

Blueprint 9.0

Project Administration Guide

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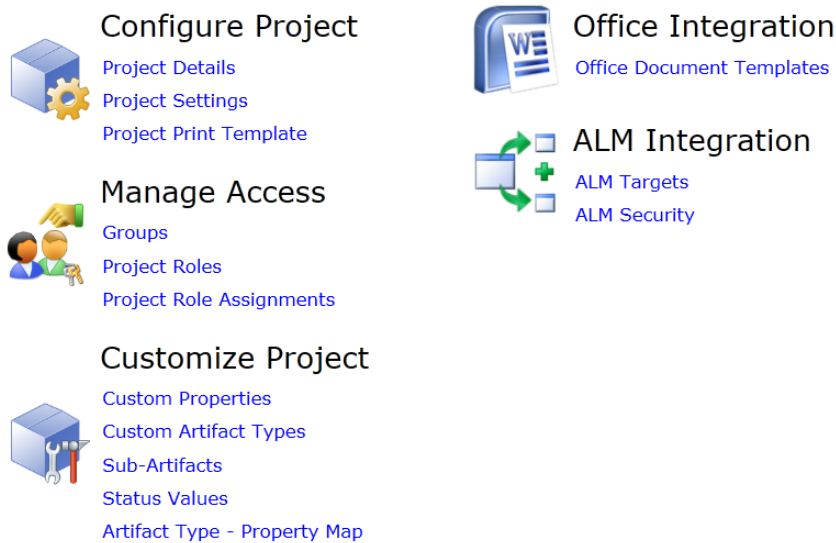
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Project Administration

Blueprint's *Project Admin Editor* allows you to manage all aspects of the project, such as groups, project roles, custom artifact properties, custom artifact types, and status values. You can also configure your document templates and integrations.

The *Project Admin Editor* looks like this:



The *Project Admin* editor provides you with access to the following settings:

- **Project Details:** Allows you to [set the name and description of the project](#).
- **Project Settings:** Allows you to [modify various project-wide settings](#), such as the ability to enable or disable comment modification.
- **Project Print Template:** Allows you to [modify the default template that is used for exporting and printing artifacts](#).
- **Groups:** Provides you with the ability to [manage groups and group members](#). You can add users or groups to a group.
- **Project Roles:** Provides you with the ability to [define and manage roles](#), using on a number of privileges that can be granted to each role.
- **Project Role Assignments:** Allows you to [assign users or groups to a role](#). Project roles can be assigned at the project level, or you can limit the scope of the project role to a folder or artifact.
- **Custom Properties:** Allows you to [create custom properties](#). You can apply custom properties and standard properties to individual artifact types.
- **Custom Artifact Types:** Allows you to [manage custom artifact types](#). You can create new custom artifact types, modify existing custom artifact types, and associate custom properties with custom artifact types.
- **Sub Artifacts:** Allows you to [associate custom properties with sub-artifact types](#).
- **Status Values:** Allows you to [manage status values](#). You can create new status values for approvals and discussions, or modify existing status values.
- **Artifact Type - Property Map:** Allows you to [view the associations between artifact types and properties within the project](#).
- **Office Document Templates:** Allows you to [manage office document templates](#) so users can export Blueprint artifacts to Microsoft Word and Microsoft Excel documents.

- **ALM Integration Targets:** Allows you to [manage ALM integration targets](#) so users can export Blueprint artifacts and test plans to ALM systems.
- **ALM Integration Security:** Allows you to [manage ALM integration target security](#) so you can control which users can access each ALM target.

Defining and managing project roles

In Blueprint, privileges are defined by [certain project administrators](#) at the project role level. Project roles offer you a powerful way to control access to the project. You can use project roles to define various levels of access based on your team or organization's needs. You can then assign users and groups to the appropriate project roles.

Example

John, a senior business analyst, has been asked to create project roles for two different groups of users. The requirements authors require the ability to view, modify, and establish trace relationships. The reviewers of the artifacts only require the ability to view and comment on artifacts.

John creates two new project roles called **Authors** and **Reviewers**. He grants the **Authors** role the following privileges: **Read**, **Edit**, and **Trace**. John grants the **Reviewers** role the **Read** and **Comment** privileges.

Project roles are defined and managed using the *Project Roles* tab in the *Project Administration Console*. The *Project Roles* tab looks like this:

The screenshot displays the 'Project Roles' tab in the 'Project Administration Console'. On the left, a table lists existing roles: 'Author' (Read, Edit, Trace, Comment), 'Collaborator' (Read, Comment), 'Project Administrator' (Read, Edit, Trace, Comment, Steal Lock, and Project Admin), and 'Reader' (Read Only). On the right, the 'Project Role Details' for the 'Author' role are shown. This includes fields for 'Name' (Author), 'Description' (Author = Read, Edit, Trace, Comment), and a list of 'Privileges' with checkboxes for Read, Create and Edit, Delete, Trace, Comment, Delete Any Comment, Steal Lock, Can Report, Share via Home Page, Reuse, and Excel Update. Below the privileges, there is a dropdown for 'Project Administrator Role' set to 'Default Project Administrator' and a description of the administrator role. 'Save' and 'Cancel' buttons are at the bottom right.

Each role has a name, description, and a set of privileges. The following privileges can be applied to a project role:

Privilege	Description
Read	Provides the ability to view artifacts.
Create and Edit	Provides the ability to modify and publish artifacts. If the Create and Edit privilege is granted, the Read privilege is automatically granted.
Delete	Provides the ability to delete artifacts.

Privilege	Description
Trace	Provides the ability to create trace relationships between artifacts. If the Trace privilege is granted, the Read privilege is automatically granted. Note: In order to create a trace, the user must also have Create and Edit permissions on at least one of the artifacts.
Comment	Provides the ability to add new comments and replies. If the Comment privilege is granted, the Read privilege is automatically granted.
Delete Any Comment	Provides the ability to delete comments and replies.
Steal Lock	Provides the ability to steal the lock from other users. If the Steal Lock privilege is granted, the Read and Create and Edit privileges are automatically granted. Warning: Stealing a lock discards all unpublished changes of the user that previously held the lock.
Can Report	Provides the ability to produce Blueprint Analytics reports. If the Can Report privilege is granted, the user can produce Blueprint Analytics reports using the project data in PowerPivot. Note: Blueprint Analytics reporting requires a Blueprint Analytics license.
Share via Home Page	Provides the ability to share projects and artifacts to the Home page, allowing all other users with author or collaborate licenses to view the item under <i>Shared Items</i> .
Reuse	Provides the ability to reuse artifacts that have standard artifact types.
Excel Update	Provides the ability to update artifacts by importing a Microsoft Excel spreadsheet containing artifact data. Note: Excel Update must be enabled in the Instance Settings (Instance Administration Console) for the Excel Update role privilege to be available.
Create and Edit Rapid Review	Provides the ability to create a Rapid Review from a collection of artifacts. By default, this privilege is enabled for the Author project role.

Creating project roles

Creating project roles allows you to maintain various levels of access to the project.

To create a new project role:

1. Open the *Project Roles* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Project Roles** link.
The *Project Roles* tab is displayed.
2. Click the **New** button.
A new role appears in the Project Role list.
3. Provide a name for the project role.
4. Provide a description for the project role.
5. Select the privileges you want to grant to the project role.

Place a checkmark beside the privileges that are applicable to the project role:

Privilege	Description
Read	Provides the ability to view artifacts.
Create and Edit	Provides the ability to modify and publish artifacts. If the Create and Edit privilege is granted, the Read privilege is automatically granted.
Delete	Provides the ability to delete artifacts.
Trace	Provides the ability to create trace relationships between artifacts. If the Trace privilege is granted, the Read privilege is automatically granted. Note: In order to create a trace, the user must also have Create and Edit permissions on at least one of the artifacts.
Comment	Provides the ability to add new comments and replies. If the Comment privilege is granted, the Read privilege is automatically granted.
Delete Any Comment	Provides the ability to delete comments and replies.
Steal Lock	Provides the ability to steal the lock from other users. If the Steal Lock privilege is granted, the Read and Create and Edit privileges are automatically granted. Warning: Stealing a lock discards all unpublished changes of the user that previously held the lock.
Can Report	Provides the ability to produce Blueprint Analytics reports. If the Can Report privilege is granted, the user can produce Blueprint Analytics reports using the project data in PowerPivot. Note: Blueprint Analytics reporting requires a Blueprint Analytics license.
Share via Home Page	Provides the ability to share projects and artifacts to the Home page, allowing all other users with author or collaborate licenses to view the item under <i>Shared Items</i> .
Reuse	Provides the ability to reuse artifacts that have standard artifact types.
Excel Update	Provides the ability to update artifacts by importing a Microsoft Excel spreadsheet containing artifact data. Note: Excel Update must be enabled in the Instance Settings (Instance Administration Console) for the Excel Update role privilege to be available.
Create and Edit Rapid Review	Provides the ability to create a Rapid Review from a collection of artifacts. By default, this privilege is enabled for the Author project role.

6. Select the project administrator role with the administrative privileges that you want the project role to have.
7. If applicable, assign a meaning of signature to the project role, to further clarify their position when signing off with electronic signatures.
This option is available if the meaning-of-signature feature has been enabled in the *Project Settings* tab.
8. Click **Save**.

After you have created a project role, you may want to [assign users or groups to the role](#). You can also modify the project role details or privileges at any time.

Modifying project roles

Warning: If you modify the privileges granted to a role, all users and groups assigned to that role are affected.

To modify an existing project role:

1. Open the *Project Roles* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Project Roles** link.
The *Project Roles* tab is displayed.
2. Select the project role you want to modify.
Select a project role by clicking a row in the table. The role details are displayed on the right side of the page.
3. Modify the project role name, if desired.
4. Modify the project role description, if desired.
5. Modify the privileges of project role, if desired.
Place a checkmark beside the privileges that are applicable to the project role.
6. Modify the meaning of signature assigned to the role, if desired.
This option is available if the meaning-of-signature feature has been enabled in the *Project Settings* tab.
7. Click **Save**.

Managing project-level groups

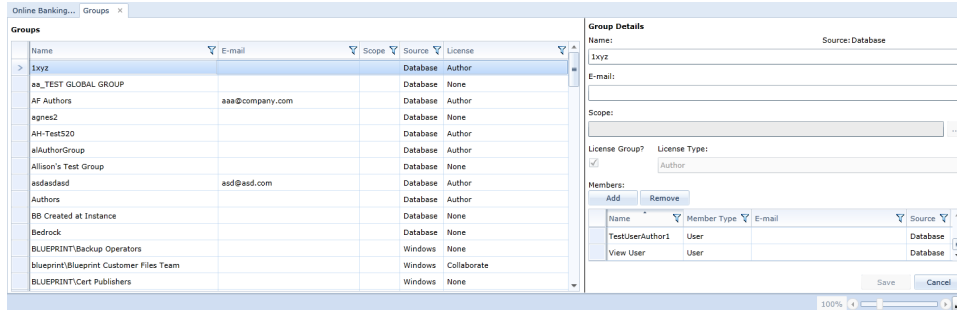
User creation must be performed by an instance administrator but, with the correct privileges, project administrators can create project-level groups and add users to groups. Project administrators can also add groups to other groups. After a group is created, the group details can be edited and group members can be added or removed as needed.

Note: Project administrators can only modify groups that exist at the project level. Project administrators can use groups that exist at the instance level, but cannot modify instance-level groups.

Project-level groups are managed using the *Groups* tab in the *Project Administration Console*. When you open the *Groups* tab, the groups are displayed in the leftmost panel, and the group details are displayed in the rightmost panel.

Note: The *Groups* tab in the *Project Administration Console* displays all project-level groups for this project, and all instance-level groups. Project administrators with the right privileges can create, modify, and delete project-level groups from the *Project Administration Console*. However, project administrators cannot create, modify, or delete instance-level groups from the *Project Administration Console*.

