



Bluespring BPM₅ Installation Guide

This document is intended to provide step by step directions for the installation of the Bluespring BPM₅ services and applications.

January 2013

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Introduction

You purchased Bluespring Software's BPM₅, an innovative version of Business Process Management (BPM) software which will allow your company to effectively reduce cost, increase customer responsiveness, ensure quality, maintain compliance, and manage growth with proven success. Bluespring Software has acted as a supplement to an array of companies' business processes since 1998.

This guide will lead you through the installation of the various BPM₅ Services. If you have questions about the installation, please contact Bluespring Support by email at support@bluespring.com or by phone at (877) 871-9566.

The following services and applications will be installed upon the completion of the steps in this guide:

- BPM Workspace Service
- BPM Task Service
- BPM Notification Service
- BPM Scheduling Service
- BPM Process Engine Service
- BPM File Monitor Service (optional)
- BPM SharePoint Service (optional)
- BPM CRM Service (optional)
- BPM CRM 2011 Service (optional)
- BPM Designer 5
- BPM Admin 5
- BPM Command Service

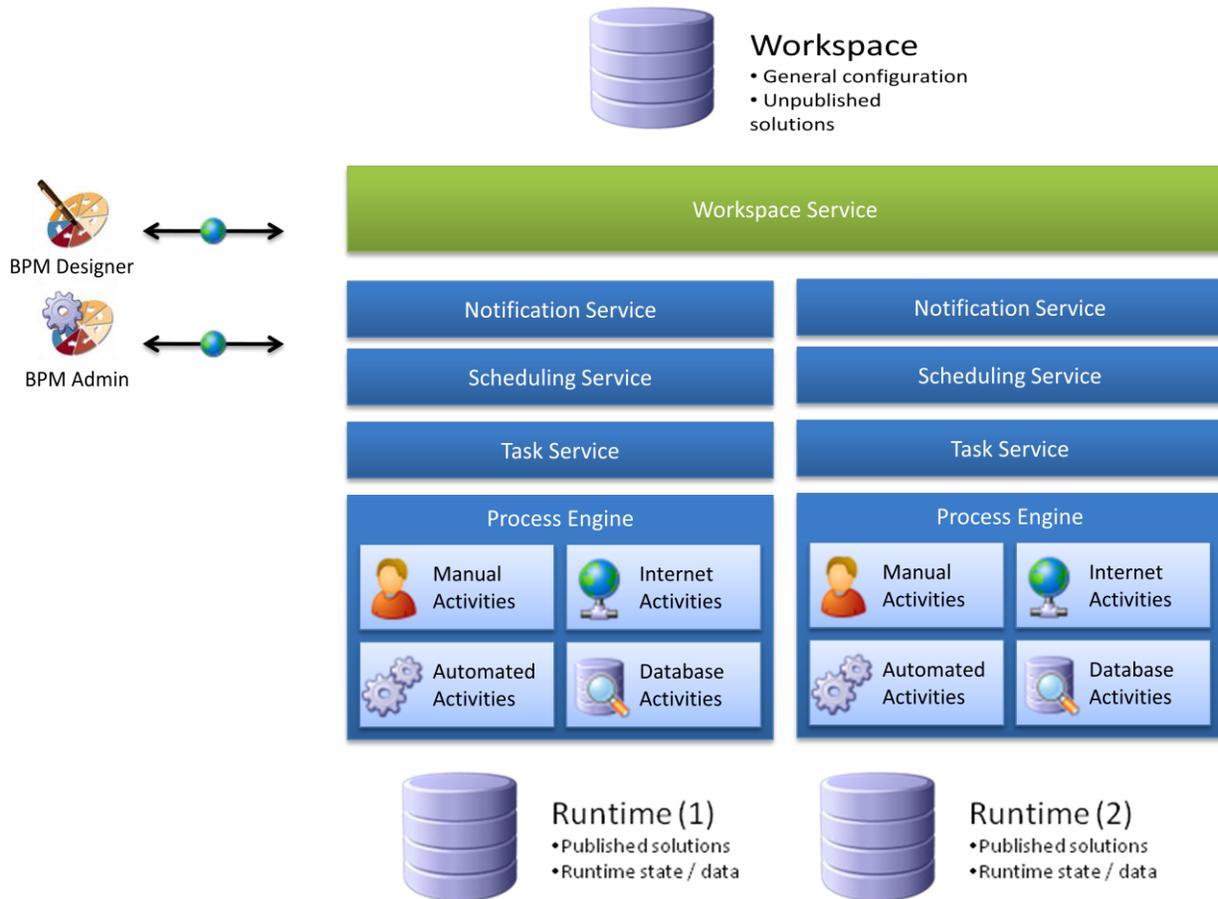
BPM₅ Capabilities

You can use BPM₅ to perform a series of automated and managed tasks as part of your business processes. Key capabilities include:

- Collaborative definition and deployment of process solutions that span any combination of people, systems, data sources, locations, and organizational entities.
- Improved utilization of Microsoft investment (SharePoint, Dynamics, Exchange, etc).
- Ability for you to control your existing IT assets, including systems, data sources, and documents, within any business process, through standards-based integration methods.
- Management of steps that require human interaction for the completion of a task.
- Operation as a non-intrusive service within your existing infrastructure to drive highly consistent, reliable, scalable, and dynamic automated processes.
- Presentation of tools which will allow you to effectively monitor and manage the operating process on a real-time basis.

- Ability to report in real-time how a business process is performing and make decisions that positively impact your bottom line.

BPM₅ Architecture



BPM₅ will run against one Workspace which supports multiple run-time environments.

The number of run-time environments you create will support your process development lifecycle. Development lifecycles may vary and BPM₅ is designed to support agile and waterfall approaches to process development.

Hardware and Software Requirements

Verify that the server(s) you have designated for Bluespring BPM₅ meet the following hardware and software requirements.

Hardware	Software
<ul style="list-style-type: none"> <input type="checkbox"/> 32-bit or 64-bit <input type="checkbox"/> CPU > 2.2 GHz (Dual or Quad Core recommended, depending upon volume projections) <input type="checkbox"/> 4 GB RAM <input type="checkbox"/> 10 GB usable disk space (additional storage for databases required) <input type="checkbox"/> 100BaseTX Ethernet Network Adapter (Gigabit Ethernet recommended) <input type="checkbox"/> Separate Hardware RAID 10 volumes are recommended for database data, index, and log files (when used in production environment) 	<ul style="list-style-type: none"> <input type="checkbox"/> Services require one of the following: Windows Server 2008 Windows Server 2008 R2 <input type="checkbox"/> Designer and Admin support: Windows XP Windows Vista Windows 7 <input type="checkbox"/> Message Queuing Component/Feature[^] <input type="checkbox"/> .NET Framework 4.0* <input type="checkbox"/> Windows Identity Foundation* <input type="checkbox"/> SMTP-compliant server in the enterprise <input type="checkbox"/> Database server with one of the following: Microsoft SQL Server 2008 Standard Microsoft SQL Server 2008 Enterprise Microsoft SQL Server 2008 R2 Standard Microsoft SQL Server 2008 R2 Enterprise Microsoft SQL Server 2012 Standard Microsoft SQL Server 2012 Enterprise

* These files can be downloaded for free from Microsoft's web site (www.microsoft.com).

[^] Only required on the server hosting the Process Engine service. For Server 2003, you only need to select the Common subcomponent of the Message Queuing component. For Server2008, you only need to select the Message Queuing Server service of the Message Queuing feature.

Bluespring recommends that BPM₅ be installed on a minimum of two servers to get started. Additional Workspace and Runtime servers may be required to support your process development lifecycle.

Workspace and Runtime Server

This server hosts the Workspace, Process Engine, Task, Notification, Scheduling and other runtime services for a single runtime environment. The first runtime environment will likely be your "development" runtime environment. You can then stand up subsequent runtime environments (additional servers) to support testing, staging, and production environments.

Bluespring Support Policy

Bluespring Software is committed to providing you with the best overall product experience. Our products are designed with superior quality and ease of use in mind, but we understand that issues do arise from time to time that need the backing of our support resources.

For more information, please contact Bluespring Software's Customer Support Operations at (877) 871-9566.

Bluespring support services are subject to the prices, terms, and conditions in place at the time the services are used.

Contact Information

Address: 10290 Alliance Road
Cincinnati, Ohio
45242

Telephone: (513) 794-1764 (Cincinnati)
(877) 871-9566 (Toll Free)

Fax: (513) 794-1724

WWW: www.bluespring.com
www.bluespringsoftware.com
www.bluespringonline.com

Email: support@bluespring.com

Office hours: Monday to Friday
8:00 A.M. to 5:00 P.M. Eastern Time

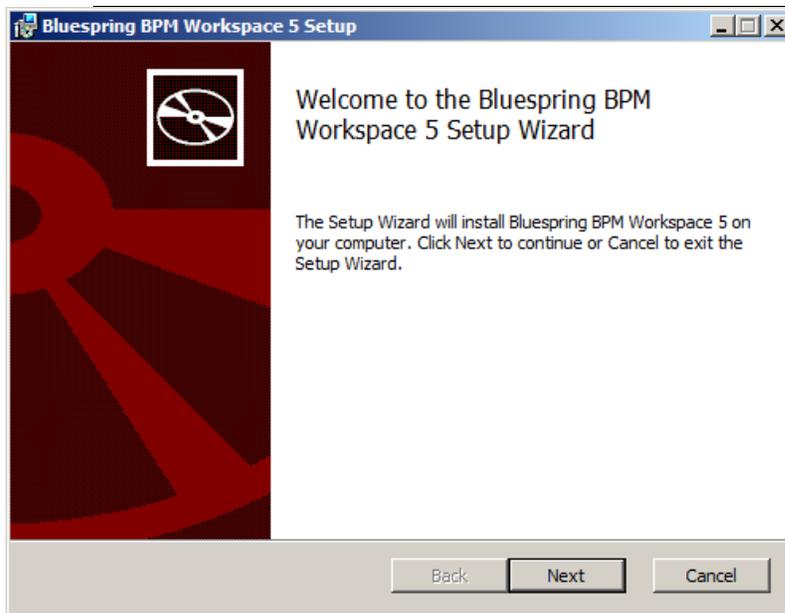
Installing BPM Workspace Service

The BPM Workspace Service manages communication between the BPM₅ services, the BPM₅ Workspace Database, and the BPM₅ Runtime Databases.

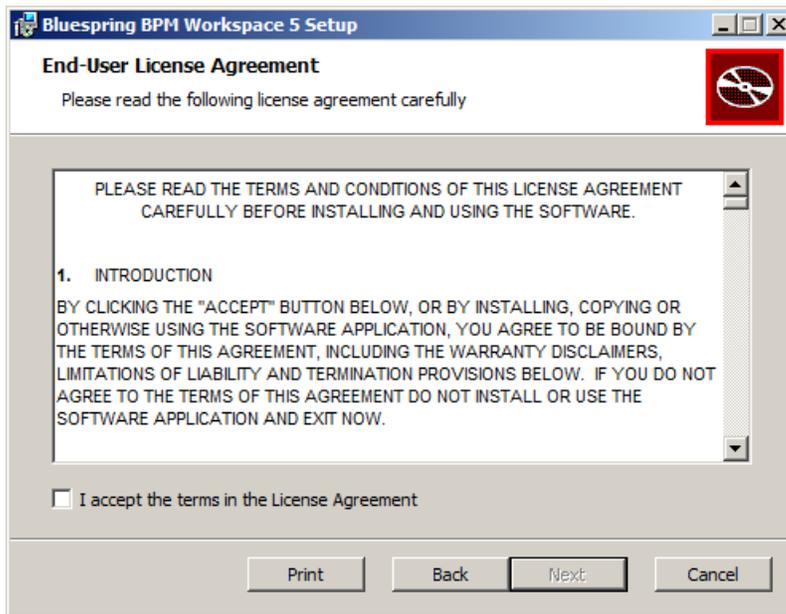
To install the BPM Workspace Service, complete the following steps:

1. Double-click the BPM Workspace setup file (**bpm workspace.msi**). The **BPM Workspace 5 Setup Wizard** is displayed.

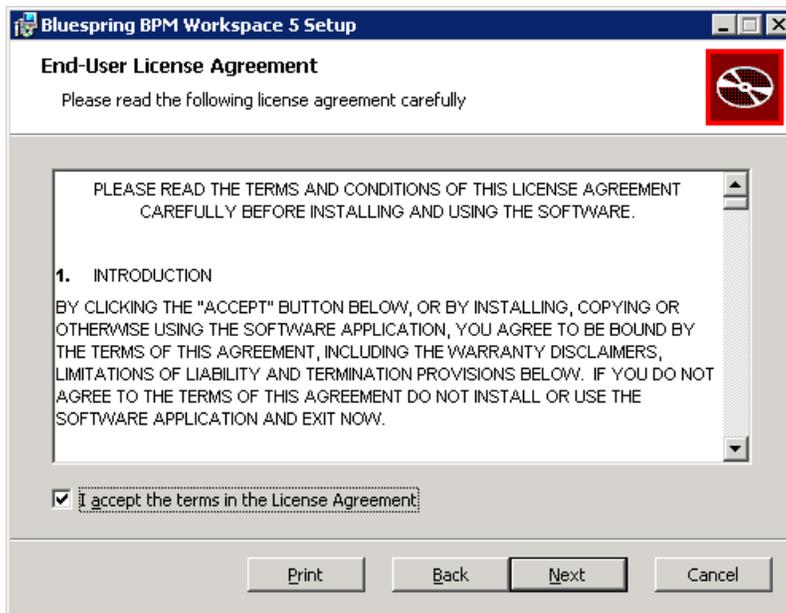
Note: If you encounter an error during the install, please retry the install, but double-click the **bpm workspace.bat** file to start the install. Using that file will generate a detailed installation log file. You can send this log file to Bluespring Support for assistance.



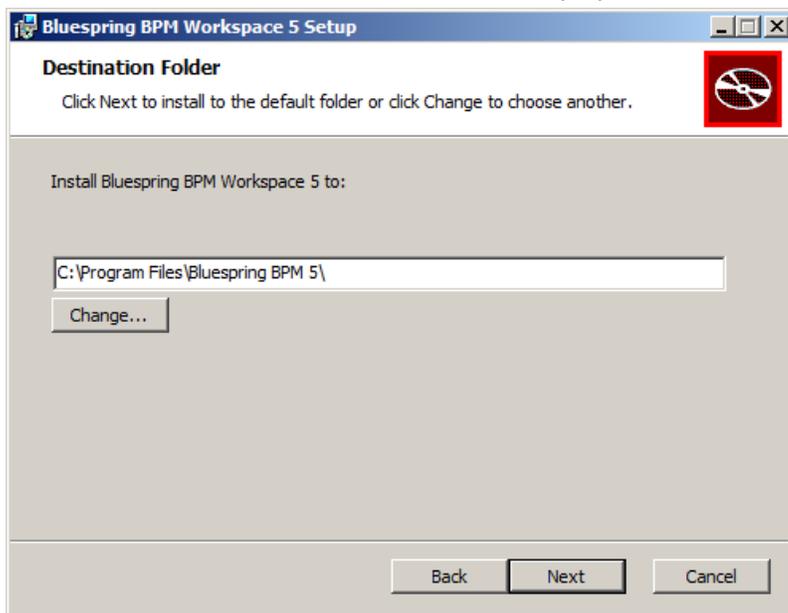
2. Click **Next**. The **End-User License Agreement** screen is displayed



3. After reading the agreement, select the **I accept the terms in the License Agreement** checkbox.

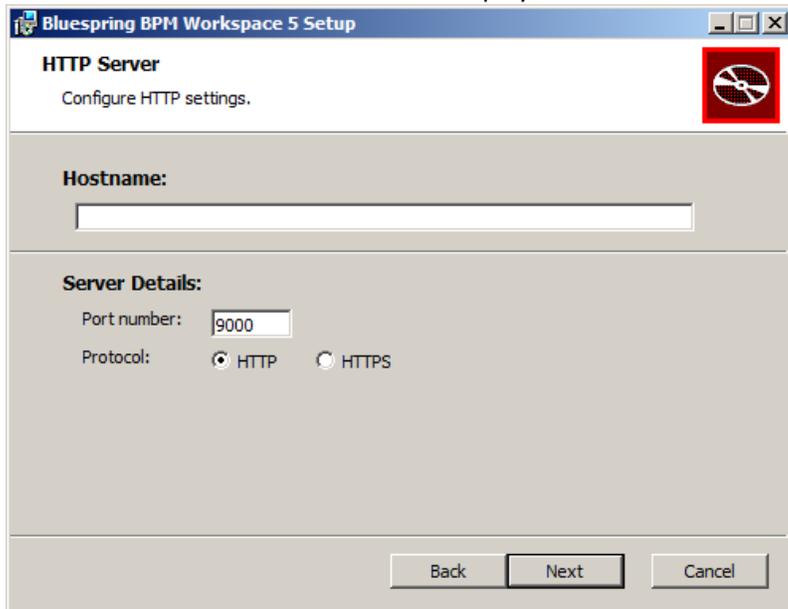


- Click **Next**. The **Destination Folder** screen is displayed.



Note: If you want to choose a different destination folder, click **Change** and select the folder where you want to store the BPM Workspace Service files.

- Click **Next**. The **HTTP Server** screen is displayed.



- In the **Hostname** field, type the name of the host server.

Note: Bluespring recommends using the server's Fully Qualified Domain Name (FQDN). If you do not know the server's FQDN, please contact your IT department.

For example, if your domain is called domain.net and the server name is BPM, then the FQDN would be bpm.domain.net.

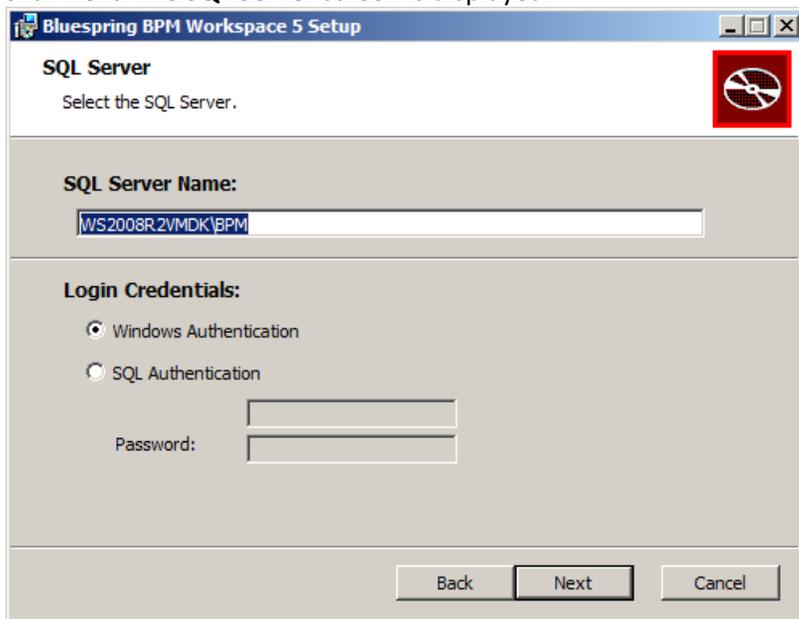
7. In the **Server Details** fields:
 - a. Type the port number in the Port number field. The Workspace Service will listen for requests on this port.

Note: Port 9000 is the default port used by BPM 5's services; however, you can change the port number if port 9000 is used by another application.

- b. Select **HTTP** from the **Protocol** options. You select HTTP to transmit unencrypted data and HTTPS to transmit encrypted data.

Note: Using HTTPS requires additional system configuration for security certificates. Please contact Bluespring Support if interested in using HTTPS.

8. Click **Next**. The **SQL Server** screen is displayed.



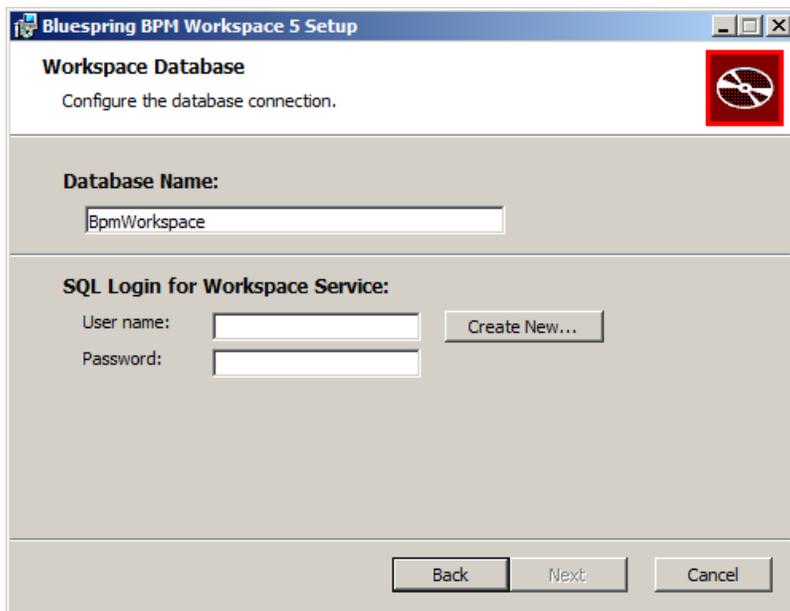
9. In the **SQL Server Name** field, type the name of your Microsoft SQL Server 2005/2008 server and SQL instance, if applicable.

Note: The SQL Server instance must be configured to use mixed mode authentication, so it can support SQL logins.

10. From the **Login Credentials** fields, select the required authentication type.

Note: Windows Authentication will use the account of the Windows user performing the install. If that user does not have System Administrator (sysadmin) permissions to the server, then select the SQL Authentication option and enter the credentials of a SQL login account. This account is used only while creating the Workspace database and, if necessary, SQL logins.

11. Click **Next**. The **Workspace Database** screen is displayed.



12. In the **Database Name** field, type a name for your Workspace database.
13. In the SQL Login for Workspace Service fields, click **Create New**. The **Create SQL Login** window is displayed.

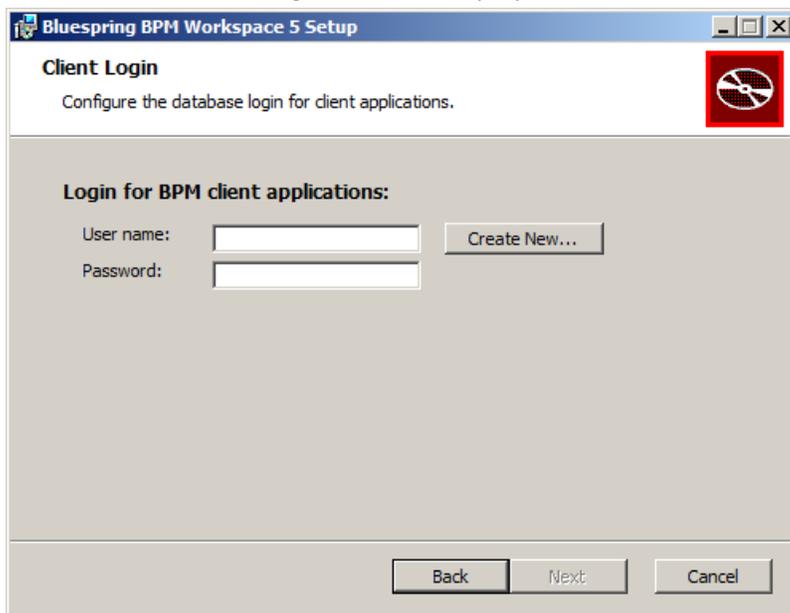
Note: If you have a SQL Login, type that user name and password in the respective fields and skip to step 15. The account will be added to a new SQL role called Bluespring.

