BPTEST\root

- **Bind Password**: Defines the password of the Bind User.
- Active Directory Authentication URL: Defines the authentication URL of the active directory server. Example: LDAP://bpsdcneo.blueprint.toronto/DC=blueprint,DC=Toronto
- 7. Click Save.
- 7. (Optional) Setup federated authentication if you want to enable Blueprint's single sign-on capabilities.
- 8. (Optional) Setup the Email Settings (SMTP) if you want to enable notifications.
- 9. Create projects.
- 10. Add users to Blueprint.
- 11. Create license groups.
- 12. Grant access to projects by creating project role assignments.

### **Instance administration tips**

- Project Templates: You may want to consider creating one or more new project(s) in a folder called Templates. Then, you can create new projects using those templates. Project templates provide an efficient way to setup project groups and roles once, rather than configuring the project roles and groups every time you create a new project.
- Access Rights: Consider using groups when you create project role assignments instead of including

individual users. For example, whenever a new user requires *write* access to the **Getting Started** project, all you need to do is add the new user to Blueprint and then add the user to the **All Authors** group. The new user will immediately have access to all projects that include the **All Authors** group in a project role assignment.

### Step 5: 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

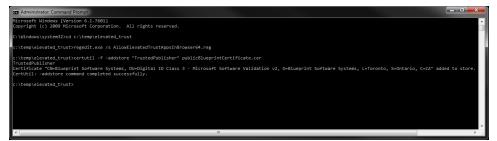
For 32-bit operating systems:

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 (blueprintwebcmd.exe)

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 (blueprintdbcmd.exe)

Parameter	Description	Default	Example
/object	Defines the object type of the command. This parameter can be set to one of the following values: SERVER DB USER		
/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: TRUE FALSE 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 (blueprintqcwebcmd.exe)

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 (blueprintphonehomecmd.exe)

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:		
	<ul><li>TRUE</li><li>FALSE</li></ul>		
/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			
	oftware Systems Inc. All rights reserved ersion: 6.2 (6.2)			

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.

# **blueprint**

- **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.

Parameter name	Default value	Description
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.
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.
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
	value value	Parameter name         value           value         false           value         None

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" value=""&gt; The minimum value it can be changed to is 3 and the maximum is 60.</add </connectionstrings>
<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>

# **blueprint**

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
			<pre>rval value should always be less than the sessionState value (timeout).</pre>
<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 <u>collection parameter</u> must also be set to <b>TRUE</b> 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 <u>preceding</u> <u>service parameter</u> must also be set to <b>TRUE</b> 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><automiesting> <appsettings> </appsettings></automiesting></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

# blueprint

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=&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).

#### 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.