The *Groups* tab looks like this:



Understanding the Groups Tab

The Groups tab is accessible from both the Instance Administration Console and the Project Administration Console, but your ability to perform certain operations differs slightly depending on whether you are an instance administrator or a project administrator.

The left side of the *Groups* tab provides you with a table containing the following columns of information about each group:

- **Name:** Indicates the name of the group.
- **Email:** Indicates the group email address.
- **Scope:** Indicates the scope of the group. If a scope is defined, the group is only visible at the specified project level. If no scope is defined, the group is visible within all projects.

Note: Groups that are created at the instance-level cannot be modified by project administrators, regardless of the group scope.

- **Source:** Indicates the source of the group. The value in this column can be either *Database* or *Windows*. Blueprint only allows project administrators with the applicable privileges to manage *Database* groups. *Windows* groups are derived from the Active Directory, therefore cannot be managed by the project administrator.

After you select a group from the table, the group details are displayed on the right side of the page, including the list of group members. The group members are displayed in a table with the following columns of information about each member:

- **Name:** Indicates the name of the group member.
- **Member Type:** Indicates whether the group member is a user or a group.

Tip: You can add groups to other groups.

- **Email:** Indicates the email address of the group member.
- **Source:** Indicates whether the group member source is *Windows* (Active Directory) or the Blueprint *Database*.

Note: Both *Windows* and *Database* member sources can be added to a *Database* group.

- **Scope:** Indicates the scope of the group.
- **License Type:** Indicates whether the license is Author, Collaborator or View.

Creating project-level groups

[Project administrators with the applicable privileges](#) can create groups at the project level. This means that the group is accessible to a single project. Instance administrators with the applicable privileges have the ability to create groups at the instance level. Groups at the instance level are accessible by all projects.

To create a new project-level group:

1. Open the *Groups* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Groups** link.
The *Groups* tab is displayed.
2. Click the **New** button on the ribbon and select **New Database Group**.
The new group is created and the details of the new group are displayed in the *Group Details* panel on the right side of the page.
3. Provide a name for the group.
4. Provide an email address for the group, if applicable.
5. Add members to the group.
Read more about [adding members to a group](#).
6. Click **Save**.

After you have created a group, you can modify the group details or group members at any time.

Modifying project-level groups

[Project administrators with the correct privileges](#) can only modify groups that exist at the project level. Project administrators can use groups that exist at the instance level, but cannot modify instance-level groups.

Note: If you remove a user from a group, the user may lose project privileges. For example, if the group is assigned to a role with *Project Admin* privileges, the user will lose the *Project Admin* privileges after being removed from the group.

To modify an existing project-level group:

1. Open the *Groups* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Groups** link.
The *Groups* tab is displayed.
2. Select the group you want to modify.
Select a group by clicking a row in the table. The group details are displayed on the right side of the page.
3. Modify the group name, if desired.
4. Modify the group email address, if desired.
5. Add or remove group members, if desired.

Read more about [adding members to a project-level group](#) and [removing members from a project-level group](#).

6. Click **Save**.

Adding members to a project-level group

Adding a user to a group is a quick and easy way to grant the user access to the system. When you add a user to a group, the user gains all role privileges that are assigned to the group.

[Project administrators with the applicable privileges](#) can only add members to groups that exist at the project level. Project administrators can use groups that exist at the instance level, but cannot modify instance-level groups.

To add members to a project-level group:

1. Open the *Groups* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Groups** link.

The *Groups* tab is displayed.
2. Select the group you want to modify.

Select a group by clicking a row in the table. The group details are displayed on the right side of the page.
3. Click the **Add** button.

The *Select Members* dialog appears.
4. Select the user(s) and/or group(s) that you want to add to the group.

You can select multiple items by holding the **Ctrl** key and clicking multiple users and groups. Click the *Groups* or *Users* tab to toggle between the users list and groups list.
5. Click **OK** to add the selected user(s) and/or group(s) to the group.
6. Click **Save**.

Removing members from a project-level group

Project administrators can only remove members from groups that exist at the project level. Project administrators can use groups that exist at the instance level, but cannot modify instance-level groups.

Note: If you remove a user from a group, the user may lose project privileges. For example, if the group is assigned to a role with Project Admin privileges, the user will lose the Project Admin privileges after being removed from the group.

To remove members from a project-level group:

1. Open the *Groups* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Groups** link.

The *Groups* tab is displayed.
2. Select the member(s) that you want to remove from the group.

You can select multiple items by holding the **Ctrl** key and clicking multiple users and groups.

3. Click the **Remove** button.
4. Click **Save**.

Managing project role assignments

Project role assignments link the privileges defined in project roles with the users defined in groups; it then applies this access level to a defined part of a project, ranging from a single artifact to the entire project.

Using project role assignments, project administrators can grant or restrict access to specific parts of a project, for specific groups of users.

Example

Cathy, a business analyst, wants to obtain feedback from the legal team on artifacts in a project. The individuals on the legal team are already included in a group called **Legal Team** and there is already a project role called **Reviewers** that includes **Read** and **Comment** privileges across the entire project.

Cathy simply assigns the **Legal Team** group to the **Reviewers** project role. All of the individuals on the legal team can now view and comment on artifacts in the project.

Project role assignments are performed on the *Project Role Assignments* tab in the *Project Administration Console*. When you open the *Project Role Assignments* tab, the project role assignments are displayed in the leftmost panel, and the role assignment details are displayed in the rightmost panel. The *Project Role Assignments* tab looks like this:

The screenshot shows the 'Project Role Assignments' interface. The left panel contains a table with the following data:

Identity	Identity Type	Project Role	Scope
> Zuser	User	power ba	Cross-Project Move
docstest	User	Project admin for modifying structure	Cross-Project Move
docstest2	User	author	Cross-Project Move

The right panel, titled 'Project Role Assignment Details', shows the following information:

- Identity:** User : Zuser
- Project Role:** power ba
- Scope:**
 - ☒ Project
 - ☐ Folder or Artifact

At the bottom right of the right panel are 'Save' and 'Cancel' buttons. The bottom status bar shows '100%' zoom and navigation icons.

The left side of the page provides you with a table containing the following columns of information about each project role assignment:

- **Group:** The name of the group that is assigned to the role.
- **Project Role:** The project role assigned. Roles are defined by project administrators on the *Project Roles* tab.
- **Scope:** The project, folder, or artifact to which the project role's privileges are applied. Project role assignments can be applied at the project level, or the artifact/folder level. If the scope is set to a folder, users have access to, or are restricted to, everything in that folder (including subfolders) including newly added artifacts.

After you select a project role assignment from the table, the project role assignment details are displayed on the right side of the page.

Creating project role assignments

Adding a new project role assignment grants privileges to a group based on the selected project role. The project role assignment can be applied to the entire project, or limited to a particular folder or artifact.

Note: Each project role assignment grants access to a selected group. In cases where you want to assign a project role to multiple users that are spread across different groups, or are not members of any group, you can [create a project-level group](#) that includes these users, then create a project role assignment for that group.

To add a new project role assignment:

1. Open the *Project Role Assignments* tab.

1. Open the *Project Administration Console*.
2. Click the **Project Role Assignments** link.
The *Project Role Assignments* tab is displayed.

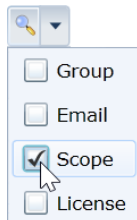
2. Click the **New** button on the ribbon.

The *Select Group* dialog is displayed, listing all groups that have access to the project.

3. Select the group for the new role assignment and click **OK**.

To help you search for the desired group, you can filter the list:

- You can *Search groups based on a user's display name* if you want to assign the project role to a particular user. Entering and selecting a user displays any groups they are a member of, and that have access to the project.
- You can also *Search groups based on a group's property*. By default, entering a term filters the list to matching group names. You can click the search drop-down to configure the search to filter the list based on the group's email address, project scope, or license type:



After you click **OK**, the new project role assignment is created and the details of the new role assignment are displayed in the *Project Role Assignment Details* panel on the right side of the page.

4. Select the **Project Role** that you want to assign.
5. Set the project role assignment **Scope**.

The project role assignment scope allows you to control whether the project role assignment applies to the entire project, or to a specific folder or artifact.

6. Click **Save**.

After you add a project role assignment, you can modify the project role assignment details at any time.

Modifying project role assignments

When you update a project role assignment, the changes are effective immediately. If the identity is changed, the previous group immediately loses the privileges defined in the project role, and the newly selected identity gains the privileges.

To modify a project role assignment:

1. Open the *Project Role Assignments* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Project Role Assignments** link.
The *Project Role Assignments* tab is displayed.
2. Select the project role assignment you want to modify by clicking its row in the *Project Role Assignments* table.
The role assignment details are displayed on the right side of the page.
3. Change the project role, if desired.
4. Change the scope of the project role assignment, if desired.
5. Click **Save**.

Deleting project role assignments

When you delete a project role assignment, the group immediately loses the privileges defined by that role.

To delete a project role assignment:

1. Open the *Project Role Assignments* tab:
 1. Open the *Project Administration Console*.
 2. Click the **Project Role Assignments** link.
The *Project Role Assignments* tab is displayed.
2. Select the project role assignment you want to modify by clicking its row in the *Project Role Assignments* table.
The role assignment details are displayed on the right side of the page.
3. Click the **Delete** button on the ribbon.

Managing custom artifact types

[Project administrators with the correct privileges](#) can create custom artifact types at the project level to meet the needs of the project. Each custom artifact type must have a unique ID prefix and must be associated with one of the pre-configured base types. Custom artifact types provide you with an extremely large amount of flexibility in the way you categorize the artifacts in your projects.

Example

Tyler, a business analyst, is configuring a new project which involves the creation of a large number of business and functional requirements in textual form. He wants to ensure there is a high level of visibility between business and functional requirements.

He considered adding a custom property (with *Business* or *Functional* options) to the existing **Textual Requirement** artifact, but he feels it will not offer enough visibility.

Tyler decides to create two different artifact types called **Business Requirements** and **Functional Requirements**. He sets the `Base Type` to `TextualRequirement` for both of the new artifact types. Tyler deletes the existing **Textual Requirement** artifact type as it is no longer needed. Now, users must choose between a business requirement or a functional requirement when creating a new requirement.

Project administrators with the correct privileges can create and edit custom artifact types using the *Custom Artifact Types* tab in the *Project Administration Console*. The *Custom Artifact Types* tab looks like this:

Wynags Air - Reserv...