You type the credentials for a new SQL user account used by the Workspace Service to connect to the Workspace database.



14. Complete the following fields:
 - a. In the **User name** field, type the user name.
 - b. In the **Password** field, type the user's password.
 - c. In the **Confirm password** field, retype the password.
15. Click **OK**. You created a new SQL login for the Workspace service.

16. Click **Next**. The **Client Login** screen is displayed.



17. In the Login for BPM client applications fields, click **Create New**. The **Create SQL Login** window is displayed.

This login will be used by BPM Designer clients to read and write information to the Workspace database.

Note: If you have a SQL Login, type that user name and password in the respective fields and skip to step 19. The Client SQL login is assigned lesser permissions than the Workspace Login. Bluespring recommends that you do not use the Workspace Login for the client login because of the security differences.

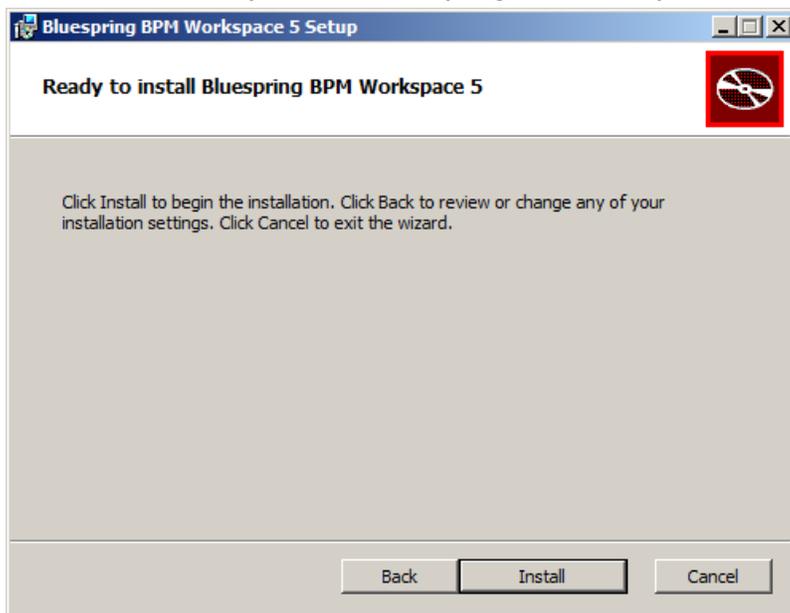


18. Complete the following fields to create a new SQL login:

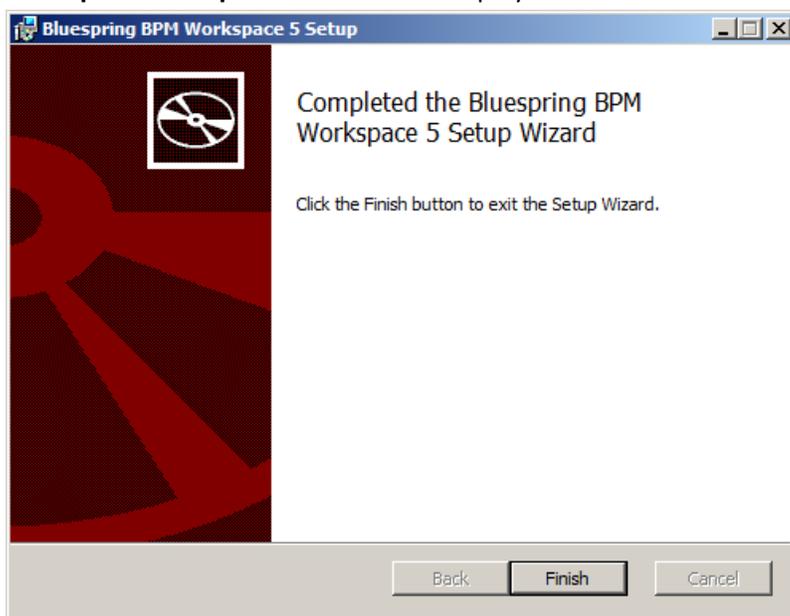
- a. In the **User name** field, type your user name.
- b. In the **Password** field, type your password.
- c. In the **Confirm password** field, retype the password.

19. Click **OK**. You created a new login for BPM client applications.

20. Click **Next**. The **Ready to install Bluespring BPM Workspace 5** screen is displayed.



21. Click **Install**. The installation begins. When complete, the **Completed the Bluespring BPM Workspace 5 Setup Wizard** screen is displayed.



22. Click **Finish**. You installed the Bluespring BPM Workspace Service 5.

Verifying the BPM Workspace Service 5 Installation

Verify that your installation was successful by checking for errors in the service’s log file or by checking the service’s status in the Services utility or both.

To check for errors in the Bluespring Workspace log file, complete the following steps:

1. Navigate to the Workspace Service folder. This is the folder you selected as the destination folder in step 4 of Installing the BPM Workspace Service.
2. Open the Bluespring Workspace Service log file (**Bluespring.WorkspaceService.log**).

You should not see any errors and see two lines similar to the following two lines:

- 2010-06-14 22:41:42 WorkspaceService running =>
http://bpm:9000/Bluespring/Workspace.ashx
- 2010-06-14 22:41:42 IWorkspaceHttpService running => <http://bpm:9000/Bluespring>

To check the BPM Workspace Service installation status in the **Services** utility, complete the following steps:

1. From the **Start** menu, select **Administrative Tools** and then select **Services**.
2. In the **Services** window, select **Bluespring Workspace Service**. The status of the selected service is displayed as **Started** under the **Status** column.

Note: If the installation is successful, the status will be displayed as **Started**.

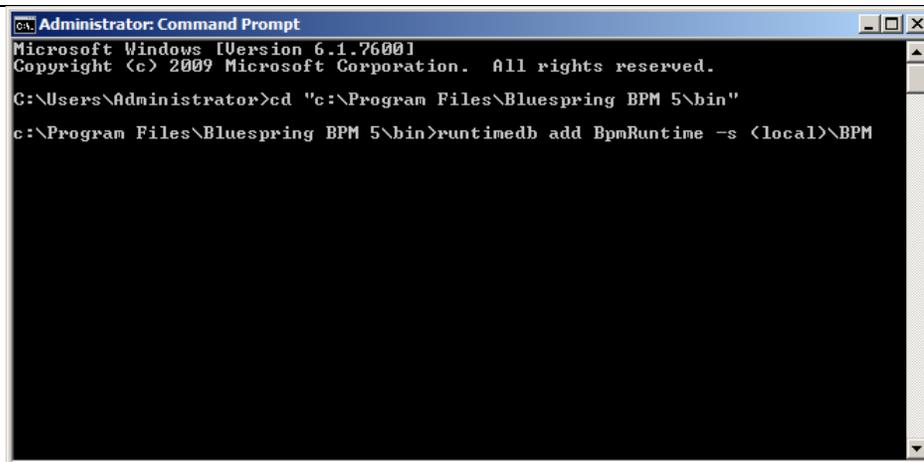
Creating a Runtime Database

You need to create a runtime database for each BPM 5 Runtime environment. Typically, companies using BPM 5 will have three runtime environments, which are separate for Development, Testing, and Production.

To create a BPM 5 Runtime database, complete the following steps:

1. From the **Start** menu on the Workspace Service server, select **All Programs > Accessories**.
2. Right-click **Command Prompt**.
3. Select **Run as administrator**. The **Administrator: Command Prompt** window is displayed.

Note: You do not need to complete steps one through three, if you are using Windows Server 2003 or if your User Account Controls are disabled.



```

Administrator: Command Prompt
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\Administrator>cd "c:\Program Files\Bluespring BPM 5\bin"
c:\Program Files\Bluespring BPM 5\bin>runtimeadb add BpmRuntime -s <local>\BPM
  
```

4. Navigate to the **bin** folder in the BPM Workspace Destination folder.

Note: This folder is the destination folder that you selected in Step 3 of the Installing the BPM Workspace Service steps.

5. Enter the following command and any parameters as necessary:

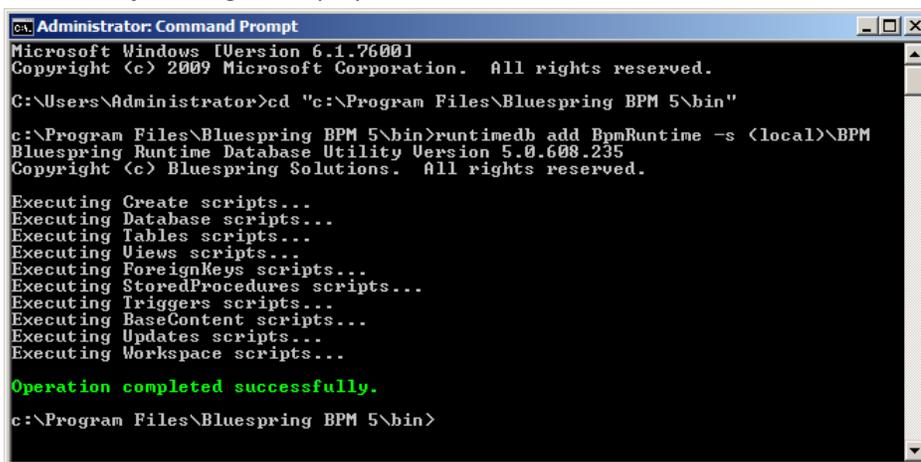
```
runtimeadb add <runtime database name>
```

Note: The SQL Server instance must be configured to use mixed mode authentication, so that it can support SQL logins.

The *runtimeadb* command also supports the switches (or parameters) in the following table:

Switch	Description
-cu	Existing SQL user account to be used as the BPM 5 runtime login. The default account is <i>client_<WorkspaceDatabase></i> if empty.
-cp	Existing SQL user's password. Auto-generated if empty.
-f	Package file. The default is <i>RuntimeDB.sqlx</i> .
-nologo	Prevents the display of logo information
-s	SQL server and instance. The default is <i>local</i> , if empty. You must specify a value if the Workspace Server is not your SQL Server.
-u	SQL user account used to create the runtime database and, if necessary, user.
-p	SQL user's password.
-t	Optional. SQL command timeout in seconds.

- Press the **Enter** key. The command starts executing. When complete, the **Operation completed successfully** message is displayed.



```

Administrator: Command Prompt
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\Administrator>cd "c:\Program Files\Bluespring BPM 5\bin"

c:\Program Files\Bluespring BPM 5\bin>runtimedb add BpmRuntime -s <local>\BPM
Bluespring Runtime Database Utility Version 5.0.608.235
Copyright (c) Bluespring Solutions. All rights reserved.

Executing Create scripts...
Executing Database scripts...
Executing Tables scripts...
Executing Views scripts...
Executing ForeignKeys scripts...
Executing StoredProcedures scripts...
Executing Triggers scripts...
Executing BaseContent scripts...
Executing Updates scripts...
Executing Workspace scripts...

Operation completed successfully.

c:\Program Files\Bluespring BPM 5\bin>

```

- Exit the command prompt. You created a runtime database.

Note: You need to select this runtime database while installing the Process Engine Service, Task Service, Scheduling Service, and Notification Service.

Updating the SMTP Information Table in the Workspace Database

You need to update the SMTP information table (Smtplnfo) after you have installed the BPM Workspace service and created the Runtime Database. You update this table, so the Notification Service knows which SMTP server to use when sending emails.

Note: These steps assume you have knowledge of Microsoft SQL Server Management Studio and have executed queries against Microsoft SQL Server databases. If you have questions, please contact your Microsoft SQL Server Database Administrator.

To update the SMTP information table in the Workspace database, complete the following steps:

1. Connect to the SQL server and instance hosting your Workspace database, using Microsoft SQL Server Management Studio.
2. Select the following:
 - a. From the **Server type** drop down list, the type of the server (e.g. Database Engine).
 - b. From the **Server name** drop down list, the name of your SQL server.
 - c. From the **Authentication** drop down list, the required authentication.
3. Click **Connect**. The **Microsoft SQL Server Management Studio** window is displayed.
4. On the toolbar, click **New Query**.
5. Type the following query:

```
DECLARE @RuntimeDatabase as varchar(500),
        @Smtplnfo as varchar(500),
        @Port as integer
```

```
SET @RuntimeDatabase = 'BpmRuntime'
SET @Smtplnfo = 'CompanySMTPServerName'
```

```
SET @Port = 25
DECLARE @EnvID as uniqueidentifier
SET @EnvID = NULL
```

```
SELECT TOP 1 @EnvID = [ID]
FROM dbo.Environment
WHERE [Name] = @RuntimeDatabase
```

```
/* Returns the contents of Smtplnfo before any changes are made */
SELECT * FROM dbo.Smtplnfo
```

```
IF @EnvID IS NOT NULL
    IF 0 < (SELECT COUNT(*) FROM dbo.Smtplnfo WHERE EnvironmentID = @EnvID)
        UPDATE dbo.Smtplnfo
```

```

SET Host = @SmtpServer,
    Port = @Port
WHERE EnvironmentID = @EnvID
ELSE
    INSERT dbo.SmtpInfo (EnvironmentID, Host, Port, [Timeout])
    VALUES (@EnvID, @SmtpServer, @Port, 60000)
ELSE
    SELECT 'ERROR: No Environment ID was found for the Runtime DB: ' +
    ISNULL(@RuntimeDatabase, 'ERROR')

/* Returns the contents of SmtpInfo after any changes are made */
SELECT * FROM dbo.SmtpInfo

```

Note: Replace the <SMTP Server> and <Runtime Database Name> placeholders with the name of your SMTP server and the name of your Runtime database, respectively. For information on the Host and the Port number, contact your IT department.

The query sets the timeout to 1 minute, which is 60000 milliseconds. To change the timeout, modify the 60000 value before executing the query. You can later modify the value in the database to increase or decrease the timeout.

6. Execute the query against your Workspace database. The corresponding ID, Environment ID, Host name, Port number, and Timeout are displayed in the **Results** tab.
7. Exit the SQL Server Management Studio. You updated the SMTP Information table.

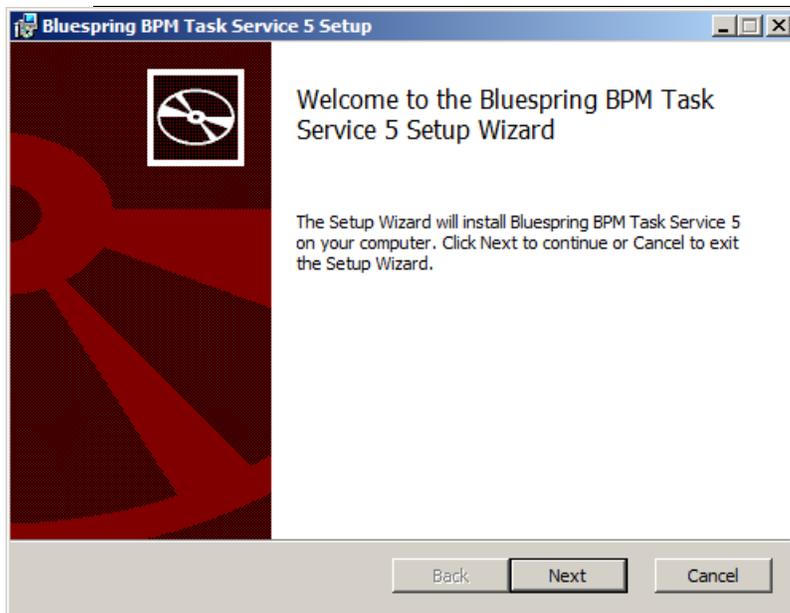
Installing BPM Task Service

The BPM Task Service is a Windows service that manages the execution of process activities and the assignment of tasks to people in a process.

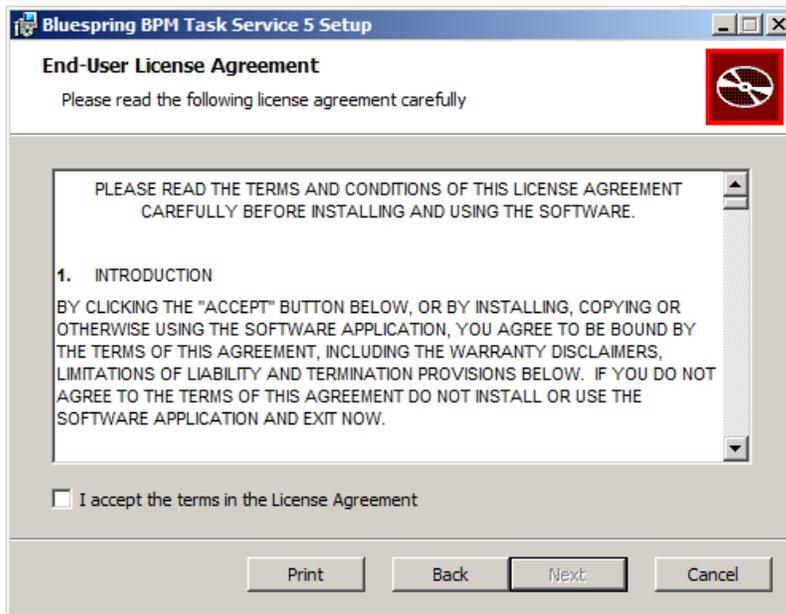
To install the BPM Task Service, complete the following steps:

1. Double-click the BPM task service setup file (**bpm task service.msi**). The **Bluespring BPM Task Service 5 Setup Wizard** is displayed.

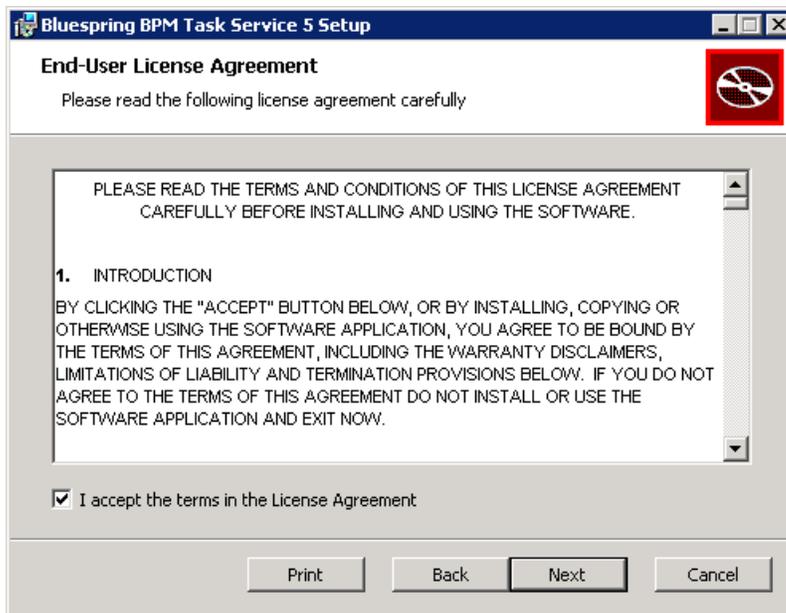
Note: If you encounter an error during the install, please retry the install, but double-click the **bpm task service (logfile).bat** file to start the install. Using that file will generate a detailed installation log file. You can send this log file to Bluespring Support for assistance.



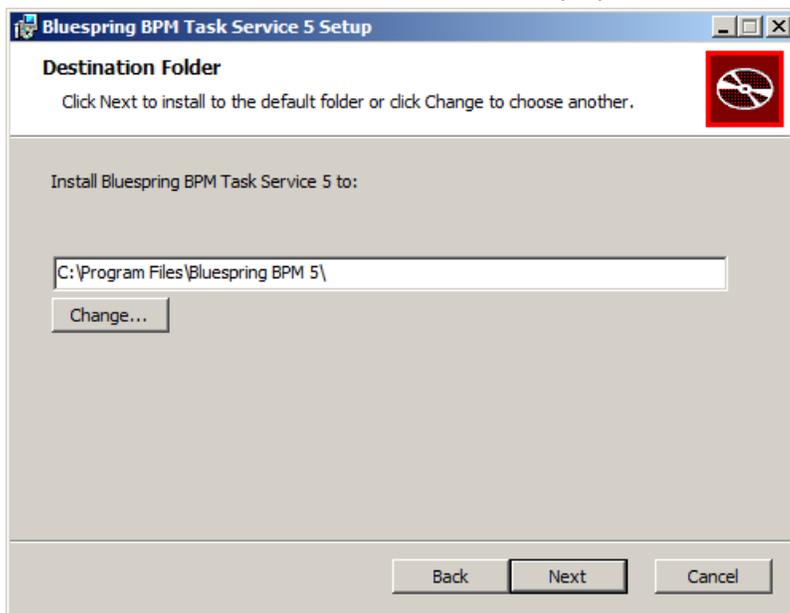
2. Click **Next**. The **End-User License Agreement** screen is displayed.



3. After reading the agreement, select the **I accept the terms in the License Agreement** check box.



- Click **Next**. The **Destination Folder** screen is displayed.



Note: If you want to choose a different destination folder, click Change and select the folder where you want to store the BPM Task Service files.

- Click **Next**. The **BPM Workspace** screen is displayed.
- In the **Workspace server name** field, type the name of the server hosting your Workspace service.
- In the **Port number** field, type the Workspace Service's Port Number.

Note: The port number you enter here should be the same port number you entered on the **HTTP Server** screen in the Workspace Service install.

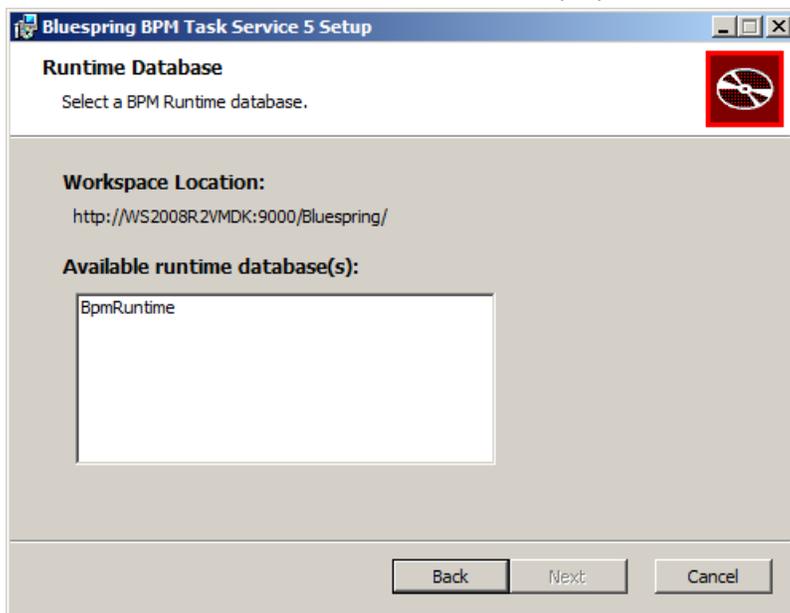
- Select the Protocol (HTTP or HTTPS) that is used by the Workspace Service.