Custom Artifact Types ×

Drag a column header and drop it here to group by that column

Prefix	Name	Base Type	Group Label	Is Standard	Use In This Project
BUS	Business Requirement	Textual Requirement	Standard Artifact Types	☒	☒
NON	Non-functional Requirement	Textual Requirement	Standard Artifact Types	☒	☒
CUST	Customer	Actor	Standard Artifact Types	☒	☒
FEAT	Feature	Textual Requirement	Standard Artifact Types	☒	☒
THE	Theme	Textual Requirement	Standard Artifact Types	☒	☒
EP	Epic	Textual Requirement	Standard Artifact Types	☒	☒
USE	User Story	Textual Requirement	Standard Artifact Types	☒	☒
UC-STD	Use Case (Standard)	Use Case		☒	☒
SB-STD	Storyboard (Standard)	Storyboard		☒	☒
TR-STD	Text Requirement (Standard)	Textual Requirement		☒	☒
BP-STD	Business Process (Standard)	Business Process Diagram		☒	☒
SEC	Security Requirement (STD)	Textual Requirement		☒	☒
STD-PRF	Performance Requirement	Textual Requirement		☒	☒
CO-STD	Compliance Requirement	Textual Requirement		☒	☒
TBP Prefix	To Be Promoted	Generic Diagram	TBP Group Label	☒	☒
STDDOC	Standard Document	Document		☒	☒
STB Pref	Standard Baseline	Baseline		☒	☒
STD Rev Prefix	Standard Review	Review		☒	☒
RAC	Demo Reuse Actor	Actor	Reuse Demo	☒	☒
RUC	Reuse Use Case	Use Case	Reuse Standard Artifact Types	☒	☒
Reuse 2	SAT Glossary	Glossary	Reuse Standard Artifact Types	☒	☒
Reuse 1	SAT Use Case Diagram	Use Case Diagram	Reuse Standard Artifact Types	☒	☒
Reuse 3	SAT Domain Diagram	Domain Diagram	Reuse Standard Artifact Types	☒	☒
Reuse 4	SAT Generic Diagram	Generic Diagram	Reuse Standard Artifact Types	☒	☒
Reuse 5	SAT UI Mockup	UI Mockup	Reuse Standard Artifact Types	☒	☒
Reuse 6	SAT Baseline	Baseline	Reuse Standard Artifact Types	☒	☒
Reuse 7	SAT Business Process Diagram	Business Process Diagram	Reuse Standard Artifact Types	☒	☒
Reuse 8	SAT Storyboard	Storyboard	Reuse Standard Artifact Types	☒	☒

Artifact Type Details

Name

Use Case (Standard)

Icon

Change

Prefix

UC-STD

Tooltip

Edit Description

Group Label

Base Type

Use Case

Default Description

Portable User Interface

☒ Use This Artifact Type In This Project

Artifact Properties

Manage Properties

Group	Name	Width	Height	Add Property
General				
	Name	1 Column		Remove Property
	ArtifactType	1 Column		Edit Property
	Regulation Date	1 Column		
	Release	1 Column		
	Risk	1 Column		
Details				
	Description			

Advanced

Save

Cancel

The left side of the page provides you with a table containing the following columns of information about each artifact type:

- **Name:** Indicates the name of the artifact type. This name appears in the list of options when users are selecting a new artifact to create. It also appears in the *Artifact Type* column when users are viewing the artifact list.
- **Prefix:** Indicates the ID prefix of the artifact type. Prefixes are unique across artifact types. All artifacts have a unique ID that begins with this prefix.
- **Tooltip:** If specified, provides a tooltip description when users are selecting a new artifact to create and they hover over the artifact type.
- **Group Label:** If specified, this artifact type appears under the specified label when users are selecting a new artifact to create.
- **Base Type:** All artifact types must have a base type. The base type determines the type of editor that is used when a user opens an artifact. The available base types are pre-configured.
- **Is Standard:** Indicates the artifact type exists in all projects across the instance.

Note: Standard artifact types can only be edited at the instance level by instance administrators with the [applicable privileges](#).

After you select a custom artifact type from the table, the custom artifact type details are displayed on the right side of the page.

Creating custom artifact types

You can create custom artifact types in order to meet the needs of your project.

Tip: Instance administrators with the correct privileges have the option of creating standard artifact types that exist across all projects in the instance, not just in individual projects.

To create a new custom artifact type:

1. Open the *Custom Artifact Types* tab.

1. Open the *Project Administration Console*.
 2. Click the **Custom Artifact Types** link.

The *Custom Artifact Types* tab is displayed.

2. Click the **New** button on the ribbon.

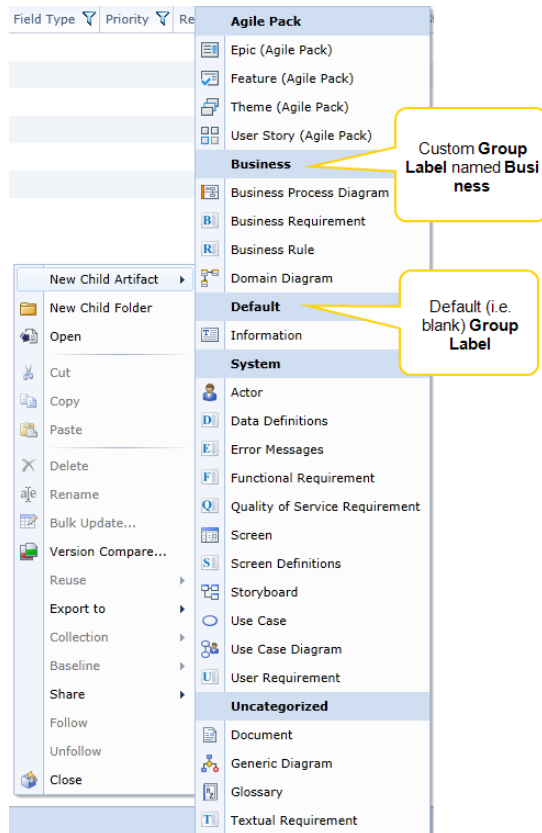
The new artifact type is created and the details of the artifact type are displayed in the *Artifact Type Details* panel on the right side of the page.

3. Specify the artifact type details.

- **Name:** Indicates the name of the artifact type. This name appears in the list of options when users are selecting a new artifact to create. It also appears in the *Artifact Type* column when users are viewing the artifact list.
- **Icon:** If a new icon is added, the new icon appears in the list of options when users are selecting a new artifact to create. It also appears in the *Artifact Type* column when users are viewing the artifact list. Any uploaded icon should be a PNG or JPG file that is 32x32 pixels.
- **Prefix:** Indicates the ID prefix of the artifact type. Prefixes are unique across artifact types. All artifacts have a unique ID that begins with this prefix.

Note: The following base type prefixes are already in use within Blueprint: **AC, BP, DOC, DD, GD, GL, PF, PR, RQ, SB, UC, UCD, UM.**

- **Tooltip:** Provides a description of the artifact type when you pause on an item with the artifact type in the artifact list.
- **Group Label:** If specified, this artifact type appears under the specified label when users are selecting a new artifact to create. To set the group label, simply use the drop-down to select an existing group label, or type the name of a new group label into the field. If no value is specified, the artifact types appear under the *Default* label.
In the example below, all artifact types are displayed under the *Default* label, except for the artifacts under the label called **Textual Requirement Group**:



- **Base Type:** All artifact types must have a base type. The base type determines the type of editor that is used when a user opens an artifact. The available base types are pre-configured.
- **Description:** Provides a description of the artifact type, such as the purpose or intended usage.
- **Properties:** Indicates any custom properties that are applied to this artifact type. Place a check mark beside the custom properties that are applicable to this artifact type. Click the **Manage Properties** link to add or manage custom properties.

Tip: You can [customize the display order and layout of properties](#).

4. Click **Save**.

Important: To see any changes you have made to custom artifact types, you need to click the ribbon menu icon and then click **Refresh All**.

Modifying custom artifact types

To modify an existing custom artifact type:

Warning: Modifying an existing custom artifact type can result in data loss! For example, if you change the **Base Type** of an artifact type from *GenericDiagram* to *TextualRequirement*, the existing artifacts of that type will no longer contain diagrams.

1. Open the *Custom Artifact Types* tab.

1. Open the *Project Administration Console*.
2. Click the **Custom Artifact Types** link.

The *Custom Artifact Types* tab is displayed.

2. Select the artifact type you want to modify.

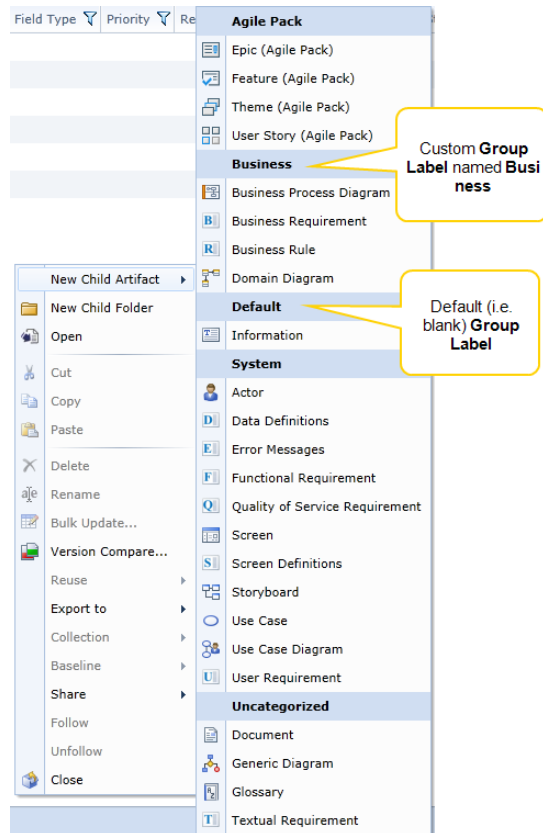
Select an artifact type by clicking a row in the table. The artifact type details are displayed on the right side of the page.

3. Update the artifact type details.

- **Name:** Indicates the name of the artifact type. This name appears in the list of options when users are selecting a new artifact to create. It also appears in the *Artifact Type* column when users are viewing the artifact list.
- **Icon:** If a new icon is added, the new icon appears in the list of options when users are selecting a new artifact to create. It also appears in the *Artifact Type* column when users are viewing the artifact list. Any uploaded icon should be a PNG or JPG file that is 32x32 pixels.
- **Prefix:** Indicates the ID prefix of the artifact type. Prefixes are unique across artifact types. All artifacts have a unique ID that begins with this prefix.

Note: The following base type prefixes are already in use within Blueprint: **AC, BP, DOC, DD, GD, GL, PF, PR, RQ, SB, UC, UCD, UM.**

- **Tooltip:** Provides a description of the artifact type when you pause on an item with the artifact type in the artifact list.
- **Group Label:** If specified, this artifact type appears under the specified label when users are selecting a new artifact to create. To set the group label, simply use the drop-down to select an existing group label, or type the name of a new group label into the field. If no value is specified, the artifact types appear under the *Default* label.
In the example below, all artifact types are displayed under the *Default* label, except for the artifacts under the label called **Textual Requirement Group**:



- **Base Type:** All artifact types must have a base type. The base type determines the type of editor that is used when a user opens an artifact. The available base types are pre-configured.
- **Description:** Provides a description of the artifact type, such as the purpose or intended usage.
- **Properties:** Indicates any custom properties that are applied to this artifact type. Place a check mark beside the custom properties that are applicable to this artifact type. Click the **Manage Properties** link to add or manage custom properties.

Tip: You can [customize the display order and layout of properties](#).

4. Click **Save**.

Deleting custom artifact types

To delete a custom artifact type:

Note: Before you can delete a custom artifact type, you must delete all existing artifacts of that particular type.

1. Open the *Custom Artifact Types* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Custom Artifact Types** link.

The *Custom Artifact Types* tab is displayed.

2. Select the artifact type you want to delete.

Select an artifact type by clicking a row in the table. The artifact type details are displayed on the right side of the page.

3. Click the **Delete** button on the ribbon.

The confirmation dialog appears.

4. Click **OK** to confirm the deletion.

Customizing the layout of custom properties

Project administrators with the correct privileges can customize the layout of custom artifact properties in order to control how the information is presented to Blueprint users. For example, you can display your custom property data using tabs, or adjust the width and height of text properties.

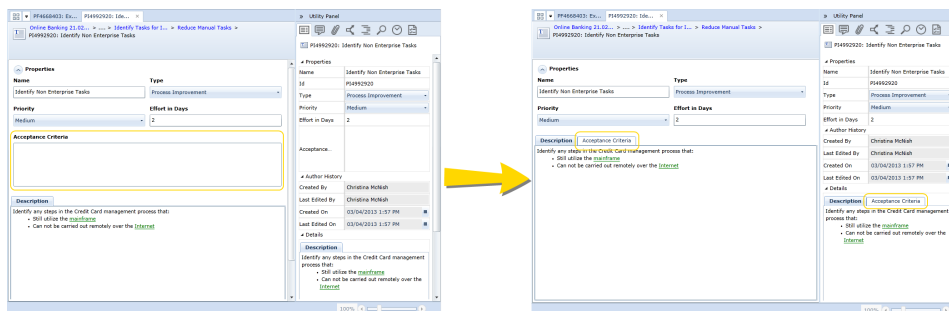
Before you can customize the layout of custom properties, the custom property must already exist. Learn more about [creating custom properties](#).

Example

Jesse, a business analyst, has been storing a lot of business requirement content within an artifact type, *Process Improvement*. There are a large number of text properties associated with the artifact, resulting in an overwhelming page with too much textual information. To improve the organization of her *Process Improvement* business requirements, Jesse displays her custom properties and their content within tabs. As a result, her page is no longer overwhelming, and her content appears in smaller, more digestible chunks.

Tabbed layout

You can lay out your custom properties using tabs as long as the custom properties are multi-line rich-text properties and you place your custom properties under the *Details* group in the *Add/Edit Property* editor.



Property height

One of several layout options you have is altering the height of your custom property. You can make your custom property into a single-line property (fixed height) or a multi-line text property (single, double or triple height setting).

Property width

You can make your custom property into a one-column field or a two-column property. One-column and two-column properties have similar character limits. However, more data can be visually displayed within a two-column property.



By default, all properties have the width of a single standard column. You have the option of extending any single-line, one-column custom property to a two-column width.

Generally, one-column properties are more often used for numeric data whereas two column properties are used for short textual data.

Displaying a custom property in a tabbed layout

To display a custom property in a tabbed layout:

Note: A custom property can only be displayed in a tabbed layout if the custom property is a multi-line and rich-text property.

1. Within the Project Admin, click **Artifact Types**.
The Artifact Type page appears.
2. In the artifact list, click the artifact type that you want to organize into a tabbed layout.
The artifact type details appear on the rightmost side.
3. In the *Properties* section, click **Add Property**.
The *Add/Edit Property* dialog box appears.
4. From the *Property* menu, select your custom property.
5. From the *Group* menu, select **Details** to make your property appear in the bottom section of your artifact type as a tab.
6. Click **OK**.
Within the *Properties* section, your custom property appears in the *Details* group.
7. Click **Save**.
8. Click **Close Project Admin**.
9. To see your changes, click the *menu* button on the ribbon , select *Refresh* and then click **Refresh All**.

After refreshing all, the custom property appears in a tab within the main content area and in the Utility Panel (*Properties* tab, *Details* section) of the artifact type.

Changing the height of a custom property

To change the height of a multi-line custom property:

1. Within the Project Admin, click **Artifact Types**.
The Artifact Type page appears.

2. In the artifact type list, select the artifact type that contains your custom property.
The artifact type details appear on the rightmost side of the page.
3. In the *Properties* section, select your property and then click **Edit Property**.
The Add/Edit Property dialog box appears.
4. From the *Group* menu, select **General**.

Note: Only multi-line properties belonging to the *General* group can be resized.

5. From the *Height* menu, select the height you want.
Single is the smallest multi-line property size whereas triple is the largest property size.
6. Click **OK**.
Your updated property appears in the *Properties* section.
7. Click **Save**.
8. Click **Close Project Admin**.
9. To see your changes, click the *application menu* on the ribbon, select *Refresh* and then click **Refresh All**.

After refreshing all, your custom property appears in a multi-line property within the top area of the artifact type.

Changing the width of a custom property

To change the width of a custom property:

1. Within the Project Admin, click **Artifact Types**.
The Artifact Type page appears.
2. In the artifact list, click the artifact type that you want to display in a two-column property.
The artifact type details appear on the rightmost side.
3. In the *Properties* section, do one of the following:
Click **Add Property** to select your custom property and then, from the *Property* menu, select your property.
--Or--
Select one of the default properties and then click **Edit Property**.
4. From the *Width* menu in the Add/Edit Property dialog box, select **2 Column**.
5. Click **OK**.
Your property appears in the *Properties* section.
6. Click **Save**.
7. Click **Close Project Admin**.
8. To see your changes, click the *application menu* on the ribbon, select *Refresh* and then click **Refresh All**.

After refreshing all, your custom property appears in a two-column property within the main content area of the artifact type.

Managing custom properties

A *custom property* refers to the descriptive data that is associated with an artifact or sub-artifact. All custom properties are created by project administrators for individual projects.

Project administrators with the applicable privileges can create custom properties and apply them to one or more artifact or sub-artifact types. Custom properties are defined and managed on the *Custom Properties* tab in the *Project Administration Console*. The *Properties* tab looks like this:

Name	Property Type	Is Standard
Estimate	Text	☒
Priority	Choice	☒
Request	Text	☒
Stability	Number	☐
UI Exposure	Choice	☐

Properties Details

Name:

Type:

Settings

☐ Required

☐ Allow Custom Value

☐ Allow Multiple Choices

Applies To Artifact Types [Manage Artifact Types](#)

- ☐ Actor
- ☒ Baseline
- ☒ Baseline & Review Folder
- ☐ Business Process Diagram
- ☐ CTest
- ☐ Document
- ☐ Domain Diagram
- ☒ Folder

The left side of the page provides you with a table containing the following columns of information about each custom property:

- **Name:** Indicates the name of the custom property.
- **Type:** The custom property can be one of the following types: *text*, *number*, *date/time*, *choice*, or *user/group*.
- **Is Standard:** Indicates the property exists in all projects across the instance.

Note: Standard properties can only be edited at the instance level by an instance administrator with the [applicable privileges](#).

After you select a custom property from the table, the custom property details are displayed on the right side of the page.

Tip: The option to replace a custom property with a standard property is available to [project administrators with the applicable privileges](#). Replacing a custom property with the standard effectively applies your property to all projects in the instance.

Creating custom properties

You can create custom properties in order to meet the needs of your project.

Single-line properties vs. multi-line text properties

Generally, single-line properties are used for numeric data and multi-line text properties are used to organize larger amounts of textual data.

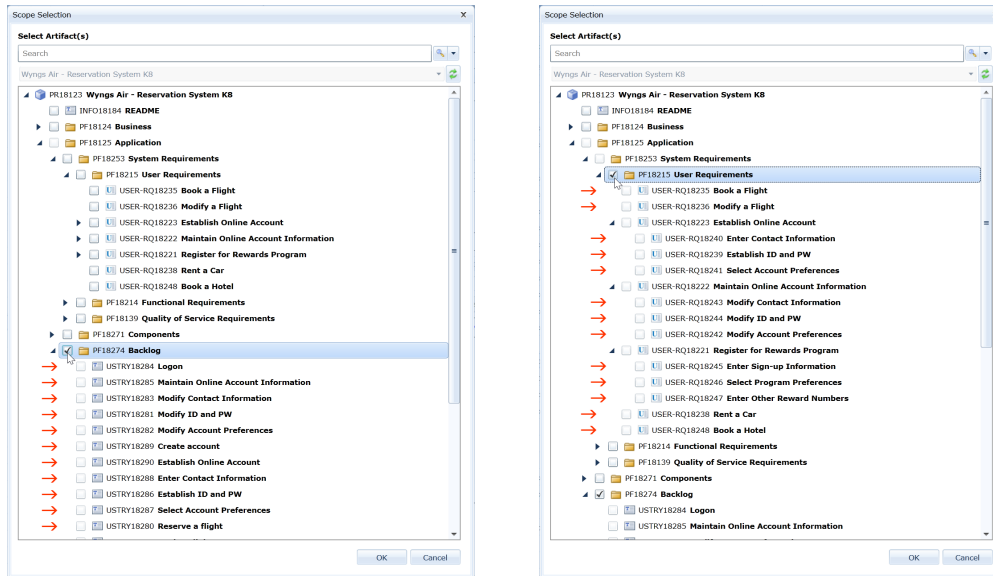
This table demonstrates more differences between single-line properties and multi-line text properties:

Single-line properties	Multi-line text properties
Can contain a limited amount of text	Can hold multiple lines of text
Vertical size cannot be changed	Vertical size can be changed using the <i>Article Types</i> tab in the <i>Project Administration Console</i> (<i>Artifact's Properties</i> section)
Can have a width of one column or two columns	Has a fixed width
Can only appear within the top section of the main content area and the <i>Properties</i> tab	Can only appear within the bottom section of the main content area and the <i>Properties</i> tab
Cannot display your custom property as a tab	Can only display your custom property as a tab

Artifact rank recalculation methods for number properties

When a number property is used to rank artifacts, automatic rank recalculation can optionally be configured. The artifacts that are eligible depend on several property details, including the ranking method.

The End Node method is suitable for projects where work items are organized as child artifacts along the hierarchy branches. When defining the artifact-ranking scope with this method, selecting a folder that contains a flat list of artifacts means all of them are eligible for rank recalculation (below, left); selecting a project folder that contains parent-child relationships, the final artifacts along the hierarchy branches (that is, the end nodes) are eligible (below, right).



To create a new custom property:

1. Open the *Custom Properties* tab.

1. Open the *Project Administration Console*.
2. Click the **Custom Properties** link.
The *Custom Properties* tab is displayed.

2. Click the **New** button on the ribbon.

The new property is created and the details of the property are displayed in the *Properties Details* panel on the right side of the page.

3. Specify the custom property details.

- **Name:** Indicates the name of the custom property.
- **Type:** The custom property can be one of the following types: *text*, *number*, *date/time*, *choice*, or *user/group*.
- **Settings:** The settings options are different depending on the selected **Type**. Here are the associated settings for each **Type**:
 - **Text:**
 - **Required:** Defines whether or not the property is required. If the property is required, artifacts cannot be saved unless a value for this property is specified.
 - **Rich Text:** Defines whether or not the field supports rich text.
 - **Multi Line:** Defines whether or not the field supports multi lines of text.
 - **Has Default Value:** Defines whether or not the property has a default value. If enabled, specify the default value into the space below.
 - **Number**
 - **Required:** Defines whether or not the property is required. If the property is required, artifacts cannot be saved unless a value for this property is specified.
 - **Validated:** Defines whether or not the value specified for this property is validated.
 - **Number of decimal places:** Defines the number of decimal places to save.
 - **Max Value:** Defines the maximum acceptable number. This option is only

applicable if the `Validated` option is enabled.

- `Min Value`: Defines the minimum acceptable number. This option is only applicable if the `Validated` option is enabled.
- `Has Default Value`: Defines whether or not the property has a default value. If enabled, specify the default value into the space below.
- **Date/Time**
 - `Required`: Defines whether or not the property is required. If the property is required, artifacts cannot be saved unless a value for this property is specified.
 - `Validated`: Defines whether or not the value specified for this property is validated.
 - `Max Value`: Defines the latest acceptable date. This option is only applicable if the `Validated` option is enabled.
 - `Min Value`: Defines the earliest acceptable date. This option is only applicable if the `Validated` option is enabled.
 - `Has Default Value`: Defines whether or not the property has a default value. If enabled, specify the default value into the space below.
- **Choice**
 - `Required`: Defines whether or not the property is required. If the property is required, artifacts cannot be saved unless a value for this property is specified.
 - `Allow Custom Value`: Defines whether or not users can specify a custom value for this property.
 - `Allow Multiple Choices`: Defines whether or not users can select more than one choice for this property.
 - `Set Valid Values`: Click this button to add, delete, and reorder the valid choices for this property.
- **User/Group**
 - `Required`: Defines whether or not the property is required. If the property is required, artifacts cannot be saved unless a value for this property is specified.
 - `Has Default Value`: Defines whether or not the property has a default value. If enabled, specify the default value into the space below.
- **Artifact Ranking**: When the property type is set to *number*, *Artifact Ranking* details become available. If the property will be used to rank artifacts, specify these details to enable automatic rank recalculation. Doing so enhances activities such as backlog management: a change to the backlog prompts rank recalculation to ensure there are no duplicate rank values, or missing values in the rank value range.
 - `Ranking method`: Defines which artifacts are eligible for rank recalculation. With the `End Nodes` method, all final child artifacts along branches of a defined parent are eligible.
 - `Max number of artifacts to rank`: Defines the maximum number of eligible artifacts that are part of rank recalculation. This value works in conjunction with **Min Value** and **Max Value** in *Settings*, which set the numerical boundaries of rank values (the upper boundary typically being the maximum number of artifacts a manager may be ranking). The maximum number of eligible artifacts can match the total of the rank value range ($\text{Max Value} - \text{Min Value} + 1$), or can be a subset of it (for example, the first 25 of 100 possible rank values).