Optionally, to connect as another user, complete the following steps:

- Select the Connect as another user checkbox.
- Type the User name and Password of a domain user that is a member of the Local Administrators group on the server hosting the Task service.

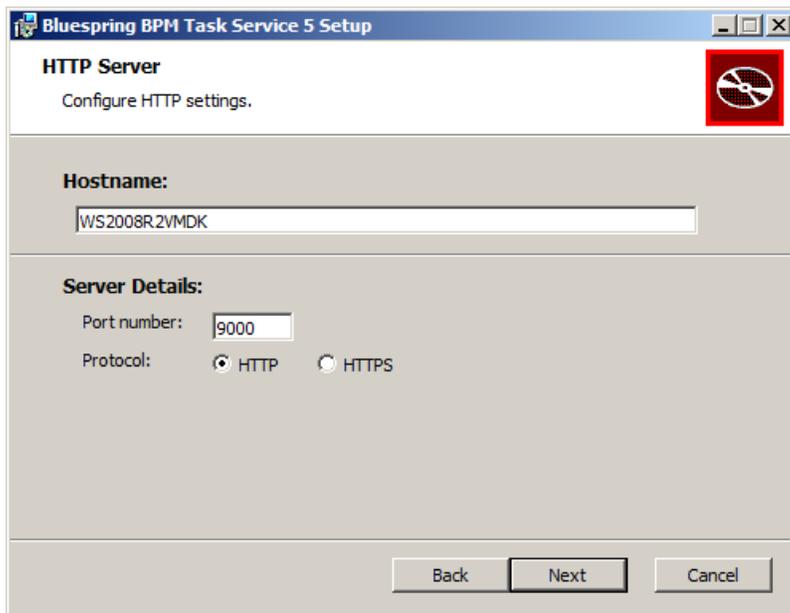
Note: By default, the Task Service will connect to the Workspace Service using the Local System account. The Local System account does not have permission to access the Workspace Service when it is hosted on a remote server.

9. Click **Next**. The **Runtime Database** screen is displayed.



10. From the **Available runtime database(s)** list, select the Runtime Database that you created in the section **Creating a Runtime Database**.

11. Click **Next**. The **HTTP Server** screen is displayed.



12. In the **Hostname** field, type the name of the host server.

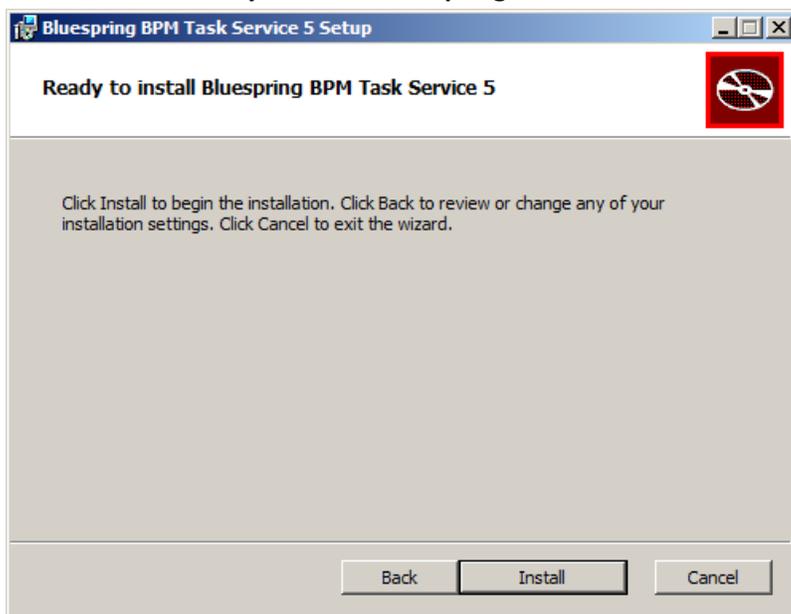
13. In the **Server Details** fields type the following details:

- a. Type the port number in the Port number field. The Task Service will listen for requests on this port.

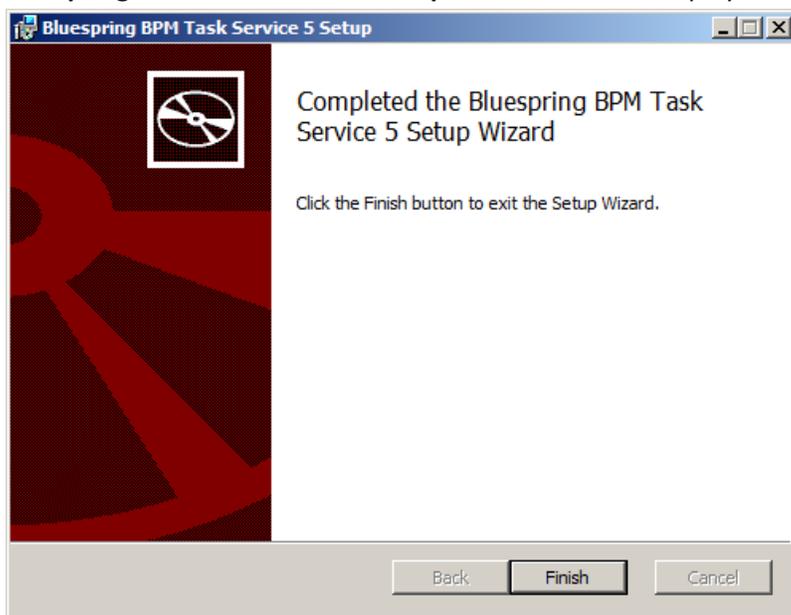
Note: Port 9000 is the default port used by BPM 5's services; however, you can change the port number if port 9000 is used by another application

- b. Select HTTP from the Protocol options. You select HTTP to transmit unencrypted data and HTTPS to transmit encrypted data.

14. Click **Next**. The **Ready to install Bluespring BPM Task Service 5** screen is displayed.



15. Click **Install**. The Installation begins. When the installation is completed, the **Completed the Bluespring BPM Task Service 5 Setup Wizard** screen is displayed.



16. Click **Finish**. You installed the Bluespring BPM Task Service 5.

Verifying the BPM Task Service 5 Installation

Verify that your installation was successful by checking for errors in the service's log file or by checking the service's status in the Services utility or both.

To check for errors in the Bluespring Task Service log file, complete the following steps:

1. Navigate to the Task Service folder. This is the folder you selected as the destination folder in step 4 of Installing the BPM Task Service.
2. Open the Bluespring Task Service log file (**Bluespring.TaskService.log**).

You should not see any errors and the first three lines should be similar to the following lines:

- 2010-06-17 14:20:34 ITaskService stopped => http://bpm-qa.qa.bluessw.net:9000/Bluespring/BpmRuntime/Tasks.ashx
- 2010-06-17 14:20:34 ITaskHttpService stopped => http://bpm-qa.qa.bluessw.net:9000/Bluespring/BpmRuntime/tasks
- 2010-06-17 14:20:34 IEventCallback stopped => http://bpm-qa.qa.bluessw.net:9000/Bluespring/BpmRuntime/Tasks/Callback.ashx

To check the BPM Task Service installation status in the Services utility, complete the following steps:

1. From the **Start** menu, select Administrative Tools and then select **Services**.
2. In the **Services** window, select Bluespring Task Service. The status of the selected service is displayed as **Started** under the **Status** column

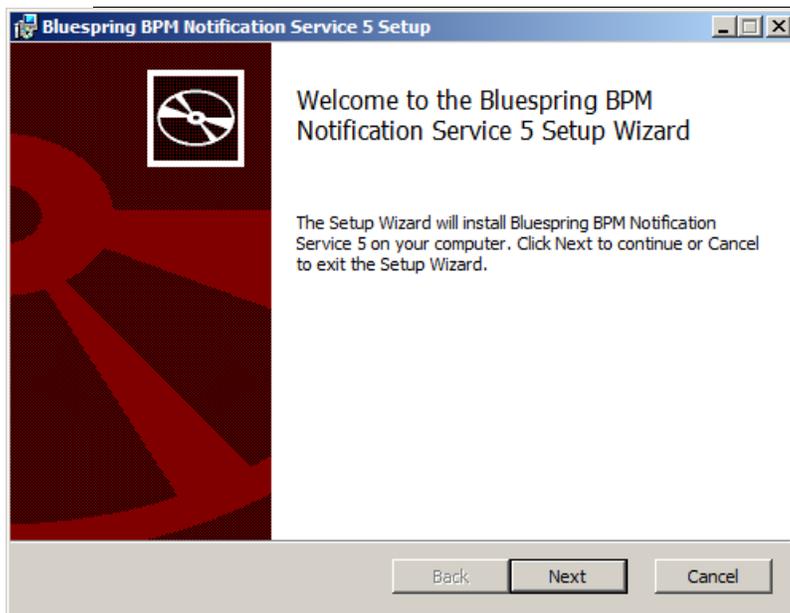
Installing BPM Notification Service

The BPM Notification Service is used to send notifications to a user. For example, the Notification Service is used by the Send Email activity and by the activities that can send task notifications. Notifications can be sent when a task is assigned, escalated, reassigned, completed, timed out, or failed.

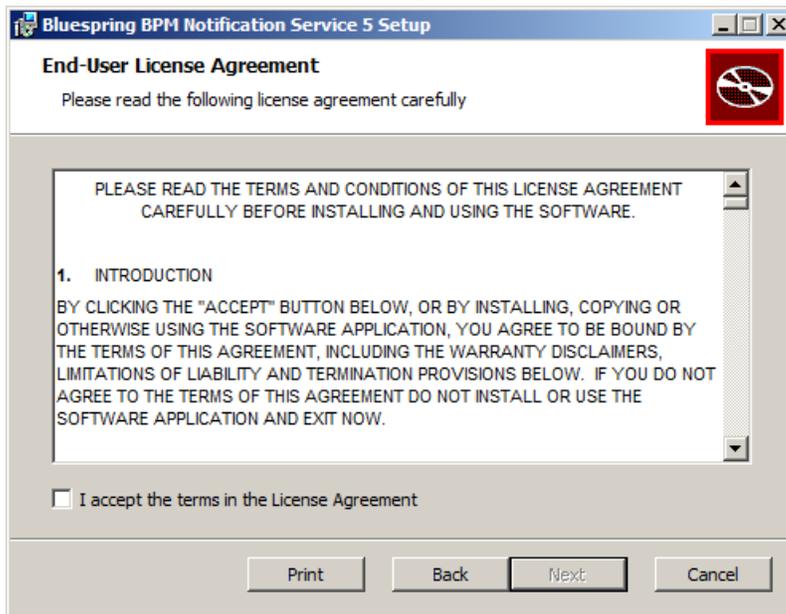
To install the BPM Notification Service, complete the following steps:

1. Double-click the BPM Notification Service setup file (**bpm notification service.msi**). The **Bluespring BPM Notification Service 5 Setup** wizard is displayed.

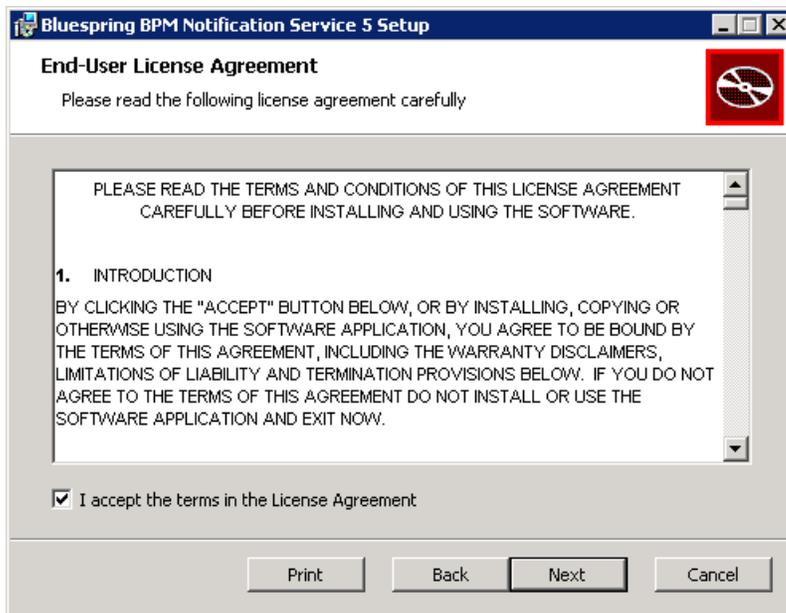
Note: If you encounter an error during the install, please retry, but double-click the **bpm notification service (logfile).bat** file to start the install. Using the install file will generate a detailed installation log file. You can send this log file to Bluespring Support for assistance.



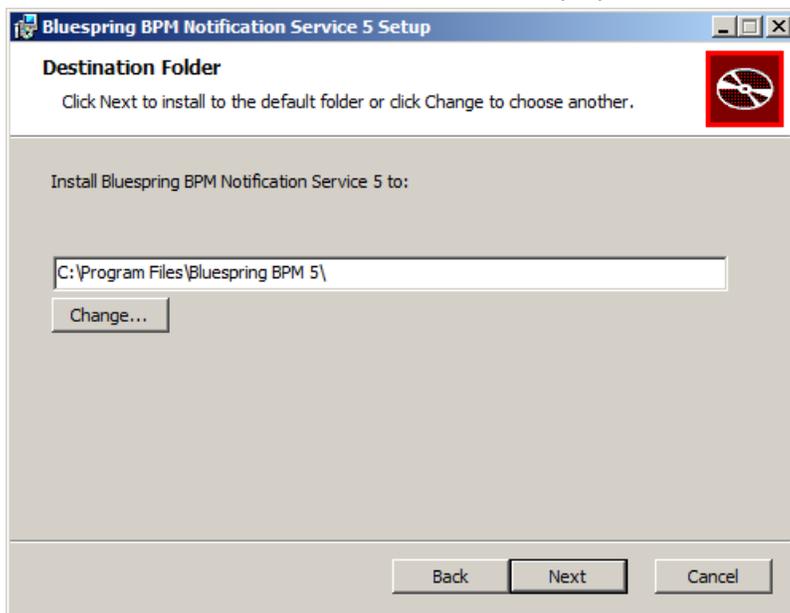
2. Click **Next**. The **End-User License Agreement** screen is displayed.



3. After reading the agreement, select the **I accept the terms in the License Agreement** check box.

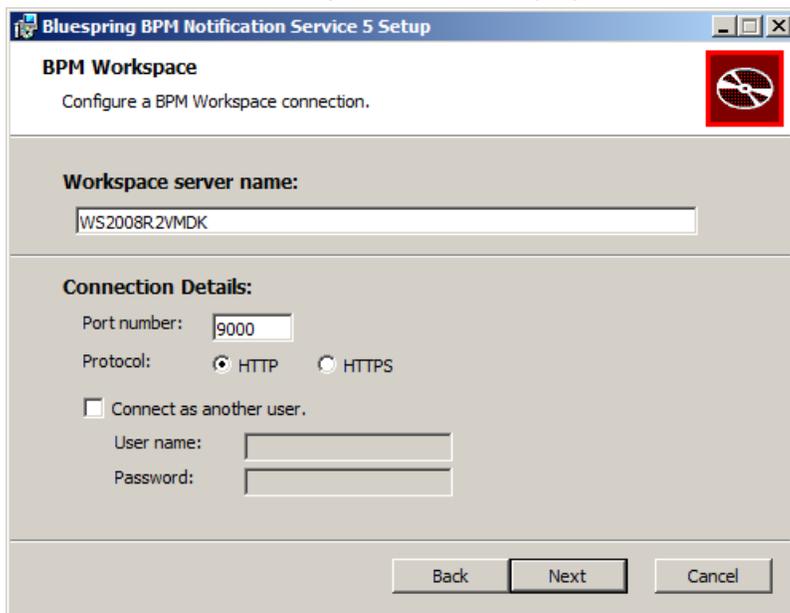


- Click **Next**. The **Destination Folder** screen is displayed.



Note: If you want to choose a different destination folder, click **Change** and select the folder where you want to store the BPM Notification Service files.

- Click **Next**. The **BPM Workspace** screen is displayed.



- In the **Workspace server name** field, type the name of your workspace server.
- In the **Port number** field, type the Workspace Service's Port Number.

Note: The port number you enter here should be the same port number you entered on the HTTP Server screen in the Workspace Service install.

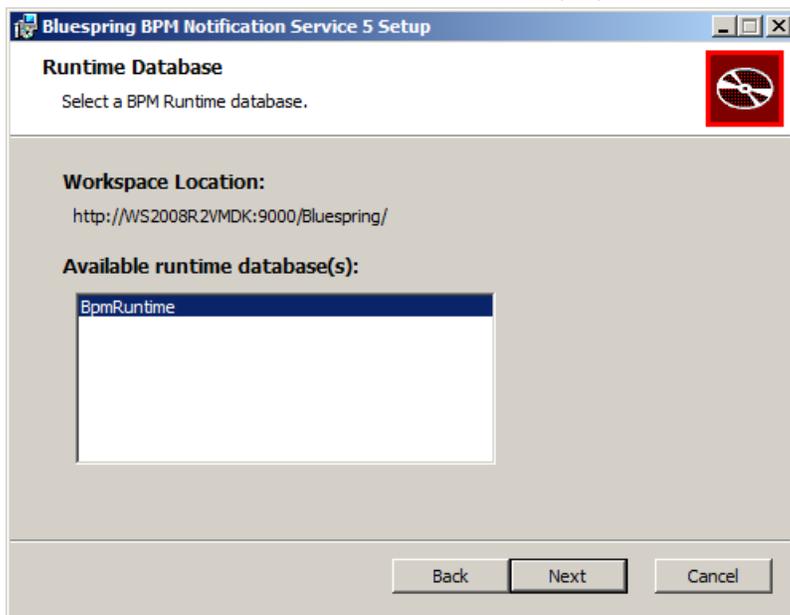
8. Select the Protocol (HTTP or HTTPS) that is used by the Workspace Service.

Optionally, to connect as another user, complete the following steps:

- Select the Connect as another user checkbox.
- Type the User name and Password of a domain user that is a member of the Local Administrators group on the server hosting the Notification service.

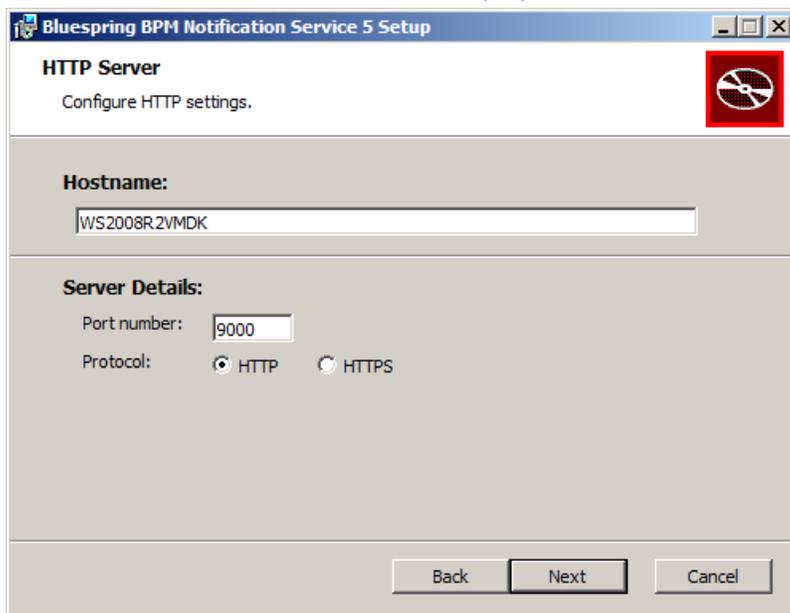
Note: By default, the Notification service will connect to the Workspace Service using the Local System account. The Local System account does not have permission to access the Workspace Service when it is hosted on a remote server.

9. Click **Next**. The **Runtime Database** screen is displayed.



10. From the **Available runtime database(s)** list, select the Runtime Database that you created in the section **Creating a Runtime Database**.

11. Click **Next**. The **HTTP Server** screen is displayed.



12. In the **Hostname** field, type the name of the host server.

13. In the **Server Details** fields type the following:

- a. The port number in the **Port number** field. The Notification Service will listen for requests on this port.

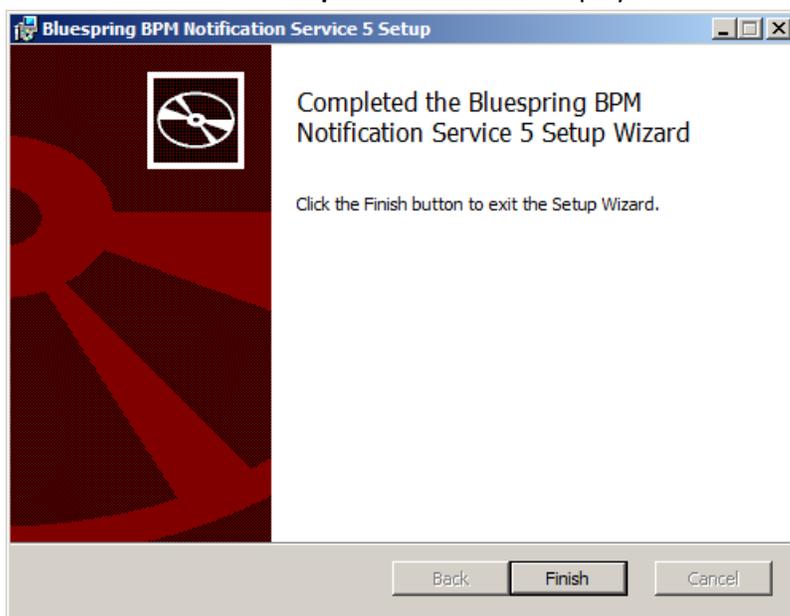
Note: Port 9000 is the default port used by BPM 5's services; however, you can change the port number if port 9000 is used by another application.

- b. Select **HTTP** from the **Protocol** options. You select HTTP to transmit unencrypted data and HTTPS to transmit encrypted data.

14. Click **Next**. The **Ready to install Bluespring BPM Notification Service 5** screen is displayed.



15. Click **Install**. The installation begins. When complete, the **Completed the Bluespring BPM Notification Service 5 Setup Wizard** screen is displayed.



16. Click **Finish**. You installed the Bluespring BPM Notification Service 5.

Verifying the BPM Notification Service 5 Installation

Verify that your installation was successful by checking for errors in the service's log file or by checking the service's status in the Services utility or both.

To check for errors in the Bluespring Notification Service log file, complete the following steps:

To check the installation status in the Services utility, complete the following steps:

1. From the **Start** menu, select **Administrative Tools**.
2. Select **Services**. The **Services** window is displayed.
3. Select **Bluespring Notification Service**. The status of the selected service is displayed as **Started** under the **Status** column.

Note: If the installation is successful, the status will be displayed as **Started**.

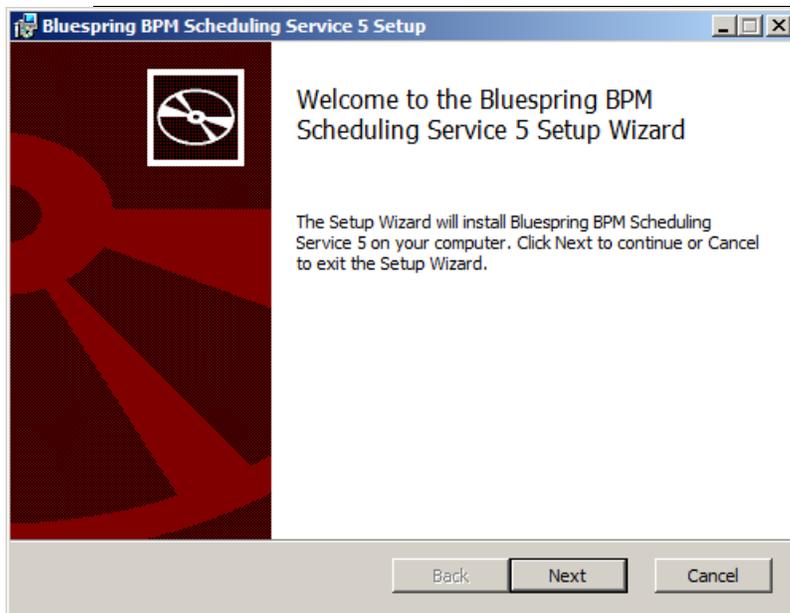
Installing BPM Scheduling Service

The BPM Scheduling service manages the starting of processes configured to use the Scheduled Start and any process delays configured in the Delay Process activity.

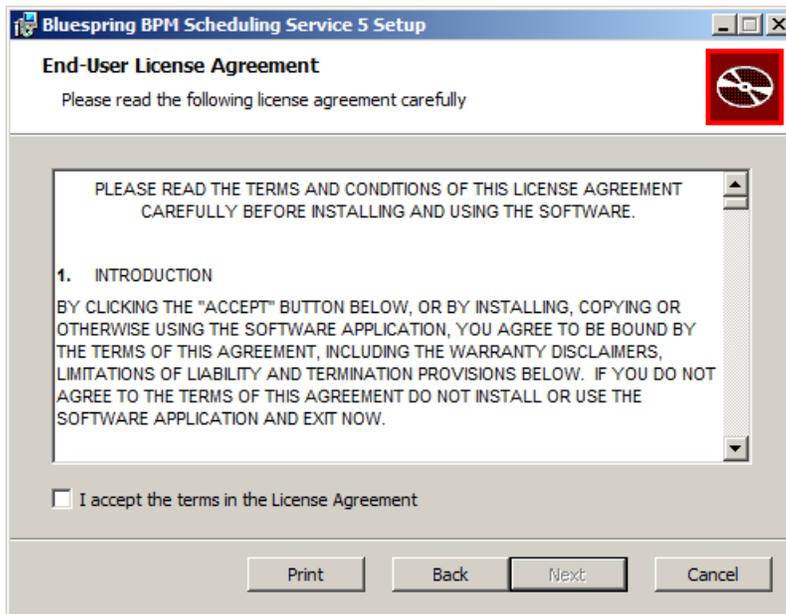
To install the BPM Scheduling Service, complete the following steps:

1. Double-click the BPM Scheduling Service setup file (bpm scheduling service.msi). The Bluespring BPM Scheduling Service 5 Setup Wizard is displayed.

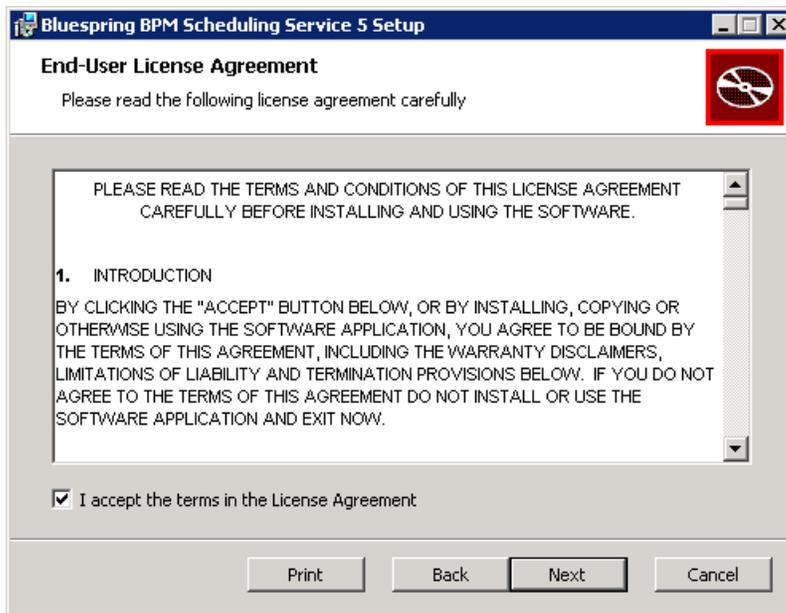
Note: If you encounter an error during the install, please retry, but double-click **the bpm scheduling service (logfile).bat** file to start the install. Using the install file will generate a detailed installation log file. You can send this log file to Bluespring Support for assistance.



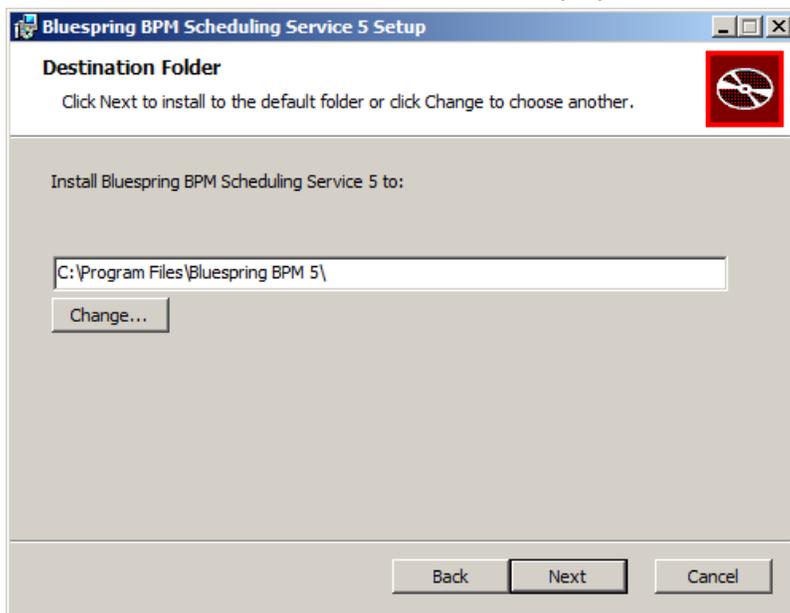
- Click **Next**. The **End-User License Agreement** screen is displayed.



- After reading the agreement, select the **I accept the terms in the License Agreement** check box.

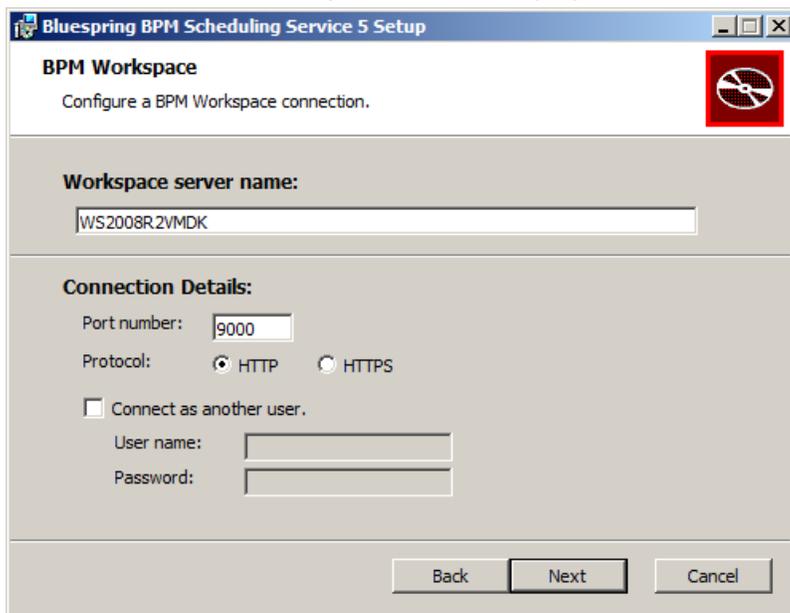


- Click **Next**. The **Destination Folder** screen is displayed.



Note: If you want to choose a different destination folder, click **Change** and select the folder where you want to store the BPM Scheduling Service files.

- Click **Next**. The **BPM Workspace** screen is displayed.



- In the **Workspace server name** field, type the name of your Workspace server.
- In the **Port number** field, type the Workspace Service's Port Number.

Note: The port number you enter here should be the same port number you entered on the **HTTP Server** screen in the Workspace Service install

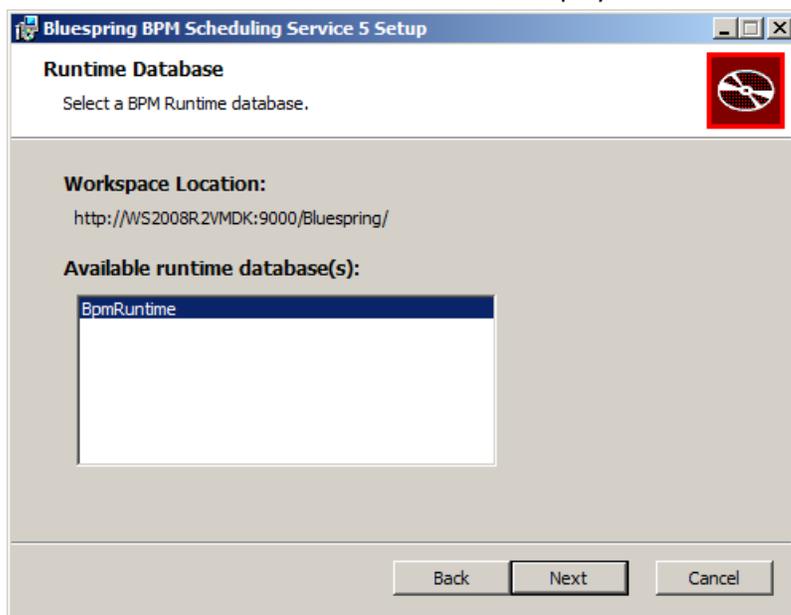
8. Select the Protocol (HTTP or HTTPS) that is used by the Workspace Service.

Optionally, to connect as another user, complete the following steps:

- Select the **Connect as another user** checkbox.
- Type the User name and Password of a domain user that is a member of the Local Administrators group on the server hosting the Scheduling service.

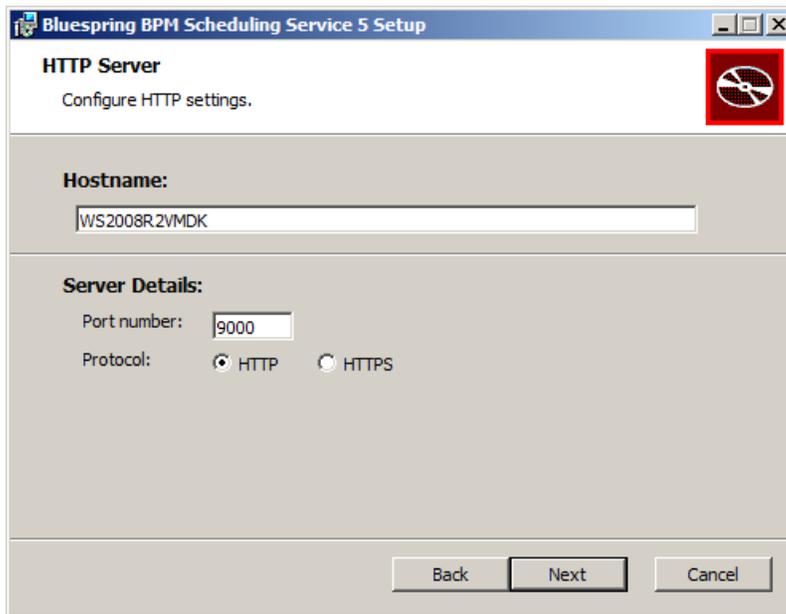
Note: By default, the Scheduling Service will connect to the Workspace Service using the Local System account. The Local System account does not have permission to access the Workspace Service when it is hosted on a remote server.

9. Click **Next**. The **Runtime Database** screen is displayed.



10. From the **Available runtime database(s)** list, select the Runtime Database that you created in the section **Creating a Runtime Database**.

11. Click **Next**. The **HTTP Server** screen is displayed.



12. In the **Hostname** field, type the name of your host server.

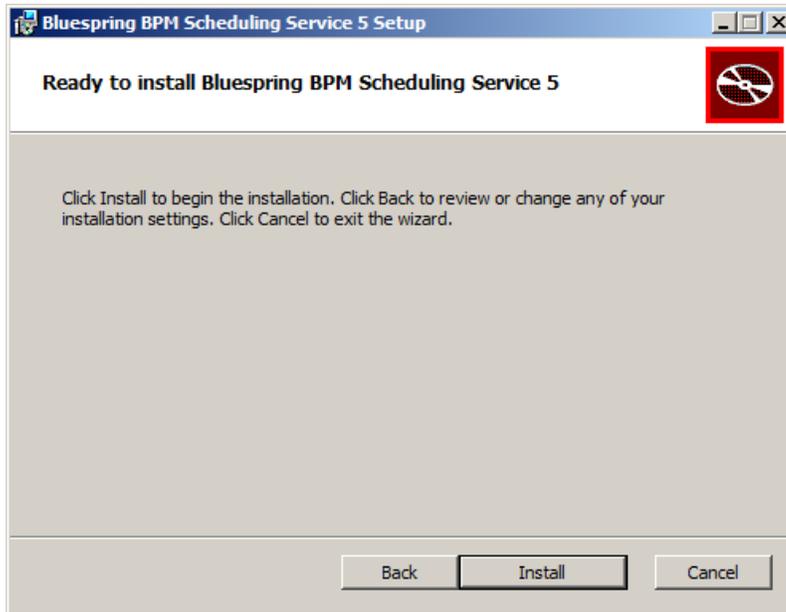
13. In the **Server Details** fields:

- a. Type the port number in the **Port number** field. The Scheduling Service will listen for requests on this port.

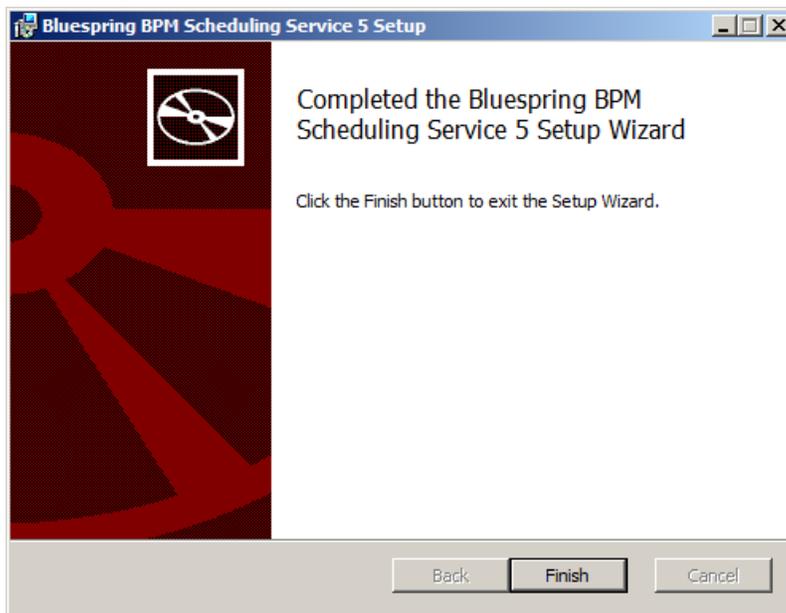
Note: Port 9000 is the default port used by BPM 5's services; however, you can change the port number if port 9000 is used by another application.

- b. Select **HTTP** from the **Protocol** options. You select HTTP to transmit unencrypted data and HTTPS to transmit encrypted data.

- Click **Next**. The **Ready to install Bluespring BPM Scheduling Service 5** screen is displayed.



- Click **Install**. The installation begins. When complete, the **Completed the Bluespring BPM Scheduling Service 5 Setup Wizard** screen is displayed.



- Click **Finish**. You installed the Bluespring BPM Scheduling Service 5.

Verifying the BPM Scheduling Service 5 Installation

Verify that your installation was successful by checking for errors in the service's log file or by checking the service's status in the Services utility or both.

To check the BPM Scheduling Service installation status in the Services utility, complete the following steps:

1. From the **Start** menu, select **Administrative Tools** and then select **Services**.
2. In the **Services** window, select **Bluespring Scheduling Service**. The status of the selected service is displayed as **Started** under the **Status** column.

Note: If the installation is successful, the status will be displayed as **Started**.

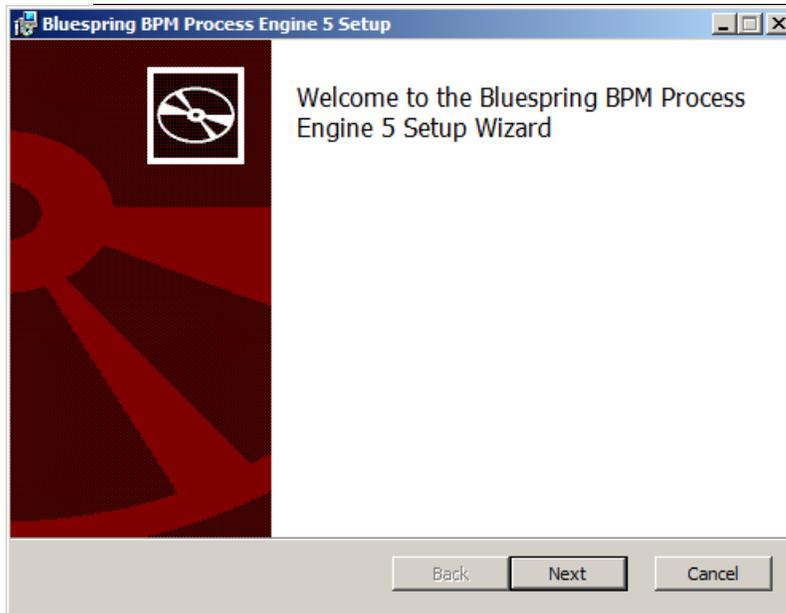
Installing BPM Process Engine

The BPM Process Engine is a Windows service that manages the processing of activities and information in a solution.

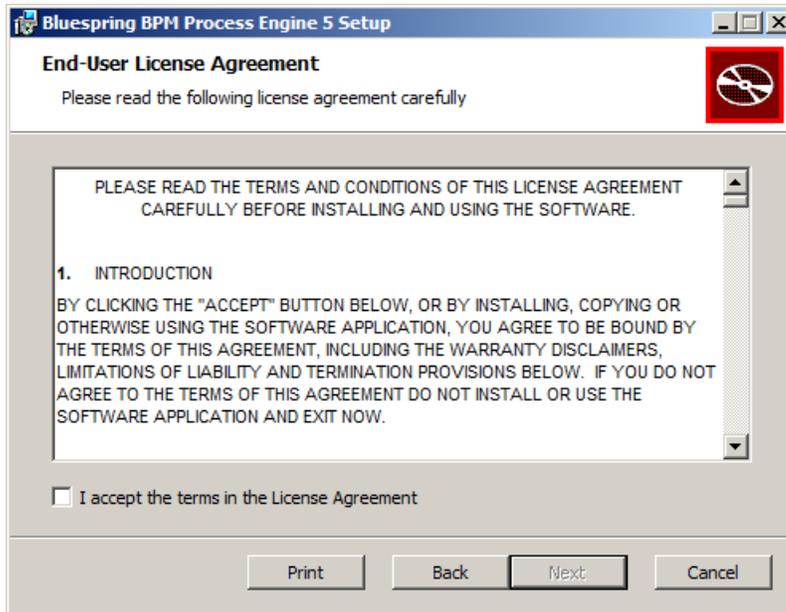
To install the BPM Process Engine complete the following steps:

1. Double-click the BPM Process Engine setup file (**bpm process engine.msi**). The **Bluespring BPM Process Engine 5 Setup Wizard** is displayed.

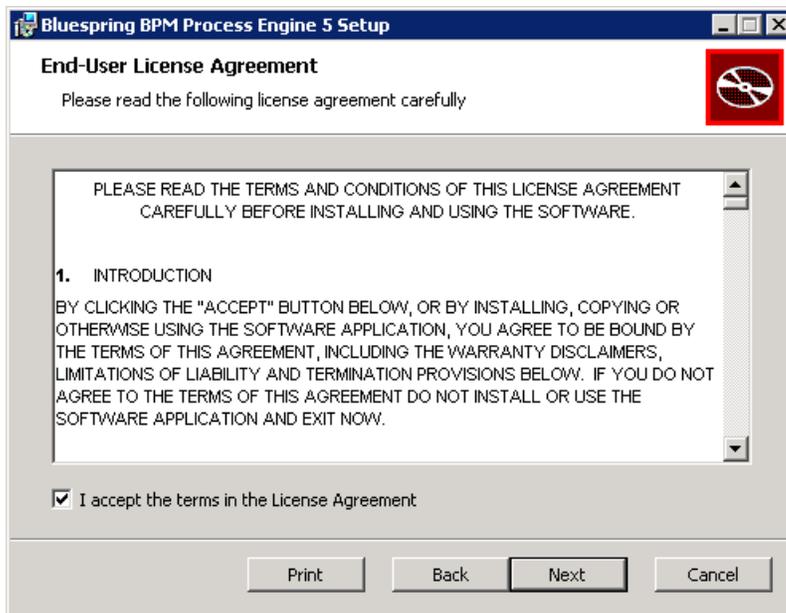
Note: If you encounter an error during the install, please retry the install, but double-click the **bpm process engine (logfile).bat** file to start the install. Using that file will generate a detailed installation log file. You can send this log file to Bluespring Support for assistance.