- **Scope:** Defines which parts of the project are eligible for rank recalculation. Specifically with the `End Nodes` method, defining the scope indicates the parents whose final child artifacts are eligible for rank recalculation.

In addition to its type being set to *number*, for rank recalculation to be enabled, the property's *Settings* details must have the following specifications:

- the property is not required
 - it is validated
 - its value has no decimal places
 - it has a minimum value of 1 or greater
 - its maximum value is greater than or equal to the maximum number of artifacts whose rank is automatically recalculated
 - it does not have a default value
- **Applies To Artifact Types:** Place a check mark beside the artifact types that should contain this property. Click the **Manage Artifact Types** link to add or manage artifact types.
4. Click **Save**.

Modifying custom properties

Warning: Modifying a custom property can result in lost data. For example, if you change the property type, the current data is lost. Additionally, if you remove the custom property from one or more artifact types, the custom property data is lost for those types of artifact.

To modify an existing custom property:

1. Open the *Properties* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Custom Properties** link.

The *Custom Properties* tab is displayed.
2. Select the custom property you want to modify.

Select a property by clicking a row in the table. The property details are displayed on the right side of the page.

BP Air - Rewards P... Custom Properties x

Drag a column header and drop it here to group by that column

Name	Property Type	Is Standard
Estimate	Text	☒
Priority	Choice	☐
Request	Text	☒
Stability	Number	☐
UI Exposure	Choice	☐

Properties Details

Name:

Type:

Settings

☐ Required

☐ Allow Custom Value

☐ Allow Multiple Choices

Applies To Artifact Types [Manage Artifact Types](#)

☐ Actor

☒ Baseline

☒ Baseline & Review Folder

☐ Business Process Diagram

☐ CTest

☐ Document

☐ Domain Diagram

☒ Folder

☐ Generic Diagram

3. Update the custom property details.

- **Name:** Indicates the name of the custom property.
- **Type:** The custom property can be one of the following types: *text*, *number*, *date/time*, *choice*, or *user/group*.
- **Settings:** The settings options are different depending on the selected Type. Here are the associated settings for each Type:
 - **Text:**
 - **Required:** Defines whether or not the property is required. If the property is required, artifacts cannot be saved unless a value for this property is specified.
 - **Rich Text:** Defines whether or not the field supports rich text.
 - **Multi Line:** Defines whether or not the field supports multi lines of text.
 - **Has Default Value:** Defines whether or not the property has a default value. If enabled, specify the default value into the space below.
 - **Number**
 - **Required:** Defines whether or not the property is required. If the property is required, artifacts cannot be saved unless a value for this property is specified.
 - **Validated:** Defines whether or not the value specified for this property is validated.
 - **Number of decimal places:** Defines the number of decimal places to save.
 - **Max Value:** Defines the maximum acceptable number. This option is only applicable if the Validated option is enabled.
 - **Min Value:** Defines the minimum acceptable number. This option is only applicable if the Validated option is enabled.
 - **Has Default Value:** Defines whether or not the property has a default value. If enabled, specify the default value into the space below.
 - **Date/Time**
 - **Required:** Defines whether or not the property is required. If the property is required, artifacts cannot be saved unless a value for this property is specified.
 - **Validated:** Defines whether or not the value specified for this property is validated.
 - **Max Value:** Defines the latest acceptable date. This option is only applicable if the Validated option is enabled.

- **Min Value:** Defines the earliest acceptable date. This option is only applicable if the **Validated** option is enabled.
- **Has Default Value:** Defines whether or not the property has a default value. If enabled, specify the default value into the space below.
- **Choice**
 - **Required:** Defines whether or not the property is required. If the property is required, artifacts cannot be saved unless a value for this property is specified.
 - **Allow Custom Value:** Defines whether or not users can specify a custom value for this property.
 - **Allow Multiple Choices:** Defines whether or not users can select more than one choice for this property.
 - **Set Valid Values:** Click this button to add, delete, and reorder the valid choices for this property.
- **User/Group**
 - **Required:** Defines whether or not the property is required. If the property is required, artifacts cannot be saved unless a value for this property is specified.
 - **Has Default Value:** Defines whether or not the property has a default value. If enabled, specify the default value into the space below.
- **Artifact Ranking:** When the property type is set to *number*, *Artifact Ranking* details become available. If the property will be used to rank artifacts, specify these details to enable automatic rank recalculation. Doing so enhances activities such as backlog management: a change to the backlog prompts rank recalculation to ensure there are no duplicate rank values, or missing values in the rank value range.
 - **Ranking method:** Defines which artifacts are eligible for rank recalculation. With the **End Nodes** method, all final child artifacts along branches of a defined parent are eligible.
 - **Max number of artifacts to rank:** Defines the maximum number of eligible artifacts that are part of rank recalculation. This value works in conjunction with **Min Value** and **Max Value** in *Settings*, which set the numerical boundaries of rank values (the upper boundary typically being the maximum number of artifacts a manager may be ranking). The maximum number of eligible artifacts can match the total of the rank value range (Max Value - Min Value + 1), or can be a subset of it (for example, the first 25 of 100 possible rank values).
 - **Scope:** Defines which parts of the project are eligible for rank recalculation. Specifically with the **End Nodes** method, defining the scope indicates the parents whose final child artifacts are eligible for rank recalculation.

In addition to its type being set to *number*, for rank recalculation to be enabled, the property's *Settings* details must have the following specifications:

- the property is not required
- it is validated
- its value has no decimal places
- it has a minimum value of 1 or greater
- its maximum value is greater than or equal to the maximum number of artifacts whose rank is automatically recalculated
- it does not have a default value
- **Applies To Artifact Types:** Place a check mark beside the artifact types that should contain this property. Click the **Manage Artifact Types** link to add or manage artifact types.

4. Click **Save**.

Deleting custom properties

To delete a custom property:

Warning: Deleting a custom property results in data lost. The custom property data is lost for all artifacts if the custom property is deleted.

1. Open the *Properties* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Custom Properties** link.
The *Custom Properties* tab is displayed.
2. Click the **Delete** button on the ribbon.
The confirmation dialog appears.
3. Click **OK** to confirm the deletion.

Associating custom properties with sub-artifacts

Blueprint allows project administrators with the correct privileges to associate custom properties with sub-artifacts (such as shapes, connectors, glossary terms, and so on). This allows you to associate various types of data with sub-artifacts in the system. You can also control the order in which the properties are displayed so it is easier to view the information in the utility panel.

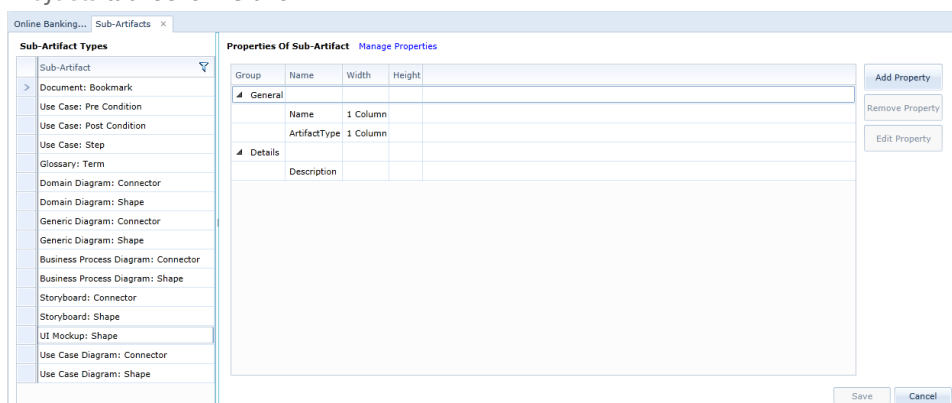
Example

Fred manages the glossary artifacts in Blueprint. The company has started developing the next version of the product, and some of the terms are no longer applicable.

Fred decides to create a custom property called Version and associate the custom property with the Glossary Term sub-artifact type.

Now, Fred can set the version on each artifact type so there is no confusion about whether or not the term is applicable to the new product.

Custom properties are added to sub-artifacts on the *Sub Artifacts* tab in the *Project Administration Console*. The *Sub Artifacts* tab looks like this:



Note: Blueprint consists of a predefined set of sub-artifact types. You cannot create custom sub-artifact types.

Adding a custom property to a sub-artifact

You can add any custom property to any of the predefined sub-artifacts in Blueprint.

To add a custom property to a sub-artifact:

1. Open the *Sub Artifacts* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Sub Artifacts** link.
The *Sub Artifacts* tab is displayed.
2. Select a sub-artifact.
To select a sub-artifact, click a row in the table on the left side of the screen. The custom properties are displayed on the right side of the page.
3. Place a checkmark beside the custom properties that you want to associate with the sub artifact.

Tip: You can control the order in which the custom properties are displayed in the main experience by selecting a property and clicking the **Up** and **Down** buttons.

You can click the **Manage Properties** link to [add or manage custom properties](#).

4. Click **Save**.

Removing a custom property from a sub-artifact

Warning: Removing a custom property from a sub-artifact results in data loss! If you remove a custom property from a sub-artifact, all data stored for that particular custom property is lost.

To remove a custom property from a sub-artifact:

1. Open the *Sub Artifacts* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Sub Artifacts** link.
The *Sub Artifacts* tab is displayed.
2. Select a sub-artifact.
To select a sub-artifact, click a row in the table on the left side of the screen. The custom properties are displayed on the right side of the page.
3. Remove the checkmark beside the custom properties that you no longer want to associate with the sub artifact.
4. Click **Save**.

Replacing a custom property with the standard

Overview

Caution: Replacing a custom property with the standard is not reversible and could result in data loss. If possible, make backups of your data before performing this operation.

Blueprint allows you to replace custom properties with standard properties in order to maintain a data standard across projects. Standardization effectively reduces the effort involved in updating data from multiple projects. Only Instance Administrators with the applicable privileges can securely configure standard properties.

When you replace a custom property, you are prompted to select a standard property to take its place. Any artifact types you have selected for the custom property replace any artifact types associated with the selected standard property.

In the Project Administration Console, you can easily replace a custom property with the standard by selecting it in the *Custom Properties* list, right-clicking it and then clicking **Replace with Standard**.

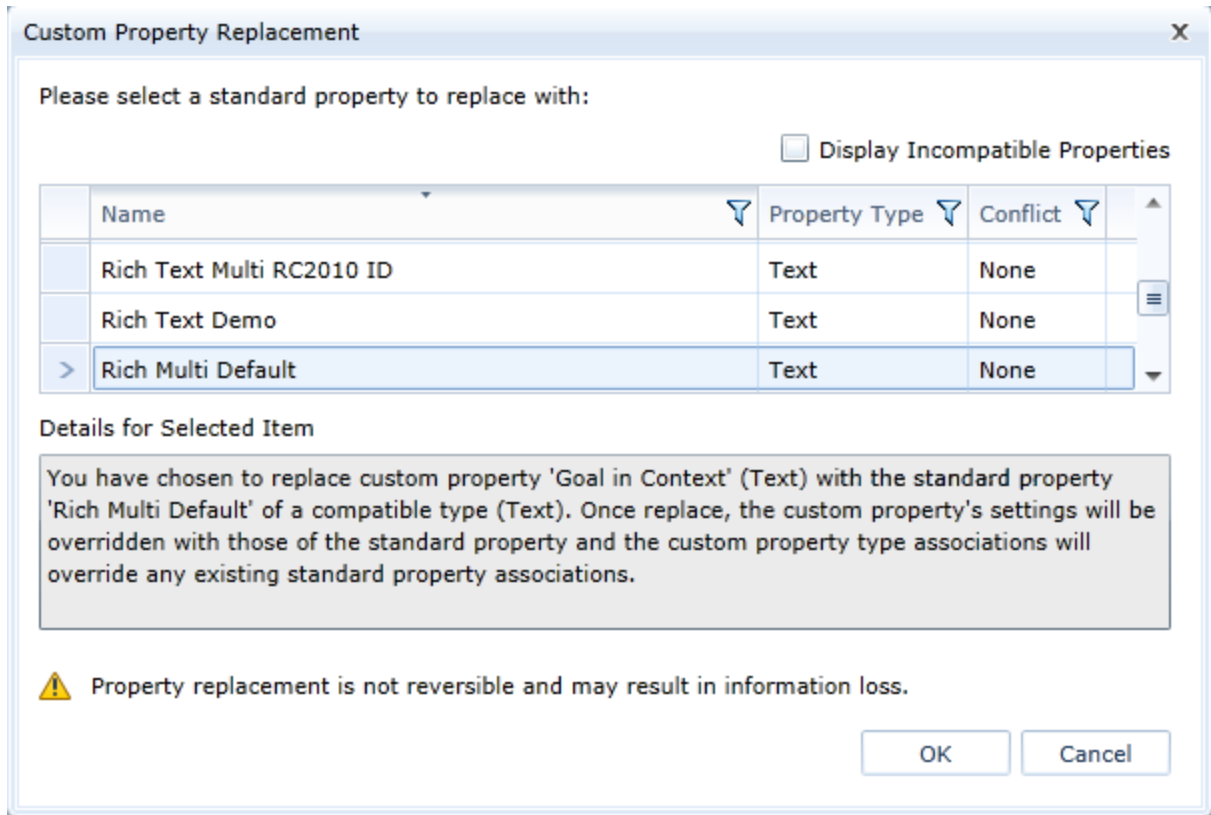
BP Air (Latest Ver... Custom Properties x			
Drag a column header and drop it here to group by that column			
Name	Property Type	Is Standard	
Goal in Context	Text	☐	New
Scope	Text	☐	Delete
Trigger	Text	☐	Replace with Standard
Overview	Text	☐	

Tip: We recommend establishing standard properties early on, avoiding the need to standardize custom properties later on.

To replace a custom property with a standard property:

1. Open the *Project Administration Console*.
2. Click **Custom Properties** (*Customize Project* section).
The *Custom Properties* tab appears.
3. Select the custom property and then select **Replace with Standard** from the **More Actions** menu (*Actions* group).
The *Custom Property Replacement* dialog appears.
4. Select a standard property in the list.
To see more properties, you can select the **Display Incompatible Properties** check box.

Caution: Selecting an incompatible standard property could result in data loss.



5. Click **OK**.

The custom property has been successfully replaced with the standard property you selected.

Managing status values

Blueprint allows [project administrators with the correct privileges](#) to add additional discussion status values and approval status values. Custom status values offer flexibility in the way you manage comments and approvals.

Example

Noah, a business analyst, sometimes finds it challenging to get stakeholders to sign off on artifacts. Some of his reviewers do not feel comfortable approving the artifacts until after a few specific changes are made.

In order to simplify the sign off process, Noah creates a new approval status value called **Approved with Conditions**. Now, reviewers can simply add a comment to the artifact to describe the conditions, and then set the approval status to **Approved with Conditions**.

Status values are defined and managed using the *Status Values* tab in the *Project Administration Console*. The *Status Values* tab looks like this:

Default status values

The following discussion status values exist by default:

- **Open:** Indicates the discussion status is open. When a discussion is open, users can reply to comments in the discussion.
- **Closed:** Indicates the discussion status is closed. When a discussion is closed, users can no longer reply to comments in the discussion.

The following approval status values exist by default:

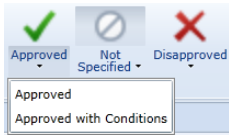
- **Not Specified:** Indicates the review participant has not approved or disapproved the artifact. This is the default approval status value. After a review participant has approved or disapproved an artifact, the reviewer can still change the status back to Not Specified.
- **Approved:** Indicates the review participant has approved the artifact.
- **Disapproved:** Indicates the review participant has disapproved the artifact.

Note: You cannot modify or delete the default status values.

Creating a new approval status value

Each custom approval status must be set to one of the following types: *Approved*, *Disapproved*, or *Not Specified*. You cannot add additional types, but you can create multiple status values and associate them with the existing types.

After you create a new approval status value, the new status appears in the appropriate drop-down in the *Reviewers Experience*. For example, the image below displays the **Approved** drop-down options that appear in the *Reviewers Experience* after a new status (named **Approved with Conditions**) was added:



To create a new approval status value:

1. Open the *Status Values* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Status Values** link.

The *Status Values* tab is displayed.
2. Click the **New** button on the ribbon and select **New Approval Status**.

The new approval status appears as a new row in the table.
3. Specify a name for the new approval status.

The specified name appears as a new drop-down option under one of the following buttons in the *Reviewers Experience*: **Approved**, **Disapproved**, or **Not Specified**.
4. Specify whether this new status indicates the artifact is approved, disapproved, or not specified.

This setting controls whether the new status value appears under the **Approved**, **Disapproved**, or **Not Specified** drop-down option on the ribbon in the *Reviewers Experience*

Creating a new discussion status value

You can create many discussion status values, but each one must mark the discussion as either open or closed.

Example

Project administrators may want to create a discussion status for discussions that are either *accepted* or *rejected*. Accepted discussions will likely remain open until the changes are implemented. Rejected discussions will likely close the discussion.

To create a new discussion status value:

1. Open the *Status Values* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Status Values** link.

The *Status Values* tab is displayed.
2. Click the **New** button on the ribbon and select **New Status**.

The new discussion status appears as a new row in the table.
3. Specify a name for the new discussion status.

This is the name that will appear as a new drop-down option located beside each discussion in the utility panel.
4. Place a checkmark in the *Close Discussion* column if you want the new discussion status to close the

discussion.

Note: After a discussion is closed, users can no longer reply to the comments in the discussion.

Deleting a status value

If you delete an approval status value, any artifacts that are associated with that approval status are automatically updated with the *Not Specified* status value.

If you delete a discussion status value, existing discussions continue to be associated with the deleted status. However, the deleted status value is no longer displayed as an option in the drop-down list.

To delete a status value:

1. Open the *Status Values* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Status Values** link.

The *Status Values* tab is displayed.
2. Select the status value that you want to delete.
3. Click the **Delete** button on the ribbon.

Configuring project details

[Project administrators with the correct privileges](#) can use *Project Details* tab to change project details such as the project description.

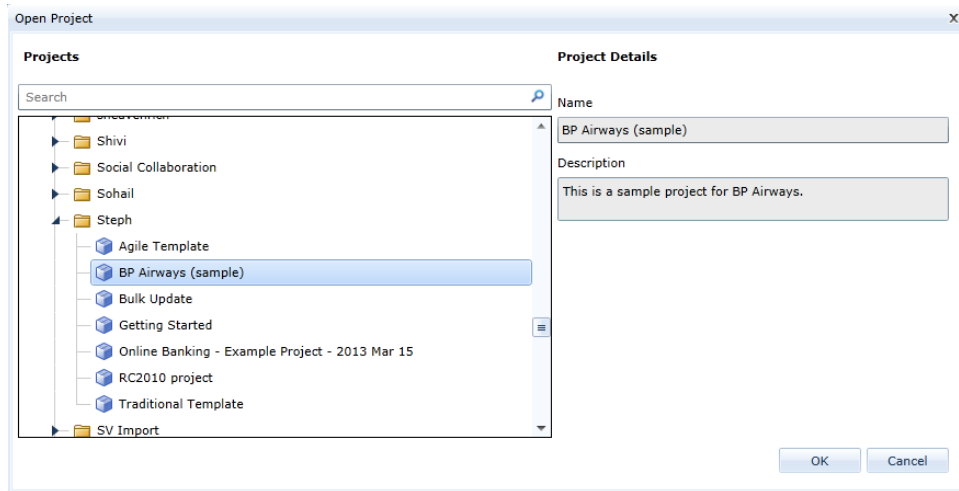
The *Project Details* tab looks like this:

The screenshot shows the 'Project Details' tab in a web application. At the top, there are two tabs: 'Online Banking ...' and 'Project Details x'. Below the tabs, the 'Project Details' section contains several input fields: 'Name' with the value 'Online Banking', 'Description' with the value 'This is the online banking project.', and 'Location' with the value '/Raptor/Steph/'. Below these fields, there is a section titled 'Extract Project XML Data' with a blue 'Open' link. At the bottom right, there are 'Save' and 'Cancel' buttons. At the very bottom, there is a progress bar showing 100% completion.

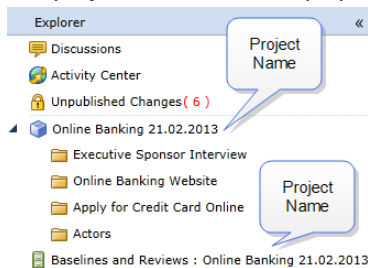
Changing the project name

Note: Project administrators cannot change the project name. You must be an Instance Administrator with the correct privileges to modify the project name.

The project name is displayed in the *Open Project* dialog when a user opens the project:



The project name is also displayed in the explorer panel after the project is open:



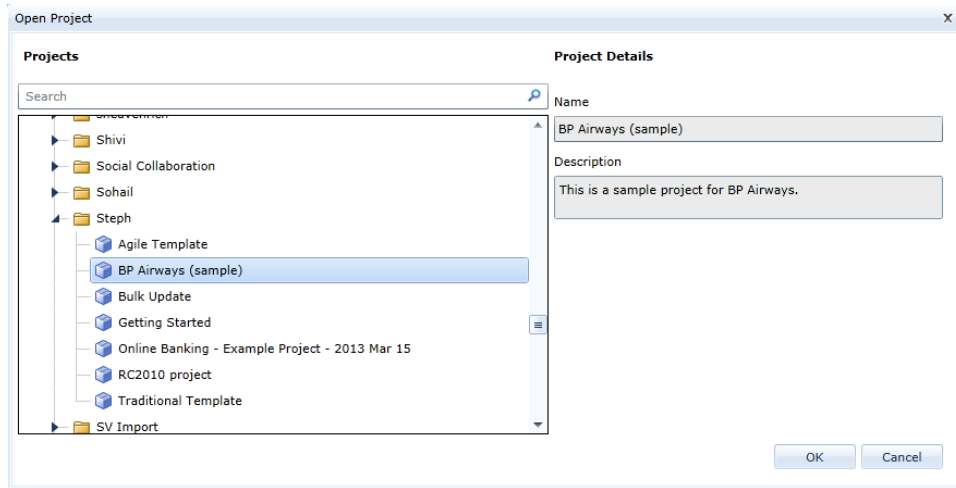
To change the project name:

1. Open the *Project Details* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Project Details** link.
The *Project Details* tab is displayed.
2. Set the name of the project.
Type the project name into the *Name* field.
3. Click the **Save** button to save the project details.

Note: If you change the project name, users must close the project and re-open the project with the new name. The project name does not automatically refresh for users who have already opened the project.