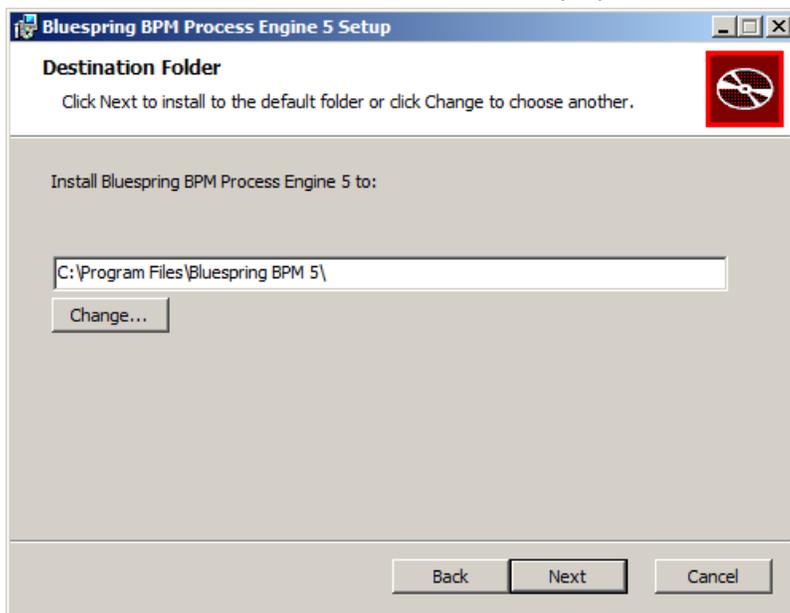
2. Click **Next**. The **End-User License Agreement** screen is displayed.



3. After reading the agreement, select the **I accept the terms in the License Agreement** check box.

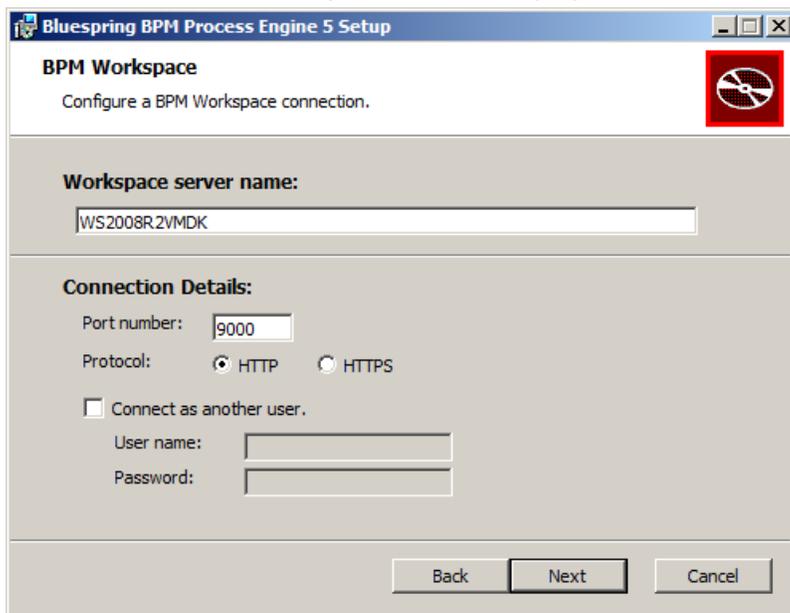


- Click **Next**. The **Destination Folder** screen is displayed.



Note: If you want to choose a different destination folder, click **Change** and select the folder where you want to store the BPM Process Engine files.

- Click **Next**. The **BPM Workspace** screen is displayed.



- In the **Workspace server name:** field, type the name of the server hosting your Workspace service.
- In the **Port number** field, type the Workspace Service's Port Number.

Note: The port number you enter here should be the same port number you entered on the HTTP Server screen in the Workspace Service install.

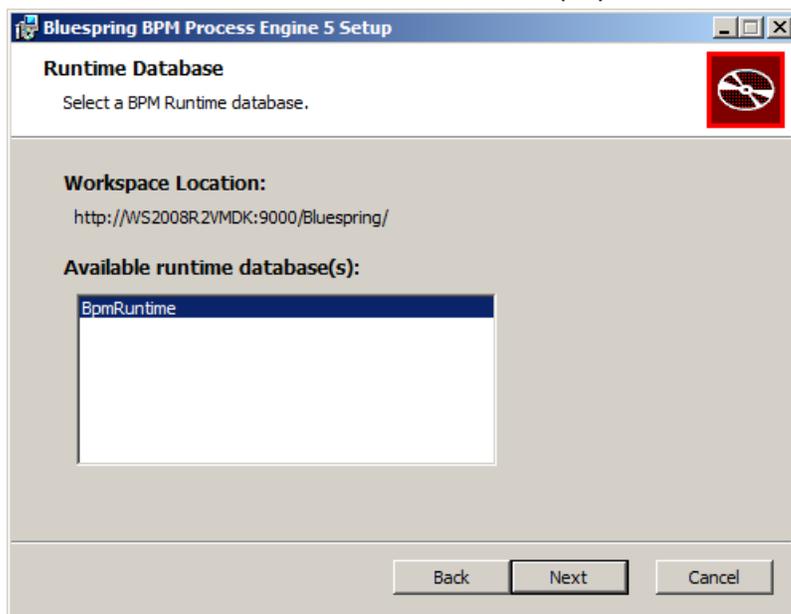
8. Select the Protocol (HTTP or HTTPS) that is used by the Workspace Service.

Optionally, to connect as another user, complete the following steps:

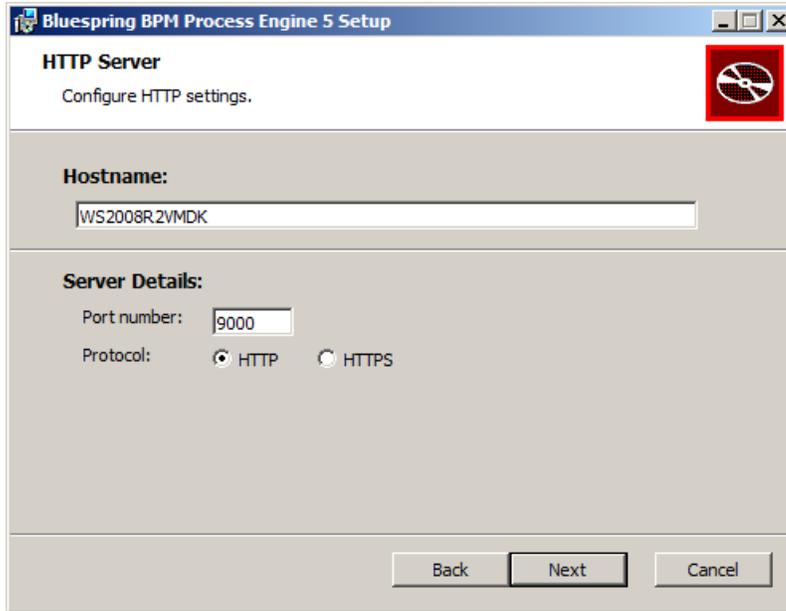
- Select the **Connect as another user** checkbox.
- Type the User name and Password of a domain user that is a member of the Local Administrators group on the server hosting the File Monitor service.

Note: By default, the Process Engine service will connect to the Workspace Service using the Local System account. The Local System account does not have permission to access the Workspace Service when it is hosted on a remote server.

9. Click **Next**. The **Runtime Database** screen is displayed.



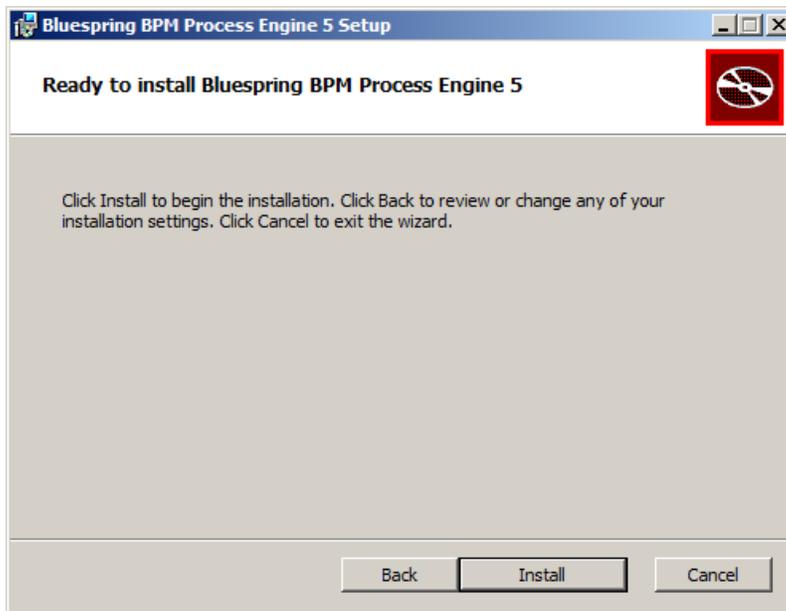
10. From the **Available runtime database(s)** list, select the Runtime Database that you created in the section **Creating a Runtime Database**.
11. Click **Next**. The **HTTP Server** screen is displayed.



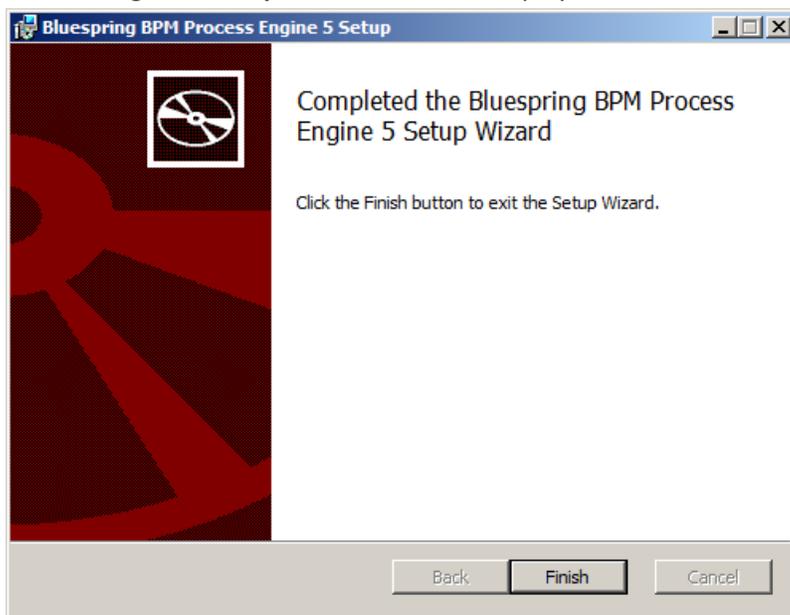
12. In the **Hostname:** field, type the name of your host server.
13. In the **Server Details** fields:
 - a. Type the port number in the **Port number** field. The Process Engine Service will listen for requests on this port.

Note: Port 9000 is the default port used by BPM 5's services; however, you can change the port number if port 9000 is used by another application.

 - b. Select **HTTP** from the **Protocol** options. You select HTTP to transmit unencrypted data and HTTPS to transmit encrypted data.
14. Click **Next**. The **Ready to install Bluespring BPM Process Engine 5** screen is displayed.



- Click **Install**. The installation begins. When complete, the **Completed the Bluespring BPM Process Engine 5 Setup Wizard** screen is displayed.



- Click **Finish**. You installed the Bluespring BPM Process Engine 5 and now you have to activate the service for it to properly function. Please see the next section, **Activating the BPM Process Engine 5 Installation**.

Activating the BPM Process Engine 5 Installation

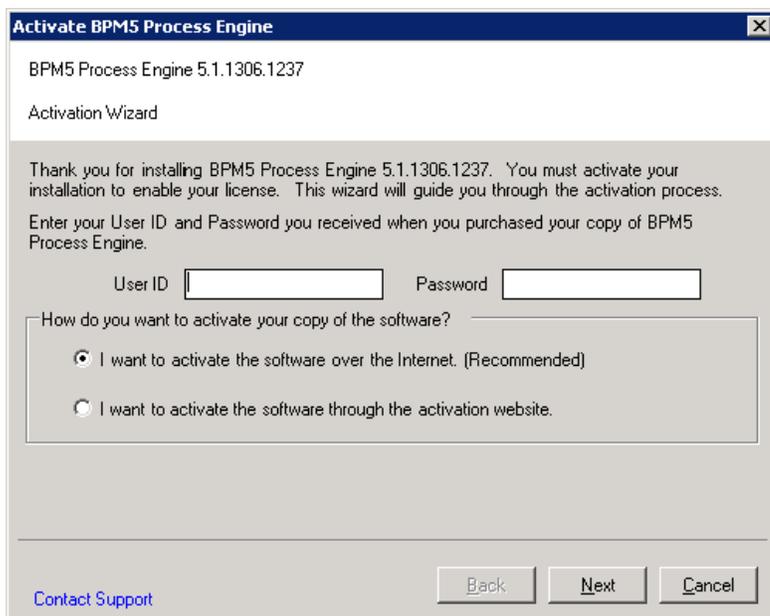
When the Process Engine install completes you will be prompted to activate BPM Process Engine 5. To activate you will need either your Trial or Full license credentials provided by Bluespring.

Note: If you do not have Internet access on the server, access the activation website from another location to retrieve your activation code. See **Appendix F** for further instructions.

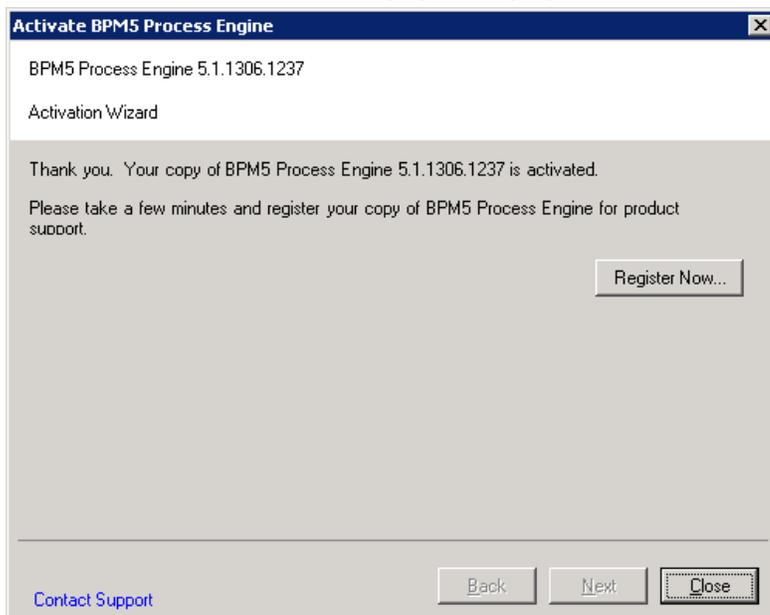
To activate your Process Engine, complete the following steps:

- In the **User ID** field of the **Activate BPM5 Process Engine** window, enter the User ID from the license you received from Bluespring. The User ID will be a series of numbers (Example: 1234).
- In the **Password** field, enter the password associated with the User ID you received from Bluespring.

Note: By default, the **I want to activate the software over the internet** option is selected.

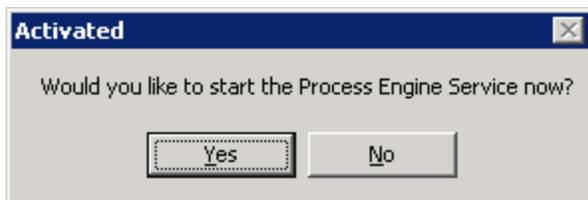


3. Click **Next**. The activation status page is displayed.



Note: Registration is optional. If you do not want to register your copy of the service, skip to step 4.

4. Click **Close** in the **Activate BPM5 Process Engine** window. The **Activated** window is displayed indicating you successfully activated BPM5 Process Engine through the internet and now you want to start the Process Engine service.



5. Click **Yes** to start the Process Engine Service. You started the Process Engine Service.

Verifying the BPM Process Engine 5 Installation

Verify that your installation was successful by checking for errors in the service’s log file or by checking the service’s status in the Services utility or both.

To check for errors in the Bluespring Process Engine log file, complete the following steps:

1. Navigate to the Process Engine folder. This is the folder you selected as the destination folder in step 4 of Installing the BPM Process Engine.
2. Open the Bluespring Process Engine Service log file (**Bluespring.ProcessEngine.log**).
You should not see any errors and see lines similar to the following lines:
 - 2010-06-19 07:03:37 Engine: Start [CALLED]
 - 2010-06-19 07:03:37 Engine: StartAllPlugins [CALLED]

To check the installation status in the Services utility, complete the following steps:

1. From the **Start** menu, select **Administrative Tools** and then select **Services**.
2. In the **Services** window, select **Bluespring Process Engine**. The status of the selected service is displayed as **Started** under the **Status** column.

Note: If the installation is successful, the status will be displayed as **Started**.

Installing BPM File Monitor Service

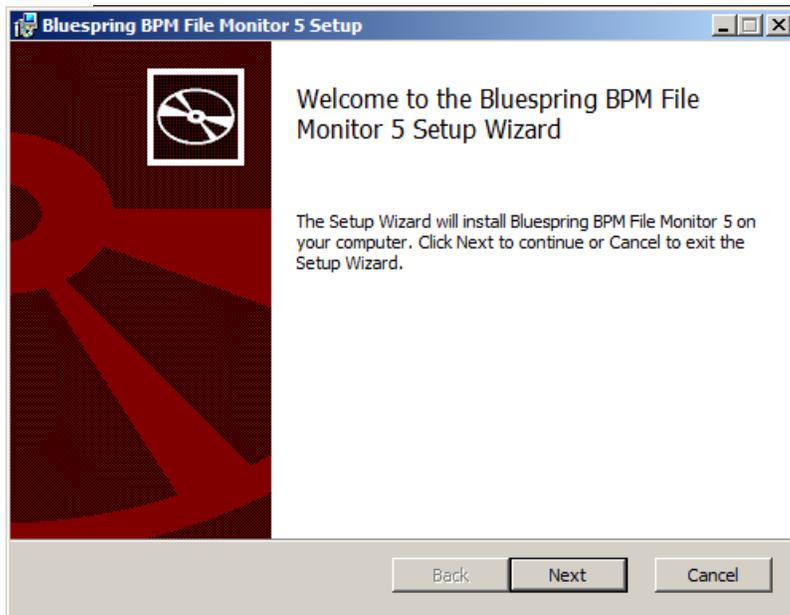
The BPM File Monitor Service is a Windows service used to monitor file shares for file events. When a file event occurs, the BPM File Monitor Service will start an instance of a process in BPM. The process started will include the Receive File Monitor Event activity and be configured to use the File Monitor Service System Resource.

The File Monitor Service can be installed on the server hosting your other BPM 5 services; however, Bluespring recommends installing the service on the server that contains the directory or folder being monitored. Network latency may cause undesired results if the File Monitor service is monitoring a network folder or directory not available on the File Monitor service's server.

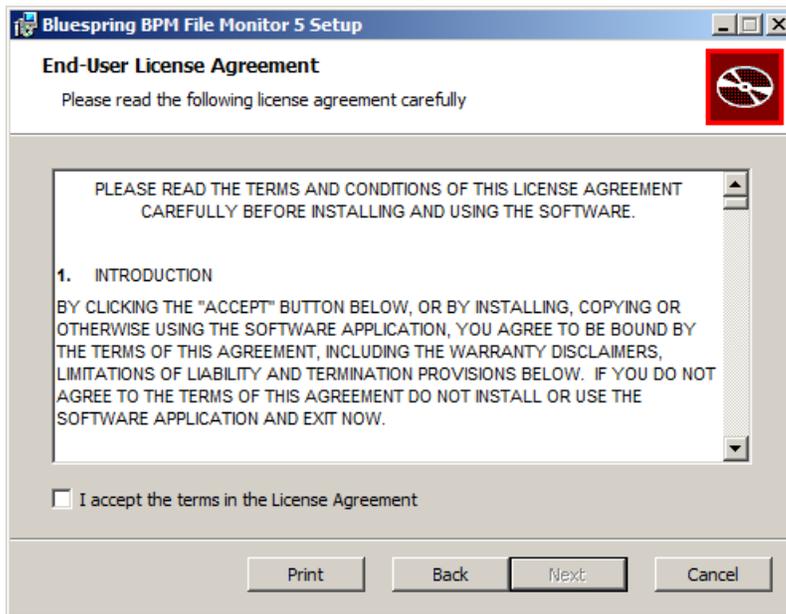
To install the BPM File Monitor Service, complete the following steps:

1. Double-click the BPM File Monitor Service setup file (**bpm file monitor service.msi**). The **Bluespring BPM File Monitor 5 Setup Wizard** is displayed.

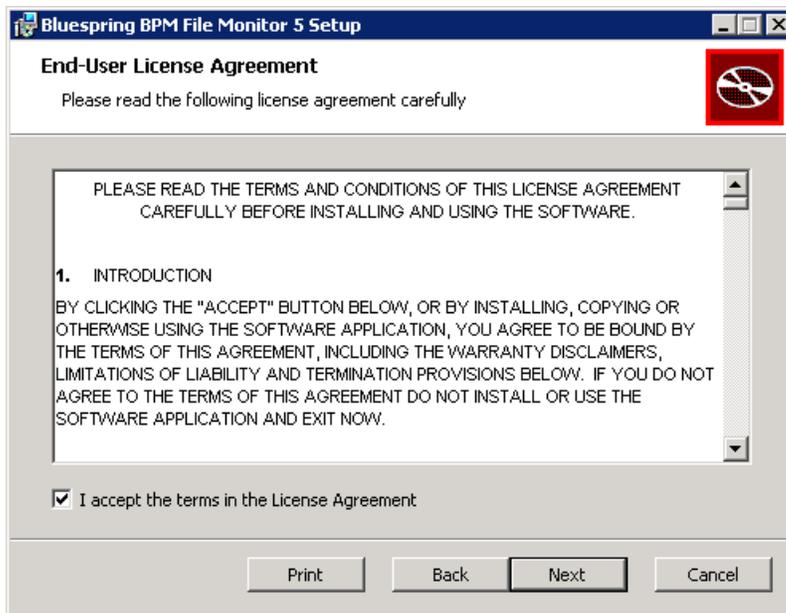
Note: If you encounter an error during the install, please retry, but double-click the **bpm file monitor service (logfile).bat** file to start the install. Using the install file will generate a detailed installation log file. You can send this log file to Bluespring Support for assistance.