Changing the project description

The project description is displayed in the *Open Project* dialog when a user opens the project:



1. Open the *Project Details* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Project Details** link.
The *Project Details* tab is displayed.
2. Set the project description.
Type the project description into the *Description* field.
3. Click the **Save** button to save the project details.

Changing the project location

Note: Project administrators cannot change the project location. You must be an [Instance Administrator](#) with the [correct privileges](#) to modify the project name.

To change the project location:

1. Open the *Project Details* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Project Details** link.
The *Project Details* tab is displayed.
2. Set the project location.
3. Click the **Save** button to save the project details.

Downloading project XML data

Blueprint provides you with the ability to download your projects in XML format. This file can be used to simplify the authoring of office document templates.

To download the project XML data:

1. Open the *Project Details* tab.
 1. Open the *Project Administration Console*.
 2. Click the **Project Details** link.
The *Project Details* tab is displayed.

Note: If you are using Internet Explorer 8, you must enable the *automatic prompting for file downloads* security setting before you can download the file from Blueprint. To enable this setting, click **Tools > Internet Options > Security > Custom level... > Downloads** and then enable the **Automatic prompting for file downloads** option.

2. Click the **Open** link to view or download the project data in XML format.
The **Open** link is located under the *Extract Project XML Data* heading.

Managing project-level office document templates

Office document templates can be added at the project level. Once added, users can generate office documents using the data stored in Blueprint artifacts.

Note: Office document templates can also be added at the instance level by an instance administrator with the correct privileges.

Here are the typical sequence of events:

1. Project administrator authors a new template
2. Project administrator adds the template to Blueprint
3. Users generate documents using the templates

Adding an office document template to a project

After you add an office document template, users can generate documents.

To add a new document template:

1. Open the *Office Document Templates* tab.
 1. Open the *Project Administration Console*.
 2. Click **Office > Document Templates** on the ribbon (*Project Admin* tab, *Project* group).
2. Click the **New** button on the ribbon (*Project Admin* tab, *Actions* group).
3. Configure the settings for the new template:

- **Include Files:** If selected, the generated document is packaged in a **.zip** file with the documents and attachments.
- **Rich Text Formatting:** If selected, any rich text formatting in Blueprint is preserved in the generated document. You can also select the percentage you want to scale font size for rich text fields in the generated document.
- **Include Open Discussions:** If selected, open discussions are included in the generated document.
- **Include Closed Discussions:** If selected, closed discussions are included in the generated document.
- **Attach source data to report output:** If selected, the generated document is packaged in a **.zip** file with the project XML data that was used to generate the document.

The project XML data can be useful if:

- you want to author a template using data and image references from your project.
 - you are debugging a problem with the template you are using
 - you want to provide Blueprint support with the project XML data that generated the template
4. Upload the office document template that you created.
 1. Click the **Upload** link.
 2. Locate the file that you want to upload.
 3. Click **Open**.
 5. Click **Save**.

Users can now select this template when they generate office documents.

Managing ALM targets and security

[Project administrators with the applicable privileges](#) can configure ALM targets so users can export Blueprint artifacts to other Application Lifecycle Management (ALM) systems.

[Project administrators with the applicable privileges](#) can set the ALM security settings to control which users have access to ALM targets.

When users are performing an ALM Export or generate a Test Plan, they can choose from a pre-populated list of ALM Targets. The ALM Targets that appear in the list is different for each user, depending on whether they have access to the targets. ALM Security allows project administrators to control which ALM Targets appear for each user.

Supported ALM Systems

Note: Integration with the following versions of HP ALM is only available if the HP legacy 32-bit connector has been installed.

Blueprint supports integration with the following ALM systems:

- HP ALM 11

Note: The Blueprint REST API does not support HP ALM version 11. Native support for HP ALM 11 is available through the COM library and CloudConnect.

- HP ALM 11.5
- HP ALM 11.52
- HP ALM 12
- Microsoft Team Foundation Server 2010
- Microsoft Team Foundation Server 2012
- Microsoft Team Foundation Server 2013

Creating ALM targets

ALM targets provide a connection between Blueprint and your ALM system, allowing you to export artifact information and generated tests to your ALM system.

Note: Integration with the following versions of HP ALM is only available if the HP legacy 32-bit connector has been installed.

Blueprint supports integration with the following ALM systems:

- HP ALM 11

Note: The Blueprint REST API does not support HP ALM version 11. Native support for HP ALM 11 is available through the COM library and CloudConnect.

- HP ALM 11.5
- HP ALM 11.52
- HP ALM 12
- Microsoft Team Foundation Server 2010
- Microsoft Team Foundation Server 2012
- Microsoft Team Foundation Server 2013

Note: By default, only [project administrators and instance administrators with the correct privileges](#) can access new ALM targets. After you create a new target, you must [set the target security to grant access to the ALM target](#) so other users can use it.

Tip: Blueprint allows you to create new (empty) targets, or you can create targets based on existing targets in another project.

To create a new ALM target:

1. Open the *ALM Targets* tab.
 1. Open the *Project Administration Console*.
 2. Click **ALM > ALM Targets** on the ribbon (*Project Admin* tab, *Project* group).
2. Click the **New** button on the ribbon (*Project Admin* tab, *Actions* group) and then select one of the following options:
 - **HP ALM-COM**: Creates a new target connecting Blueprint to HP ALM versions 11 and later.
 - **HP ALM-REST**: Creates a new target that allows you to connect Blueprint to HP ALM versions 11.5 and later using the Blueprint REST API.
 - **TFS Target**: Creates a new TFS target.
 - **From Existing Project**: Creates a new ALM target based on an existing target in another project. If you select this option, you must choose a specific target from another project.

either or .

A new ALM Target is added. The details appear on the rightmost side of the screen.

3. Type a **Name** for the new target.
4. Set the target **Location**:
 1. Click the  button. The *ALM Connection Editor* dialog appears.
 2. Type the **URL** of the ALM server (example: `http://bps-alm10:8080/almbin` or `http://vmdev:8080/tfs`)

Note: If you are accessing the ALM server from the Blueprint Cloud, ensure that you specify the external IP address (instead of the internal IP).

3. Specify a valid **User Name**.
4. Specify a valid **Password**.
5. Click the **Connect** button.

If you are creating an HP ALM Target, the **Connect** button pre-populates the **Domain** and **Project** fields with valid options.

If you are creating a TFS Target, the **Connect** button pre-populates the **Team Project Collection** and **Team Project** fields with valid options.

6. Perform one of the following actions:
 - If you are creating an HP ALM Target:
 - Select the appropriate **Domain** and **Project**
 - Select your desired behavior for deleted artifacts:
 - **How do you want Blueprint to handle artifacts that are deleted when exporting to HP ALM?**: There are two options:
 - **Flag them only (via 'Blueprint Deleted')**: This option sets the **Blueprint Deleted** field to **Y** in your ALM system if items are deleted in Blueprint. In other words, artifacts are not deleted in your ALM system even if they are deleted in Blueprint.

Note: This option requires that you have a **Blueprint Deleted** field configured in your ALM system. For more information, refer to the section titled 'Configuring the Blueprint Deleted field in your ALM system'.

- **Delete them:** This option deletes artifacts in your ALM system when artifacts are deleted in Blueprint and the changes are exported to the ALM system.

- If you are creating a TFS Target:

- Select the appropriate **Team Project Collection** and **Team Project**

7. Click **OK**.

5. Configure your target options by clicking the **Target Options** button.

The following options are available for HP ALM Targets:

- **How do you want Blueprint to handle artifacts that are deleted when exporting to HP ALM?:**

There are two options:

- **Flag them only (via 'Blueprint Deleted'):** This option sets the **Blueprint Deleted** field to **Y** in your ALM system if items are deleted in Blueprint. In other words, artifacts are not deleted in your ALM system even if they are deleted in Blueprint.

Note: This option requires that you have a **Blueprint Deleted** field configured in your ALM system. For more information, refer to the section titled 'Configuring the Blueprint Deleted field in your ALM system'.

- **Delete them:** This option deletes artifacts in your ALM system when artifacts are deleted in Blueprint and the changes are exported to the ALM system.
- **Do you want Blueprint to create a hyperlink for each Blueprint relationship so you can easily access related Blueprint artifacts from the ALM system?:** If enabled, each exported artifact will contain a hyperlink to each related artifact in Blueprint. If disabled, the exported artifacts will still contain a hyperlink back to the artifact in Blueprint, but will not contain hyperlinks to related artifacts.
- **Do you want Blueprint to export the full artifact hierarchy from the root level?:** If enabled, Blueprint exports all folders needed to show the artifact hierarchy from the root level to each exported artifact.
- **Do you want the Change Summary to only report conflicts related to artifacts that are being exported to the ALM system?:** If enabled, conflicts are only reported if you are exporting that particular artifact to the ALM system.
- **Do you want Blueprint to maintain the Blueprint hierarchy of artifacts after exporting to HP ALM?:** If enabled, Blueprint exports artifacts without impacting a modified artifact hierarchy in ALM. In other words, you can move or alter the hierarchy of artifacts in ALM and maintain that structure after re-exporting the artifacts from Blueprint. This feature allows you to maintain a custom structure in ALM and still take advantage of Blueprint's ability to export artifact changes.

- **Do you want to export text fields with Rich Text formatting?:** If enabled, Blueprint exports text fields with full rich text formatting. If this option is not enabled, Blueprint exports plain text only.
- **What would you like the "Export Path" set to by default in the Export Wizard?:** Allows you to make the export easier for users by setting a default export path. If the user does not explicitly set an export path, this default will be used for the export.

The following options are available for TFS Targets:

- **Do you want Blueprint to create a hyperlink for each Blueprint relationship so you can easily access related Blueprint artifacts from the ALM system?:** If enabled, each exported artifact will contain a hyperlink to each related artifact in Blueprint. If disabled, the exported artifacts will still contain a hyperlink back to the artifact in Blueprint, but will not contain hyperlinks to related artifacts.
- **Do you want Blueprint to export the full artifact hierarchy from the root level?:** If enabled, Blueprint exports all folders needed to show the artifact hierarchy from the root level to each exported artifact.
- **Do you want the Change Summary to only report conflicts related to artifacts that are being exported to the ALM system?:** If enabled, conflicts are only reported if you are exporting that particular artifact to the ALM system.
- **Do you want to export text fields with Rich Text formatting?:** If enabled, Blueprint exports text fields with full rich text formatting. If this option is not enabled, Blueprint exports plain text only.
- **What would you like the "Area Path" set to by default in the Export Wizard?:** Allows you to make the export easier for users by setting a default area path. If the user does not explicitly set an area path, this default will be used for the export.

6. Configure the mapping details:

The mapping details allow you map each artifact type to a data field in your ALM system.

1. For each *Artifact Type*, click the drop-down in the *External Type* column and select a data type.

Tip: If the 🚫 icon appears, there is a conflict you must resolve. Resolve the issue and click the **Validate Target** button to re-validate your settings.

2. For each *Artifact Type*, click the **Edit...** button and configure the property mappings on the ALM Field Mapping Editor dialog.

The ALM properties are displayed on rightmost side. Using the drop-down options, map each Blueprint property (on the left) to an ALM property (on the right).

Note: You can map the same Blueprint properties to multiple ALM properties.

Below are the high-level mapping rules for Blueprint to HP ALM:

		HP QC Types				
		String	Number	DateTime	List	Group List
Blueprint Types	String		(1)		(2)	
	Number				(2)	
	DateTime				(2)	
	Choice		(1)		(2)	
	User/Group		(1)		(2)	

(1) Will only work if string converts to the underlying data type.

(2) When value checking is turned on in QC, export will only succeed if the value is in the QC list.