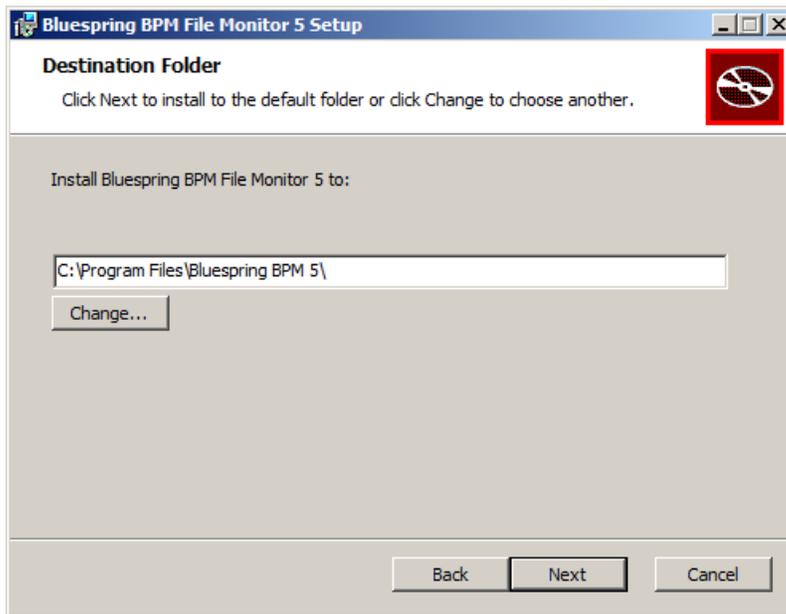
2. Click **Next**. The **End-User License Agreement** screen is displayed.



3. After reading the agreement, select the **I accept the terms in the License Agreement** check box.

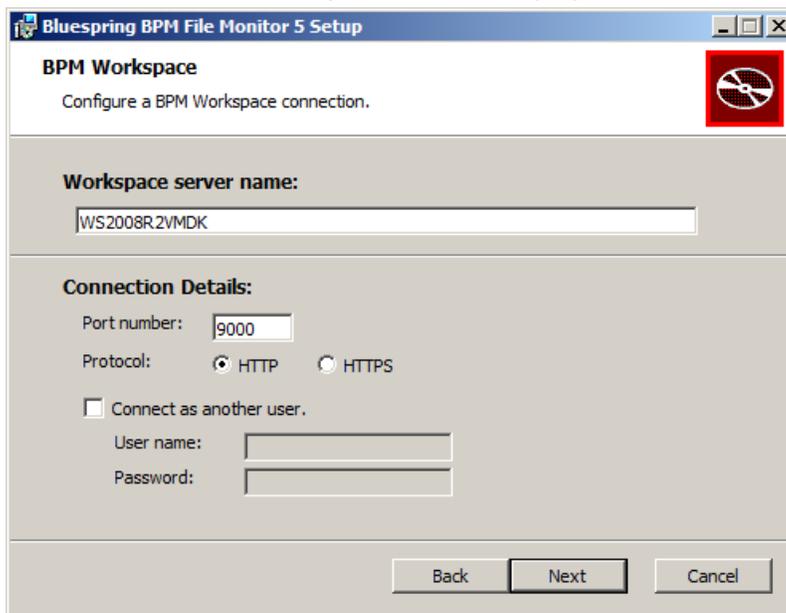


- Click **Next**. The **Destination Folder** screen is displayed.



Note: If you want to choose a different destination folder, click **Change** and select the folder where you want to store the BPM File Monitor Service files.

- Click **Next**. The **BPM Workspace** screen is displayed.



- In the **Workspace server name** field, type the name of the server hosting your Workspace service.
- In the **Port number** field, type the Workspace Service's Port Number.

Note: The port number you enter here should be the same port number you entered on the HTTP Server screen in the Workspace Service install.

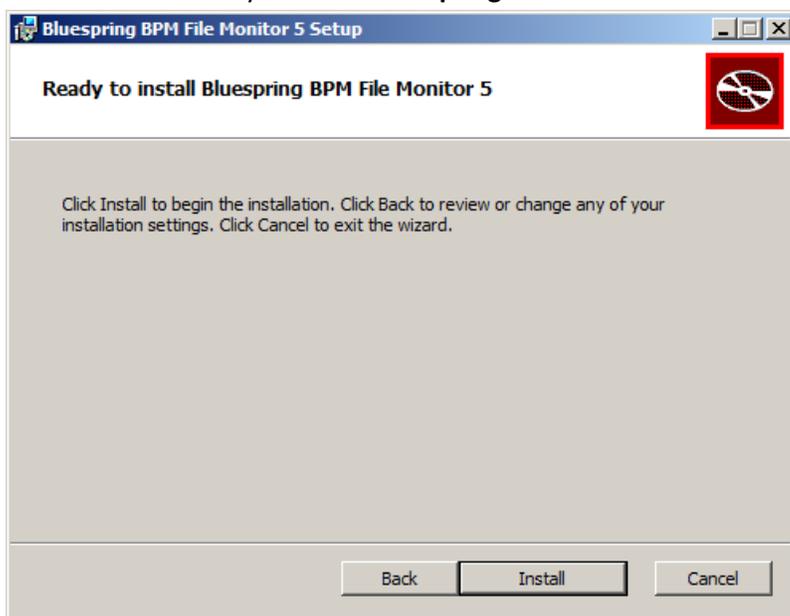
8. Select the Protocol (HTTP or HTTPS) that is used by the Workspace Service.

Optionally, to connect as another user, complete the following steps:

- Select the **Connect as another user** checkbox.
- Type the User name and Password of a domain user that is a member of the Local Administrators group on the server hosting the File Monitor service.

Note: By default, the File Monitor service will connect to the Workspace Service using the Local System account. The Local System account does not have permission to access the Workspace Service when it is hosted on a remote server.

9. Click **Next**. The Ready to install **Bluespring BPM File Monitor 5** screen is displayed.



- Click **Install**. The installation begins. When complete, the **Completed the Bluespring BPM File Monitor 5 Setup Wizard** screen is displayed.



- Click **Finish**. You installed the Bluespring BPM File Monitor 5.

Verifying the BPM File Monitor Installation

Verify that your installation was successful by checking the service's status in the Services utility.

To check the installation status in the Services utility, complete the following steps:

- From the **Start** menu, select **Administrative Tools** and then select Services.
- In the **Services** window, select Bluespring File Monitor. The status of the selected service is displayed as Started under the Status column.

Note: If the installation is successful, the status will be displayed as **Started**.

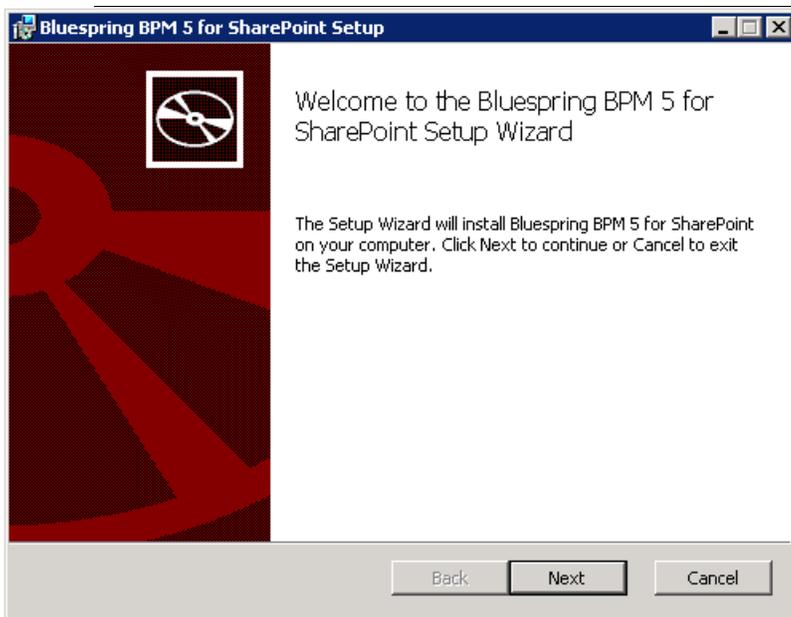
Installing the BPM 5 for SharePoint Service

The BPM SharePoint Service is a Windows service running on your BPM Server, which enables communication between SharePoint and BPM services.

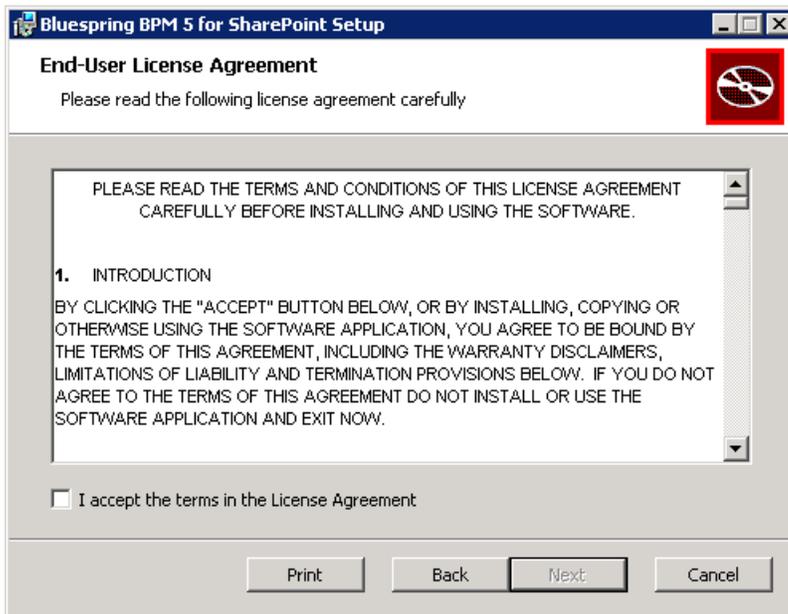
To install the BPM SharePoint Service, complete the following steps:

1. Double-click the BPM SharePoint 5 setup file (bpm sharepoint.msi). The Bluespring BPM SharePoint 5 Setup Wizard is displayed.

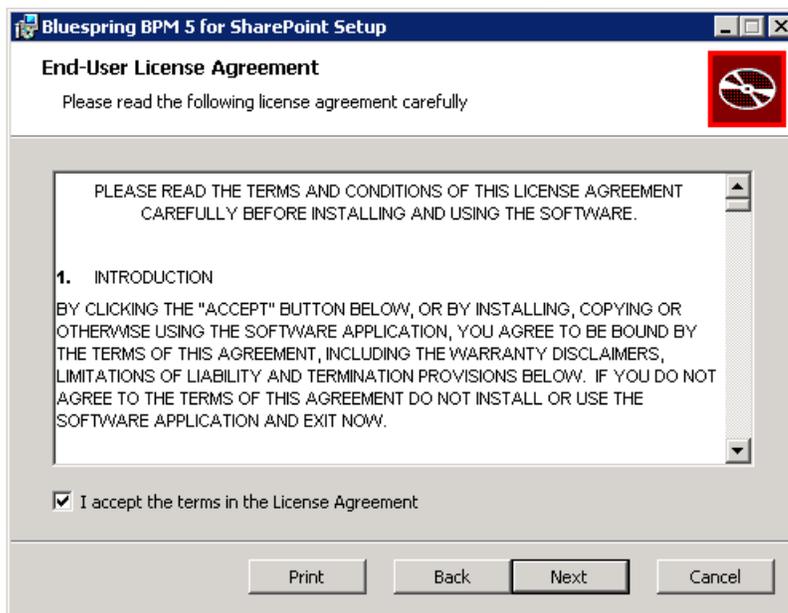
Note: If you encounter an error during the install, please retry the install, but double-click the **bpm sharepoint (logfile).bat** file to start the install. Using that file will generate a detailed installation log file. You can send this log file to Bluespring Support for assistance.



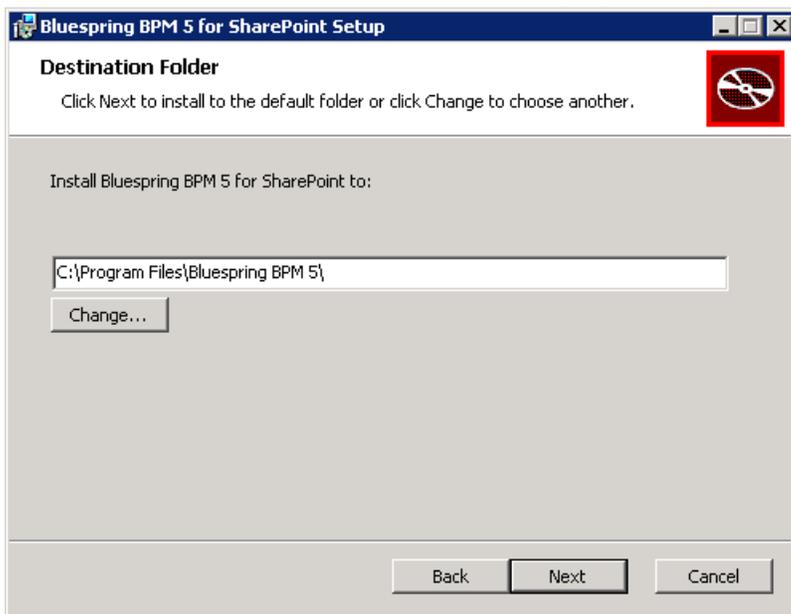
2. Click **Next**. The **End-User License Agreement** screen is displayed.



3. After reading the agreement, select the **I accept the terms in the License Agreement** check box.

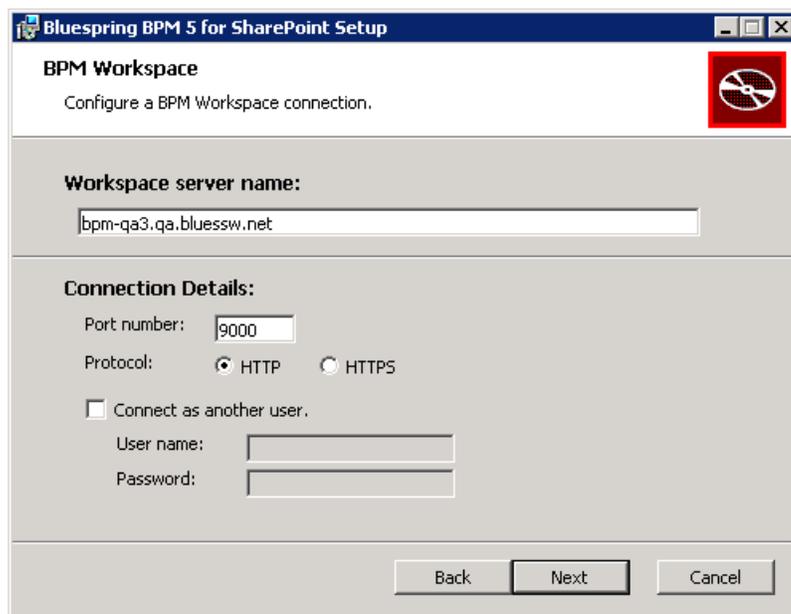


- Click **Next**. The **Destination Folder** screen is displayed.



Note: If you want to choose a different destination folder, click **Change** and select the folder where you want to store the BPM SharePoint Service files.

- Click **Next**. The **BPM Workspace** screen is displayed



- In the **Port number** field, type the Workspace Service's Port Number.

Note: The port number you enter here should be the same port number you entered on the HTTP Server screen in the Workspace Service install.

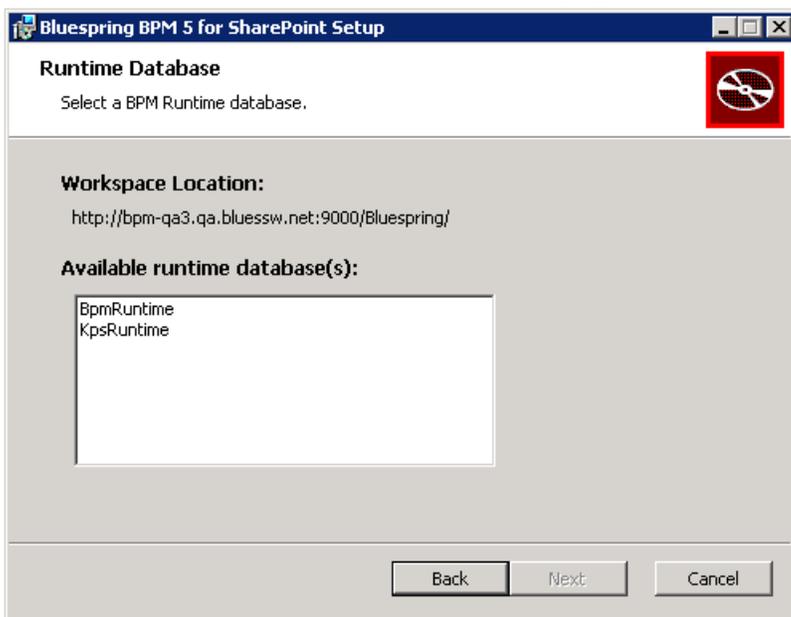
- Select the Protocol (HTTP or HTTPS) that is used by the Workspace Service.

Optionally, to connect as another user, complete the following steps:

- Select the Connect as another user checkbox.
- Type the User name and Password of a domain user that is a member of the Local Administrators group on the server hosting the SharePoint service.

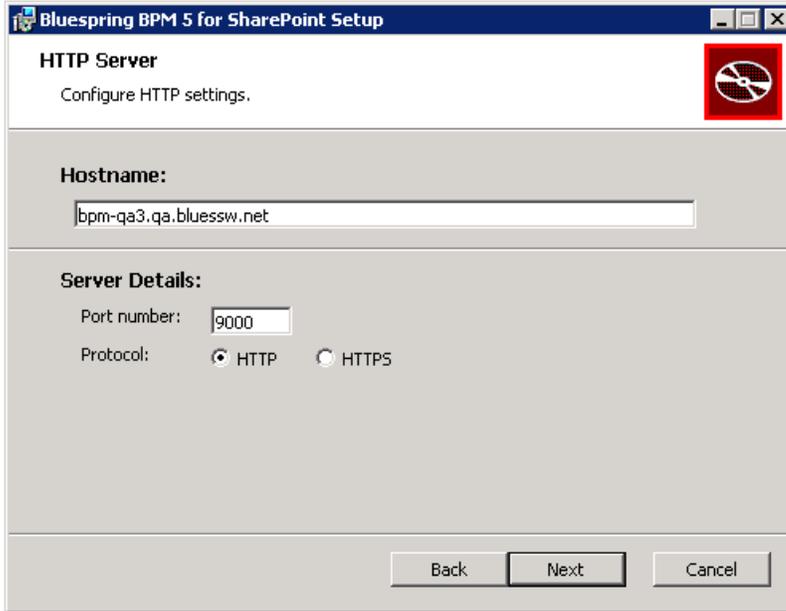
Note: By default, the SharePoint service will connect to the Workspace Service using the Local System account. The Local System account does not have permission to access the Workspace Service when it is hosted on a remote server.

8. Click **Next**. The **Runtime Database** screen is displayed



9. From the **Available runtime database(s)** list, select the Runtime Database that you created in the section **Creating a Runtime Database**.

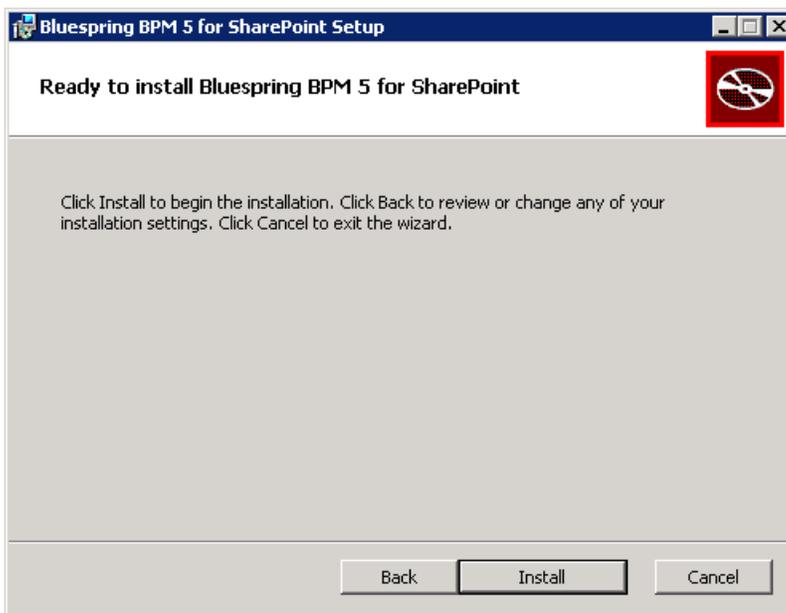
10. Click **Next**. The **HTTP Server** screen is displayed



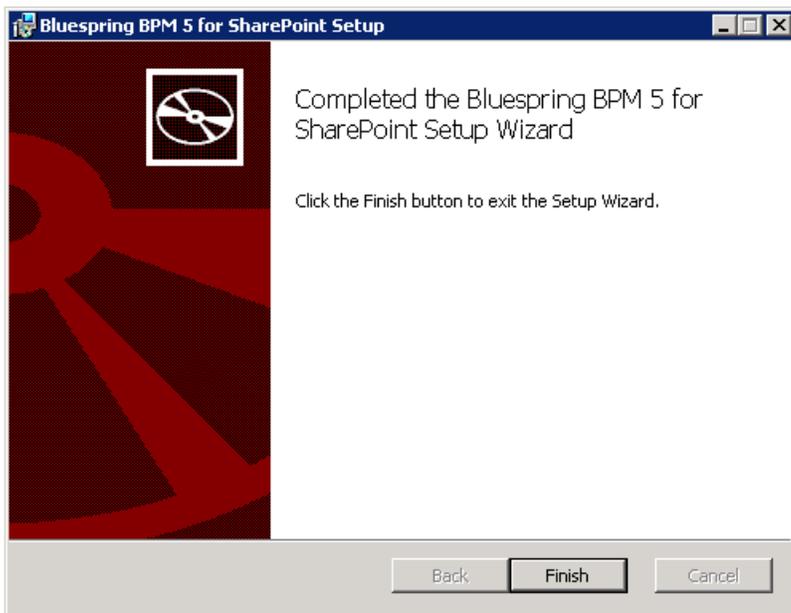
11. In the **Hostname** field, type the name of your host server.
12. In the **Server Details** fields:
 - a. Type the port number in the **Port number** field. The Process Engine Service will listen for requests on this port.

Note: Port 9000 is the default port used by BPM 5's services; however, you can change the port number if port 9000 is used by another application.

 - b. Select **HTTP** from the **Protocol** options. You select HTTP to transmit unencrypted data and HTTPS to transmit encrypted data.
13. Click **Next**. The **Ready to Install Bluespring BPM SharePoint 5** screen is displayed.



- Click **Install**. The installation begins. When complete, the **Completed the Bluespring BPM SharePoint 5 Setup Wizard** screen is displayed.



- Click **Finish**. You installed the Bluespring BPM 5 for SharePoint Service.

Verifying the BPM 5 for SharePoint Installation

Verify that the installation was successful by checking the service's status in the Services utility.

To check the installation status in the Services utility, complete the following steps:

- From the **Start** menu, select **Administrative Tools** and then select **Services**.
- In the **Services** window, select **Bluespring SharePoint Service**. The status of the selected service is displayed as **Started** under the **Status** column.

Note: If the installation is successful, the status will be displayed as **Started**.

Deploying the SharePoint Solution

After completing the installation of the Bluespring BPM 5 for SharePoint Service, you must Add the SharePoint Solution package to the SharePoint solution store and Deploy it to your SharePoint site or all SharePoint web applications.

Note: The steps below should be completed only by or under the supervision of your SharePoint Administrator.

The SharePoint Solution Package (.wsp) is located in the **wsp** folder in the BPM 5 for SharePoint Destination folder.

Note: This folder is the destination folder that you selected in Step 4 of the Installing the BPM 5 for SharePoint Service steps.

To deploy the SharePoint Solution Package, complete the following steps:

1. Copy the SharePoint Solution Package, Bluespring.SharePoint.wsp to your SharePoint server(s)
2. Use the SharePoint stsadm command-line tool to Add the SharePoint Solution, Bluespring.SharePoint.wsp, to the SharePoint solution store. For more information, see: [Add-SPSolution](#)
3. Use the SharePoint stsadm command-line tool or Central Administration to Deploy the SharePoint Solution, bluespring.sharepoint.wsp to a site. For more information, see: [Deploy Farm Solutions](#)

Installing CRM 5

The CRM Monitor Service is used to monitor events and actions within Microsoft Dynamics CRM 4.0. The monitor will start a process when following a CRM event and pass data about the entity to the process.

To install BPM CRM Monitor Service, complete the following steps:

1. Double-click the BPM Designer 5 setup file (**bpm crmservice.msi**). The **Bluespring BPM CRM 5 Setup Wizard** is displayed.

Note: If you encounter an error during the install, please retry, but double-click the **bpm crm service (logfile).bat** file to start the install. Using the install file will generate a detailed installation log file. You can send this log file to Bluespring Support for assistance.

2. Click **Next**. The **End-User License Agreement** screen is displayed.
3. After reading the agreement, select **I accept the terms in the License Agreement** check box.
4. Click **Next**. The **Destination Folder** screen is displayed.

Note: If you want to choose a different destination folder, click **Change** and select the folder where you want to store the BPM Designer files.

5. Click **Next**. The **BPM Workspace** screen is displayed.
6. In the **Port number** field, type the Workspace Service's Port Number.

Note: The port number you enter here should be the same port number you entered on the HTTP Server screen in the Workspace Service install.

7. Select the Protocol (HTTP or HTTPS) that is used by the Workspace Service.

Optionally, to connect as another user, complete the following steps:

- Select the Connect as another user checkbox.
- Type the User name and Password of a domain user that is a member of the Local Administrators group on the server hosting the SharePoint service.

Note: By default, the CRM service will connect to the Workspace Service using the Local System account. The Local System account does not have permission to access the Workspace Service when it is hosted on a remote server.

8. Click **Next**. The **HTTP Server** screen is displayed.
9. In the **Hostname** field, type the name of your host server.
10. In the **Server Details** fields:

- a. Type the port number in the **Port number** field. The Process Engine Service will listen for requests on this port.

Note: Port 9000 is the default port used by BPM 5's services; however, you can change the port number if port 9000 is used by another application.

- b. Select **HTTP** from the **Protocol** options. You select HTTP to transmit unencrypted data and HTTPS to transmit encrypted data.
11. Click **Next**. The **Ready to Install Bluespring BPM CRM 5** screen is displayed.
 12. Click **Install**. The installation begins. When complete, the **Completed the Bluespring BPM CRM 5 Setup Wizard** screen is displayed.
 13. Click **Finish**. You installed the Bluespring BPM SharePoint 5.

Verifying the BPM CRM 5 Installation

Verify that the installation was successful by checking the service's status in the Services utility.

To check the installation status in the Services utility, complete the following steps:

1. From the **Start** menu, select **Administrative Tools** and then select **Services**.
2. In the **Services** window, select **Bluespring CRM 5**. The status of the selected service is displayed as **Started** under the **Status** column.

Note: If the installation is successful, the status will be displayed as **Started**.

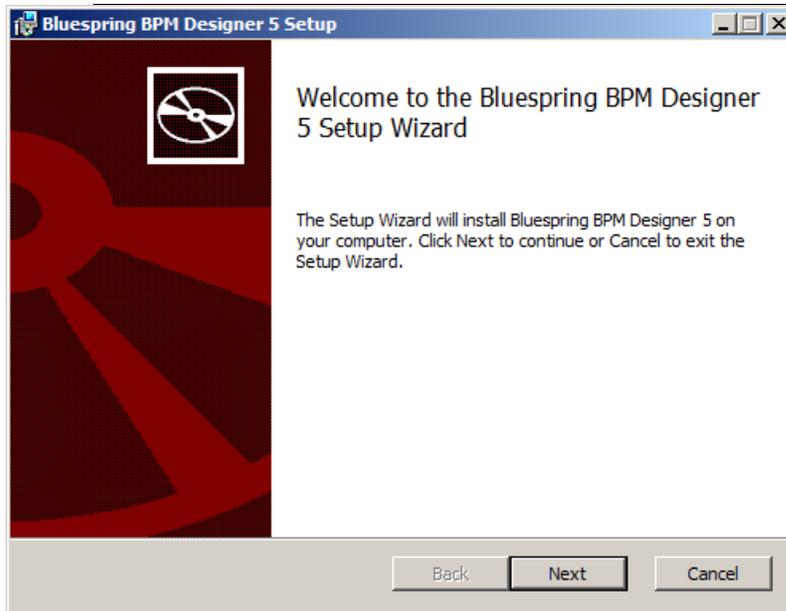
Installing BPM Designer 5

The BPM Designer 5 is an application used to design and configure process solutions. It is typically used by Business and Process Analysts.

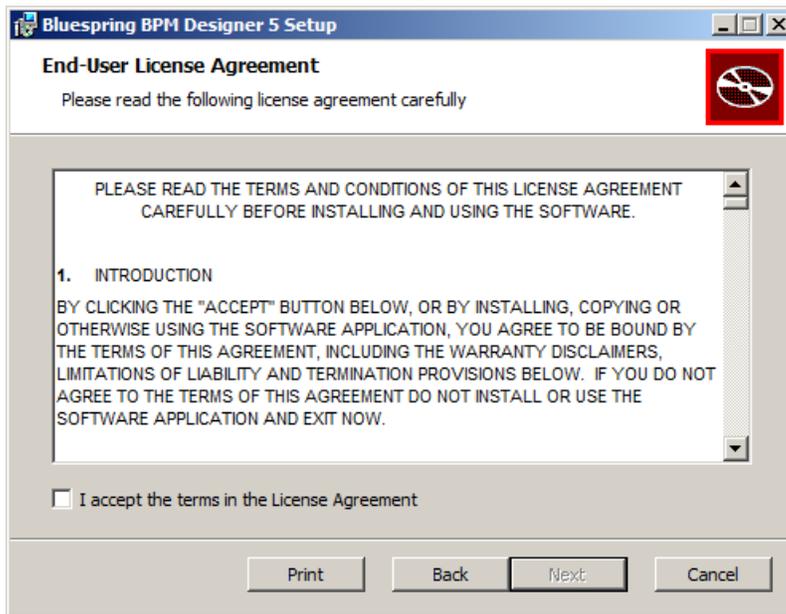
To install the BPM Designer 5, complete the following steps:

1. Double-click the BPM Designer 5 setup file (**bpm designer.msi**). The **Bluespring BPM Designer 5 Setup Wizard** is displayed.

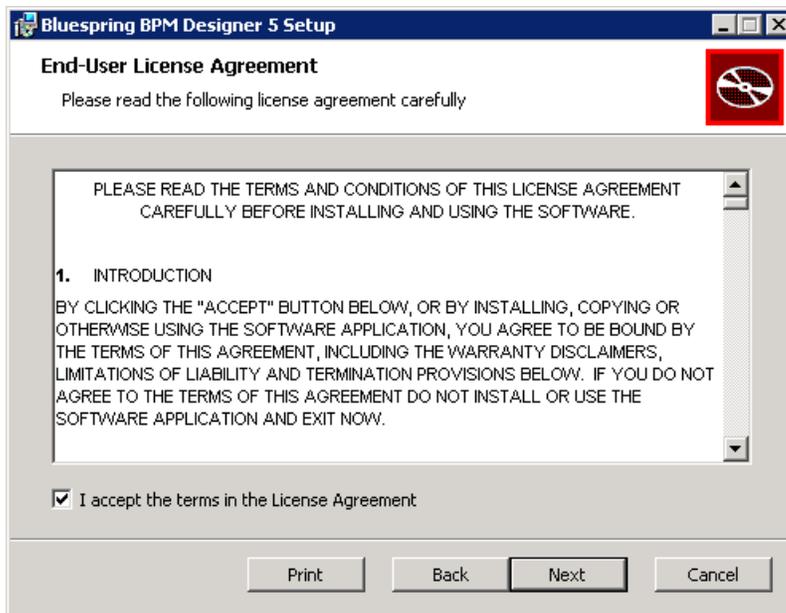
Note: If you encounter an error during the install, please retry, but double-click the **bpm designer (logfile).bat** file to start the install. Using the install file will generate a detailed installation log file. You can send this log file to Bluespring Support for assistance.



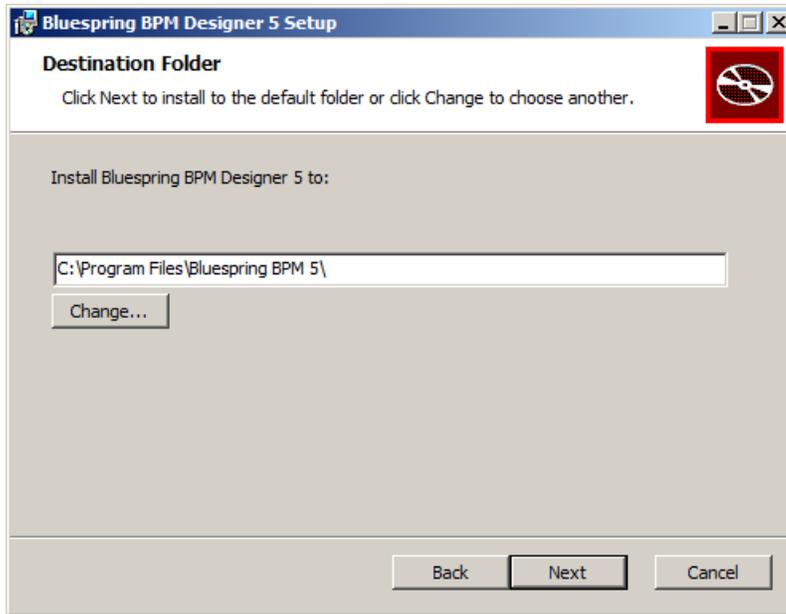
2. Click **Next**. The **End-User License Agreement** screen is displayed.



3. After reading the agreement, select **I accept the terms in the License Agreement** check box.

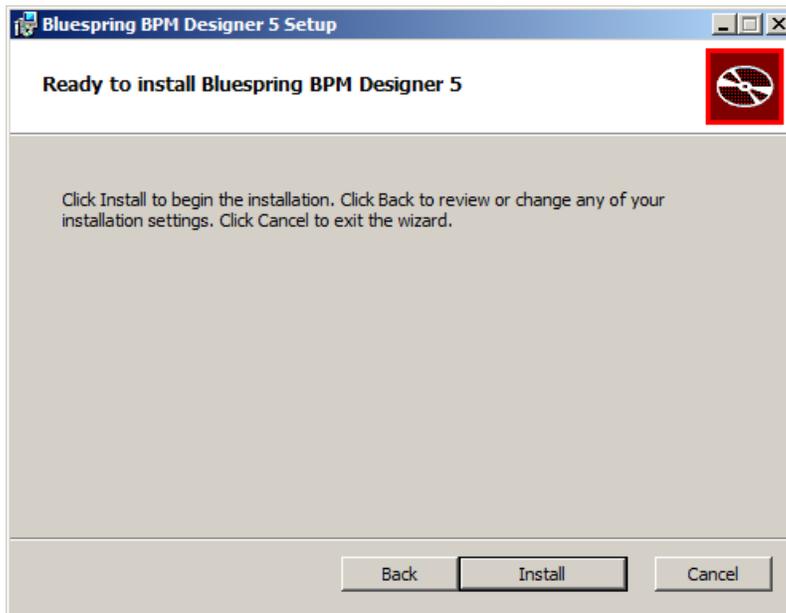


- Click **Next**. The **Destination Folder** screen is displayed.

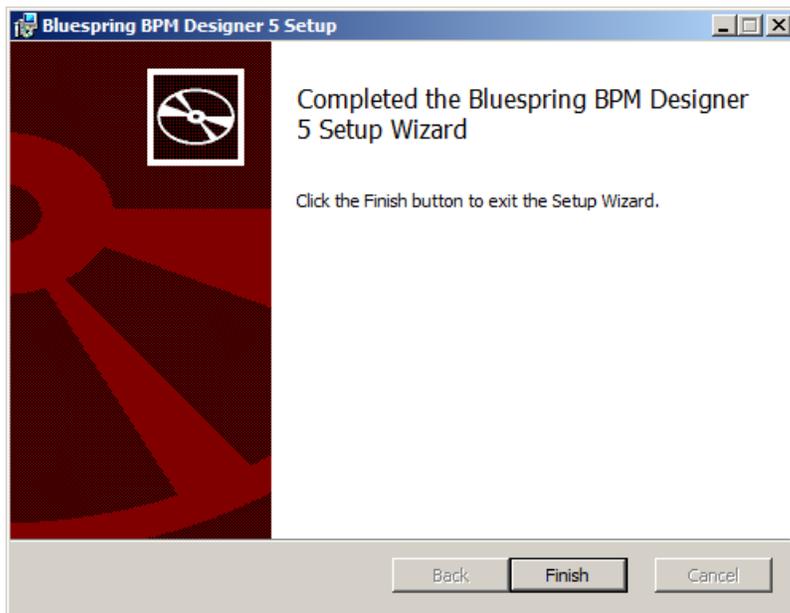


Note: If you want to choose a different destination folder, click **Change** and select the folder where you want to store the BPM Designer files.

- Click **Next**. The **Ready to Install Bluespring BPM Designer 5** screen is displayed.



6. Click **Install**. The installation process begins. When complete, the **Completed the Bluespring BPM Designer 5 Setup Wizard** screen is displayed.



7. Click **Finish**. You installed the Bluespring BPM Designer 5.

Verifying the BPM Designer 5 Installation

Verify that the installation was successful by opening BPM Designer 5 and logging into your workspace.

To open BPM Designer 5 and connect to a workspace, complete the following steps:

1. From the **Start** menu, click **All Programs**. The **All Programs** menu is displayed.
2. Click **Bluespring BPM 5**. The list of installed BPM 5 applications is displayed.
3. Click **BPM Designer 5**. BPM Designer 5 opens and the **Connect to Workspace** window is displayed.
4. Click **Workspaces**. The **Add/Remove Workspace** window is displayed.
5. Click **Add**. The **Add Workspace** window is displayed.
6. Type the following:
 - a. The name of the Workspace server in the Workspace server name field
 - b. The port number in the **Port** field
 - c. The appropriate protocol from the **Protocol** options

Note: The Workspace server name, port number, and the protocol you enter here should be same as those you entered on the HTTP Server screen in the Workspace Service install.

7. Click **OK**.
8. Click **Close**.

9. From the **Connect to a Workspace** drop-down list, select your Workspace.
10. Click **Connect**. The BPM Designer workspace is displayed.
You successfully installed BPM Designer 5 and connected to a workspace.

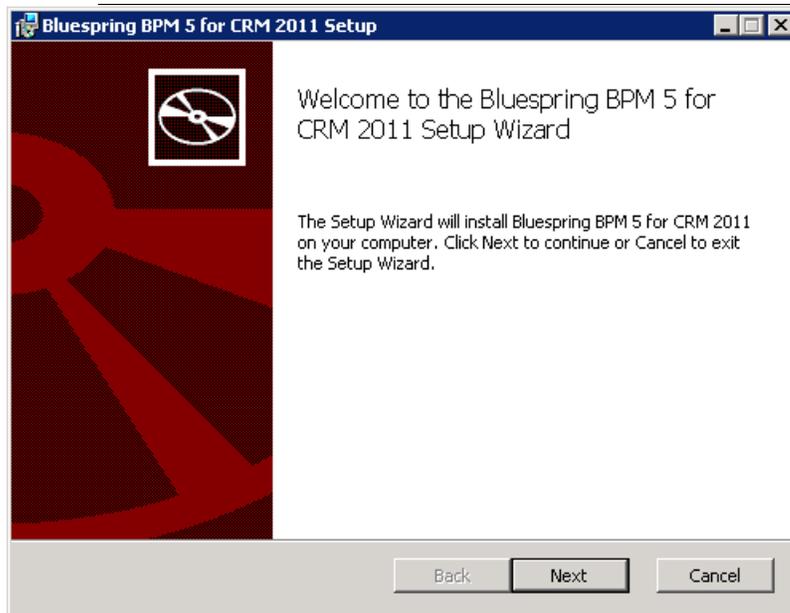
Installing the BPM 5 for CRM 2011 Service

The BPM CRM 2011 Service is a Windows service running on your BPM Server, which enables communication between CRM 2011 and BPM services.

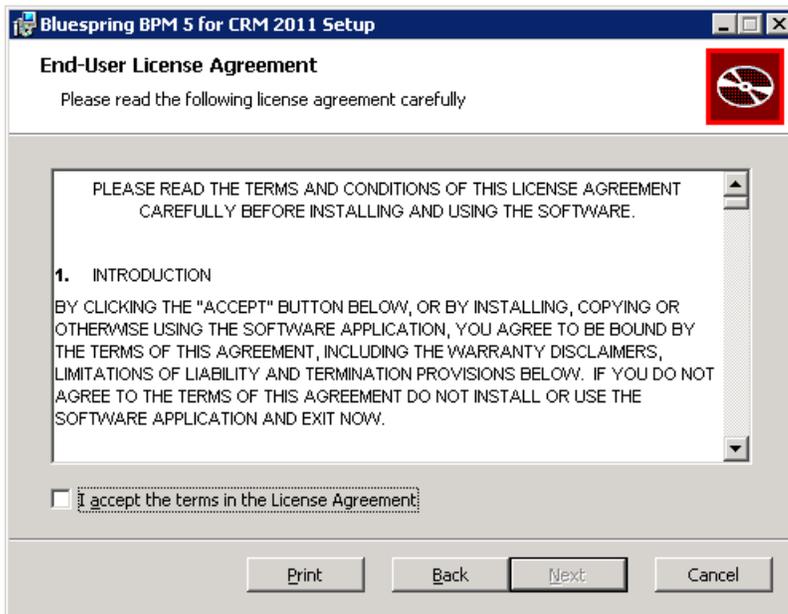
To install the BPM CRM 2011 Service, complete the following steps:

1. Double-click the BPM 5 for CRM 2011 setup file (bpm crm 2011 service.msi). The Bluespring BPM 5 for CRM 2011 Setup Wizard is displayed.

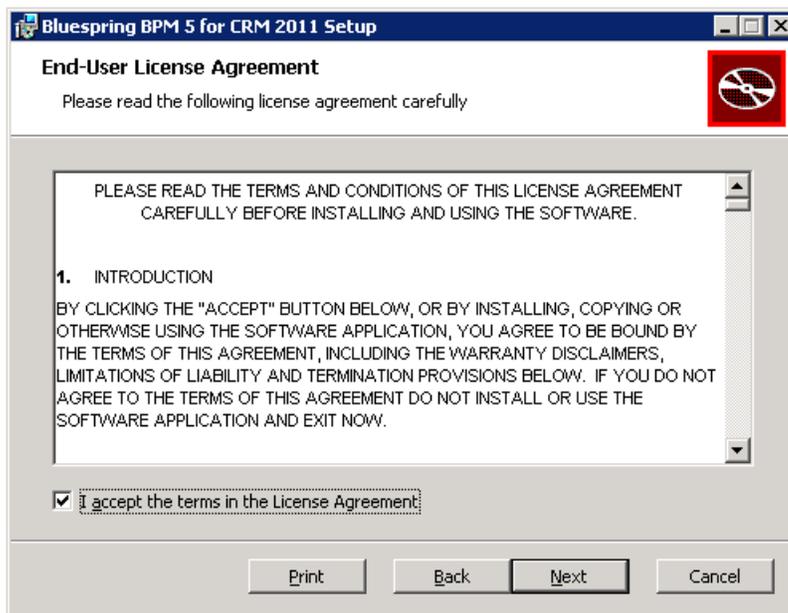
Note: If you encounter an error during the install, please retry the install, but double-click the **bpm sharepoint (logfile).bat** file to start the install. Using that file will generate a detailed installation log file. You can send this log file to Bluespring Support for assistance.



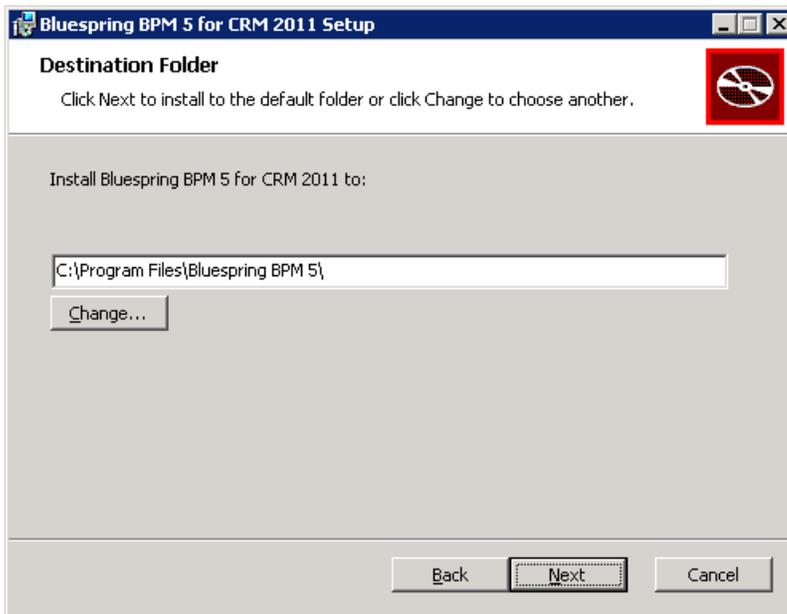
2. Click **Next**. The **End-User License Agreement** screen is displayed.