Below are the high-level mapping rules for Blueprint to TFS:

		TFS Types						
		String	Integer	Double	DateTime	PlainText	Html	TreePath
Blueprint Types	String		(1)	(1)				(2)
	Number							
	DateTime							
	Choice		(1)	(1)				(2)
	User/Group		(1)	(1)				

(1) Will only work if string converts to underlying data type.

(2) Will only work if value is in list of TFS values.

3. When you are finished, click **OK** to close the dialog.

7. Click **Save**.

You may want to consider [setting up the target security](#) to control which users have access to export to the new target.

Granting access to an ALM target

Project administrators with the applicable privileges can control security by granting access to an ALM target for an individual user or an entire group.

Note: Only users that have author licenses can push requirements to the ALM target after access has been granted.

To grant access to an ALM target:

1. Open the *ALM Security* tab.
 1. Open the *Project Administration Console*.
 2. Click **ALM > ALM Security** on the ribbon (*Project Admin* tab, *Project group*).
2. Click the target (on the left side) for which you want to configure security.
The users and groups that have access to the target are displayed on the right side of the screen.
3. Click the **Add** button.
The Select Identity dialog appears.
4. Select the users and/or groups that you want to grant access to, and then click **OK**.
Click the *Users* and *Group* tabs to toggle between the list of users and groups.

Tip: You can select multiple users and/or groups by holding the **Ctrl** key and clicking multiple users and groups. You can also click **Ctrl-A** to select all.

5. Click **Save**.

The users and groups now appear in the table, and therefore have access to the ALM target.

Revoking access from an ALM target

To revoke access from an ALM target:

1. Open the *ALM Security* tab.
 1. Open the *Project Administration Console*.
 2. Click **ALM > ALM Security** on the ribbon (*Project Admin* tab, *Project group*).
2. Click the target (on the left side) for which you want to configure security.

The users and groups that have access to the target are displayed on the right side of the screen.
3. Click the users and/or groups that you want to revoke access from.

Tip: You can select multiple users and/or groups by holding the **Ctrl** key and clicking multiple users and groups. You can also click **Ctrl-A** to select all.

4. Click **Remove**.
5. Click **Save**.

After saving, the table reflects the users and groups that have access to export to the ALM target.

Configuring the commenting settings

Comments allow multiple stakeholders to collaborate on requirements. Blueprint users or e-mail collaborators can add comments to any artifact or sub-artifact, including (but not limited to) textual requirements, use cases, actors, use case steps, diagrams, shapes in diagrams, glossaries, and glossary terms.

As a [project administrator with the appropriate privileges](#), you can control whether or not users can modify and/or delete their published comments.

To change the comment settings:

1. Open the *Project Administration Console*.
2. Click the **Project Settings** button on the ribbon.
3. Select or clear the following options depending on your preferences:
 - **Allow modification of published comments and replies**

Select this option if you want users to have the ability to modify their own comments and replies, even after publication.
 - **Allow deletion of published comments and replies**

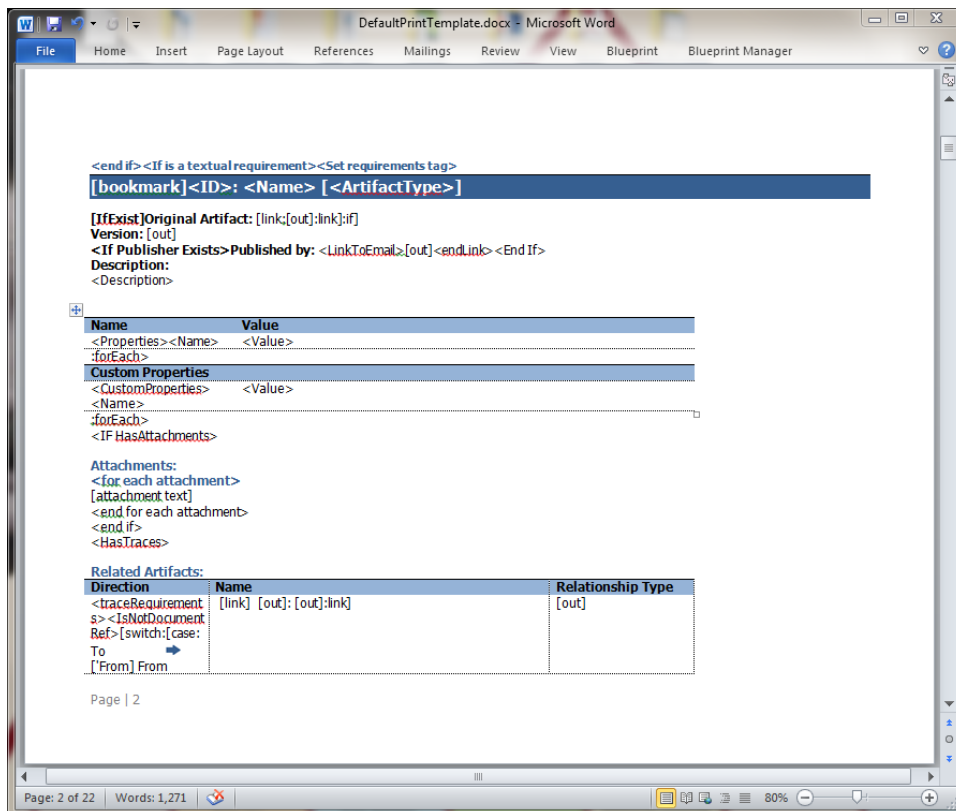
Select this option if you want users to have the ability to delete their own comments and replies.

4. Click **Save**.

Modifying the default print template at the project level

Blueprint provides [project administrators that have the applicable privileges](#) with a default Word template for the purpose of exporting and printing artifacts.

The template is written and designed using the document template authoring add-in.



We do not recommend making changes to the template directly unless you have document template authoring experience. For more information about document template authoring, see the [Document Template Authoring Help](#).

Note: The default print template can be changed at two different levels of administration privileges. Instance administrators with the applicable privileges can modify the default print template within the *Instance Administration Console*, setting a new default template for all projects. Both instance administrators and project administrators with the applicable privileges can change the default print template within the *Project Administration Console*, which sets a new print template for that individual project only.

Once you change the print template at the project level, changes to the template at the instance level do not override the project level template.

To modify the default print template:

1. Open the *Project Administration Console*.
2. Click the *Project Print Template* link.

Important: To restore the system default document template later on, it is a good idea to click the **Download** link to save a copy of the default document template locally. When you want to restore the system default document template, you can simply click the **Replace** link to upload it. If you do not save a copy of the system default document template and you use the **Restore** operation, you will restore the latest document template that has been uploaded by the instance administrator.

3. Create a new template or modify an existing document template.
If you want to modify the existing template, click the **Download** link.

Note: If you are using Internet Explorer 8, you must enable the *automatic prompting for file downloads* security setting before you can download the file from Blueprint. To enable this setting, click **Tools > Internet Options > Security > Custom level... > Downloads** and then enable the **Automatic prompting for file downloads** option.

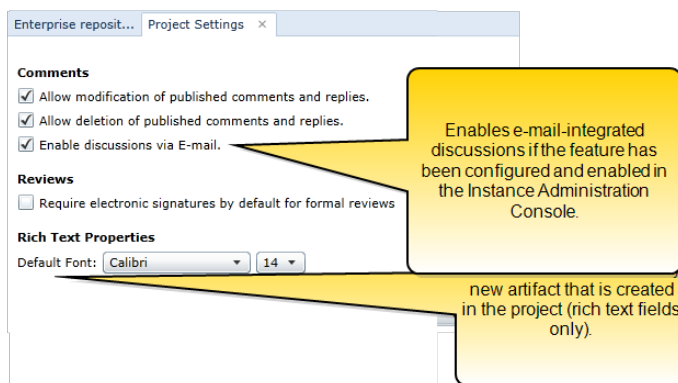
If you want to change the scale of rich text font size to improve print quality, you can select a different percentage.

4. Click the **Replace** link.
The *save* dialog box appears.
5. Select your new print template and then click **Open**.
6. Click **Save**.

Your new print template is saved. Whenever you click the **Print to PDF** button or the **Print to Word** button on the ribbon (*Home* tab), your print template is used to export an artifact to a file for printing purposes.

Configuring project settings

You can change the project settings on the *Project Settings* tab in the *Project Administration Console*. The *Project Settings* tab looks like this:



The following features are configured at the project level:

- **Comments:** Affect artifact discussions and commenting. Email discussions are enabled and configured in the *Instance Administration Console*.

- **Reviews:** Add security features to the formal review process.
- **Rich Text Properties:** Set the default font in rich text fields for a new artifact that is created in the project.

Configuring Electronic Signature Settings for Reviews

When approvers are taking part in a formal review, and approve or disapprove an artifact, they can be required to enter their password as a means of providing an electronic signature. Additionally, the meaning of the signature can automatically be appended to the signature manifestation.

Electronic Signatures

Selecting the **Require electronic signatures by default for formal reviews** checkbox in the *Project Settings* tab means the **Require electronic signatures for formal reviews** checkbox will be selected by default when users begin creating a formal review.

The screenshot shows the 'Baselines and Reviews : BP Airways' interface. The 'Properties' tab is active, displaying fields for 'Name' (Release 2.0 Review), 'End Date' (EnterDate), 'Review Type' (Formal), 'Status' (Draft), and 'Review URL'. A 'Start Review' button is visible. Below these fields, the checkbox 'Require electronic signatures for formal reviews' is checked and highlighted with a yellow box. Another checkbox, 'Mark Review As Complete only when all artifacts have been reviewed', is unchecked.

Enabling this setting gives review creators the opportunity to require approver authentication in a formal review by default. (See [Baselines and reviews](#), and [About electronic signatures](#) for more information).

Meaning of Signature

Selecting the **Enable Meaning of Signature** checkbox allows you to create meaning-of-signature definitions (for example, Authorship, Responsibility, Review, or Approval), and assign them to specific project roles. When the project role is assigned to a user, that role's meaning of signature is also associated with them; whenever the user provides an electronic signature in a review, this additional information will appear in the review sign-off history, elaborating on the approver's role in the project.

Managing meaning-of-signature definitions

1. Open the *Project Administration Console*.
2. Click the **Project Settings** button on the ribbon.
3. Click to **Manage** meaning-of-signature definitions.
4. Perform the desired changes to the list of meaning-of-signature definitions:
 - Reorder the list by selecting a definition and using the **Move Up** and **Move Down** buttons.
This only affects the order in which meaning-of-signature definitions appear when being assigned to a project role.
 - **Add a New Meaning of Signature.**
 - Delete an unsaved meaning-of-signature definition by selecting it and clicking its corresponding X icon.
5. Click **Save**.

Enhanced Electronic-Signature Configuration Checklist

The following is a summary of Blueprint configuration steps that will further secure electronic signatures for sign-off during reviews. Performing these steps can make your project compliant with regulatory frameworks such as Title 21 CFR Part 11 (FDA), Payment Card Industry Data Security Standard (PCI DSS), and Sarbanes–Oxley.

Note that different Blueprint administrators may be required to complete these steps:

- Configure a password expiry policy in the *Instance Settings* tab in the Instance Administration Console.
Note that if you are using federated authentication, the Blueprint password policy should still be configured if users are configured for fallback to database or LDAP authentication.
- Configure the project to include meaning-of-signature definitions in Project Settings.
This setting also requires review approvers to enter their username in addition to their password when signing off.
- Ensure review approvers have been assigned appropriate meaning-of-signature definitions in the Project Administration Console:
 - All applicable meaning-of-signature definitions have been created in the *Project Settings* tab.
 - Meaning-of-signature definitions have been assigned to appropriate project roles in the *Project Roles* tab.
 - All review approvers have been assigned one or more of these project roles in the Project Role Assignments tab.
- Ensure your review authors understand the additional electronic signature options and information in formal reviews.