3. After reading the agreement, select the **I accept the terms in the License Agreement** check box.

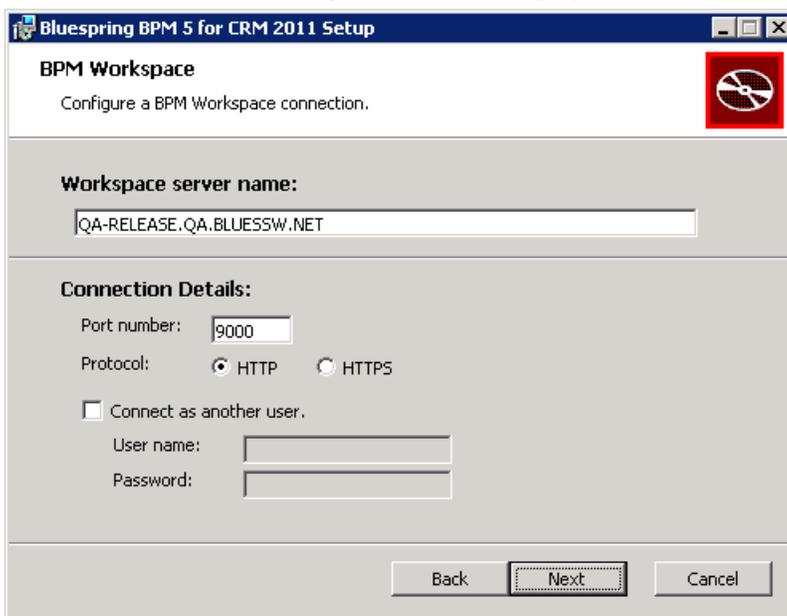


- Click **Next**. The **Destination Folder** screen is displayed.



Note: If you want to choose a different destination folder, click **Change** and select the folder where you want to store the BPM SharePoint Service files.

- Click **Next**. The **BPM Workspace** screen is displayed



- In the **Port number** field, type the Workspace Service's Port Number.

Note: The port number you enter here should be the same port number you entered on the HTTP Server screen in the Workspace Service install.

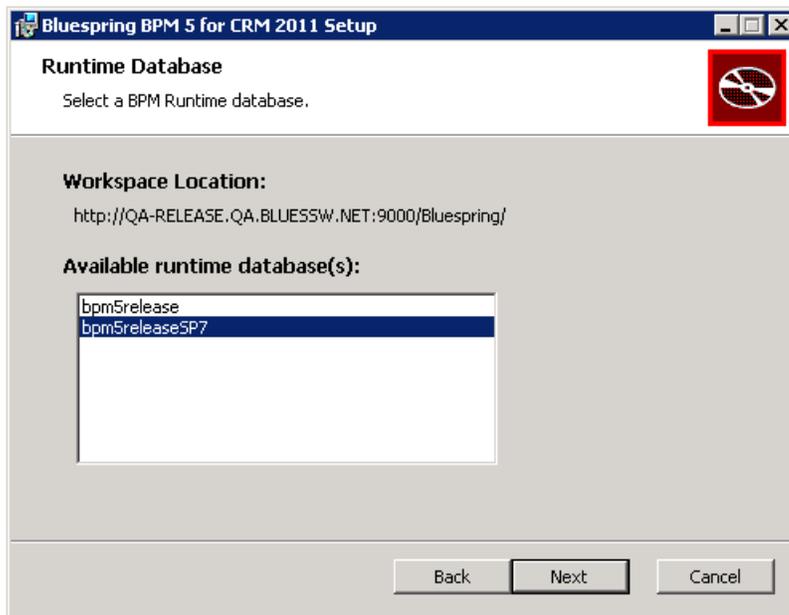
- Select the Protocol (HTTP or HTTPS) that is used by the Workspace Service.

Optionally, to connect as another user, complete the following steps:

- Select the Connect as another user checkbox.
- Type the User name and Password of a domain user that is a member of the Local Administrators group on the server hosting the SharePoint service.

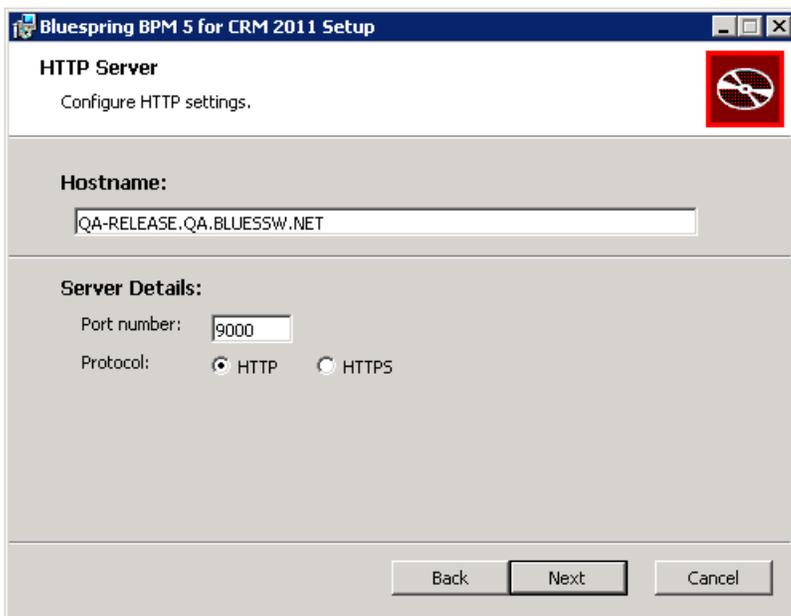
Note: By default, the CRM 2011 service will connect to the Workspace Service using the Local System account. The Local System account does not have permission to access the Workspace Service when it is hosted on a remote server.

8. Click **Next**. The **Runtime Database** screen is displayed



9. From the **Available runtime database(s)** list, select the Runtime Database that you created in the section **Creating a Runtime Database**.

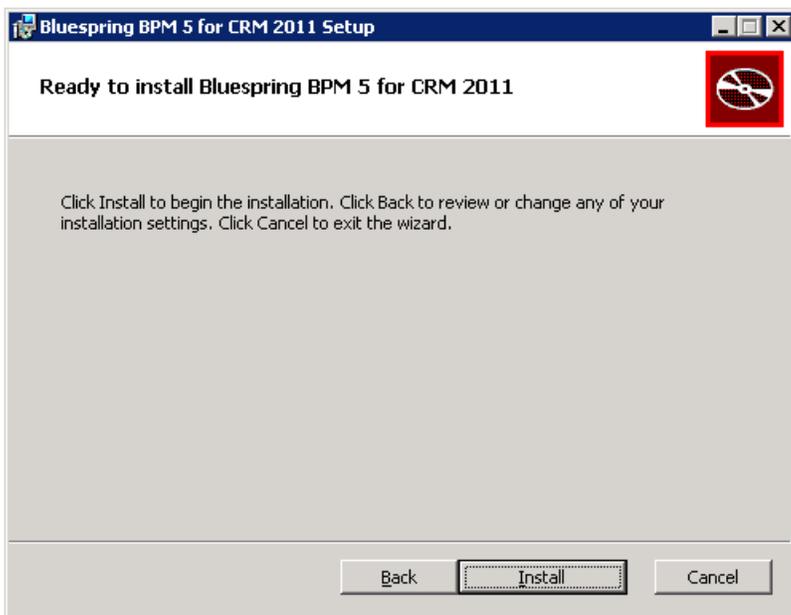
10. Click **Next**. The **HTTP Server** screen is displayed



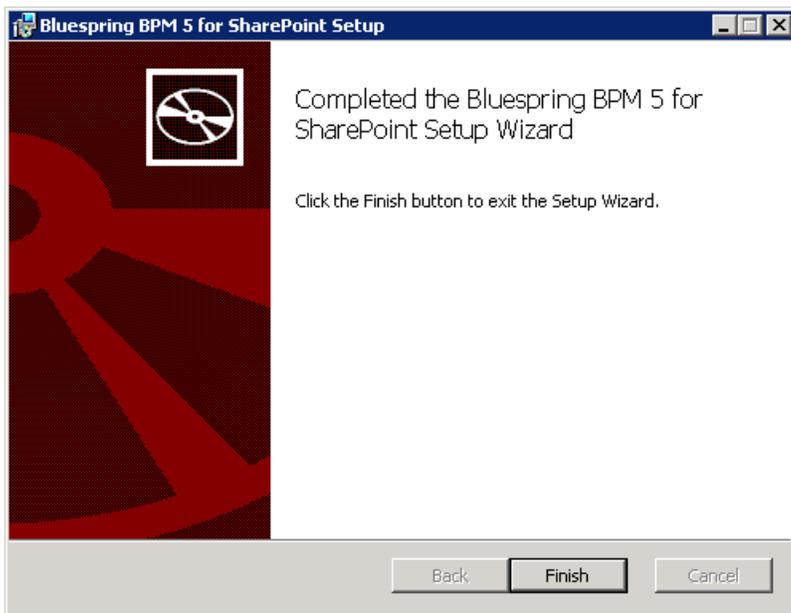
11. In the **Hostname** field, type the name of your host server.
12. In the **Server Details** fields:
 - a. Type the port number in the **Port number** field. The Process Engine Service will listen for requests on this port.

Note: Port 9000 is the default port used by BPM 5's services; however, you can change the port number if port 9000 is used by another application.

 - b. Select **HTTP** from the **Protocol** options. You select HTTP to transmit unencrypted data and HTTPS to transmit encrypted data.
13. Click **Next**. The **Ready to Install Bluespring BPM 5 for CRM 2011** screen is displayed.



14. Click **Install**. The installation begins. When complete, the **Completed the Bluespring BPM SharePoint 5 Setup Wizard** screen is displayed.



15. Click **Finish**. You installed the Bluespring BPM 5 for CRM 2011 Service.

Verifying the BPM 5 for CRM 2011 Installation

Verify that the installation was successful by checking the service's status in the Services utility.

To check the installation status in the Services utility, complete the following steps:

3. From the **Start** menu, select **Administrative Tools** and then select **Services**.
4. In the **Services** window, select **Bluespring CRM 2011 Service**. The status of the selected service is displayed as **Started** under the **Status** column.

Note: If the installation is successful, the status will be displayed as **Started**.

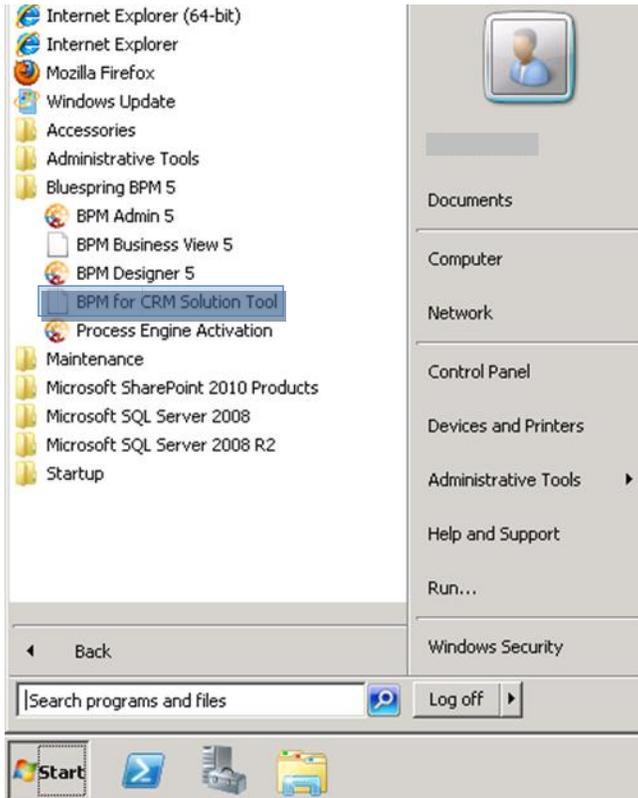
Deploying the CRM 2011 Managed Solution

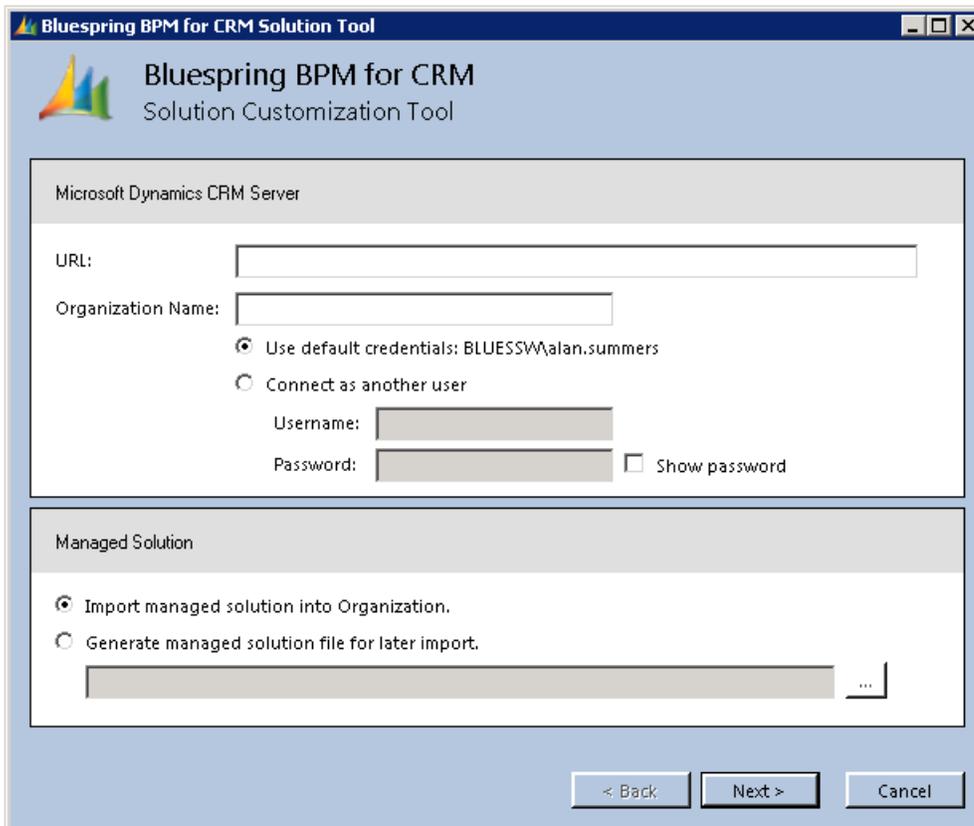
After completing the installation of the Bluespring BPM 5 for CRM 2011 Service, you must Import the CRM 2011 Managed Solution package to your CRM 2011 Organization.

Note: The steps below should be completed in consultation with or under the supervision of your CRM 2011 Administrator.

To import the Managed Solution to your CRM 2011 Organization, use the Bluespring BPM for CRM Solution Tool

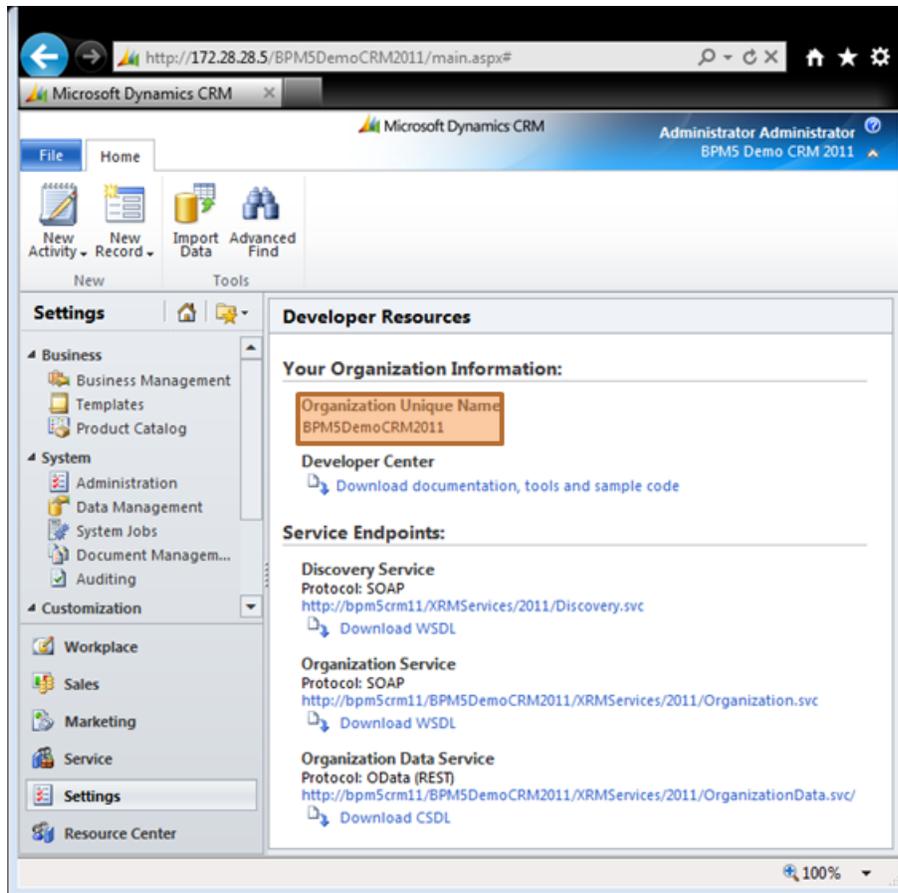
1. Open Start --> All Programs --> Bluespring BPM 5 --> BPM for CRM Solution Tool. The BPM for CRM Solution Tool is displayed





2. In the **URL** field, type the URL for your CRM 2011 deployment
3. In the **Organization Name** field, type the Organization Name for your CRM 2011 deployment displayed.

Note: You can find the Organization Name in CRM 2011 by going to Settings --> Customizations --> Developer Resources



4. Select a User to authenticate to your CRM 2011 deployment

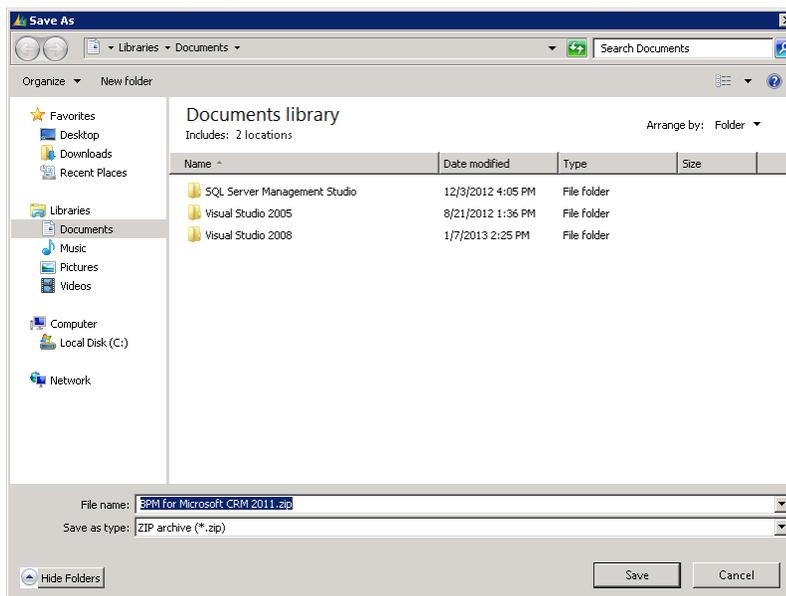
Note: the User specified must be assigned the [Deployment Administrator role](#) in CRM 2011

- a. Use default credentials: <Domain>\<Username>
- b. Connect as another user
 - i. In the **Username** field, type the Username you wish to connect to your CRM 2011 deployment
 - ii. In the **Password** field, type the Password for the Username provided

Note: You may select **Show password** to verify the password provided

5. Select your Action for the CRM Managed Solution
 - a. **Import managed solution into Organization:** imports the Managed Solution: BluespringCrm2011 to the specified deployment of CRM 2011, for all current entities in CRM 2011
 - b. **Generate managed solution file for later import:** creates a zip file to the specified location, which can then be manually imported within CRM 2011
 - i. Specify a location to store the zip file

1. Click on the ellipsis, "...". The **Save As** screen is displayed



2. Navigate to a location, enter a File name and click **Save**

Note: You can then Import the Managed Solution at any time within CRM 2011 via Settings --> Customizations --> Solutions --> Import.

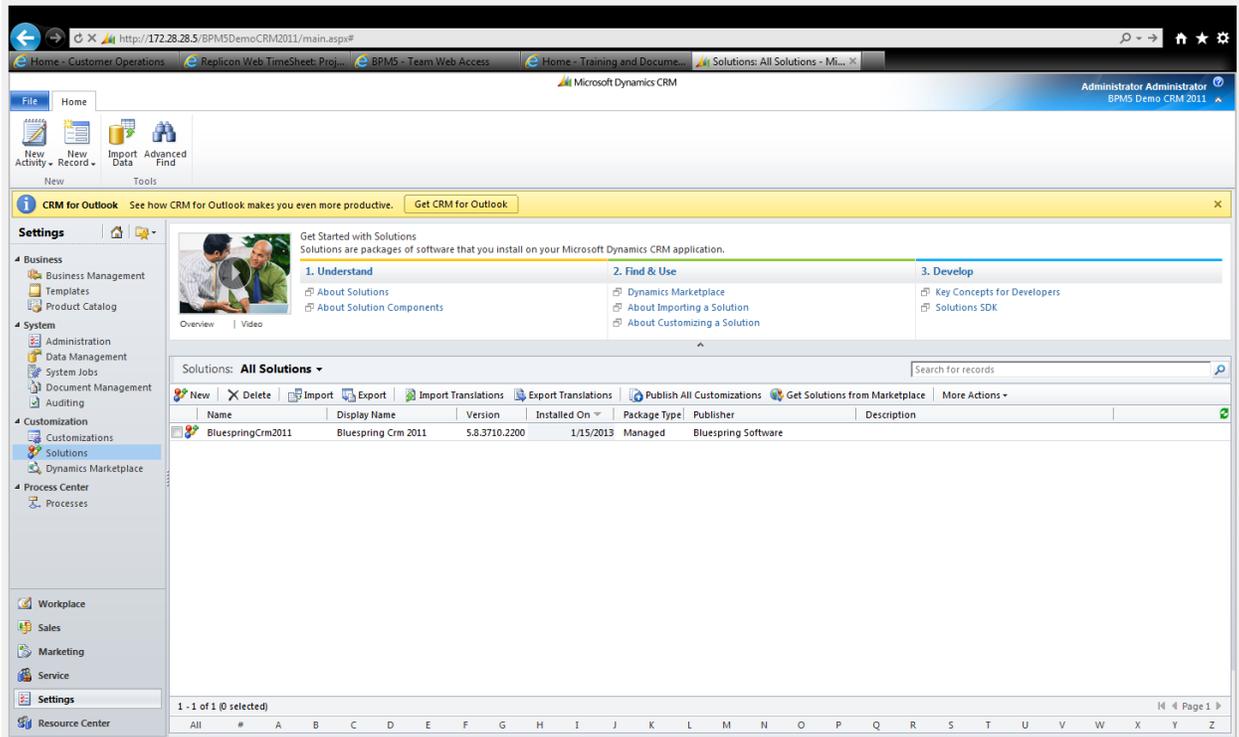
6. Click [Next] to complete the Action selected.

Verifying the BPM 5 for CRM 2011 Managed Solution

Verify that the Managed Solution was successfully imported to CRM 2011 by opening CRM 2011 and located the Solution.

1. Open a browser and navigate to your CRM 2011 deployment
2. Click **Customization**

3. Click **Solutions**. The Solutions store is displayed



4. Confirm the Solution: BluespringCrm2011 appears in the **Managed Solutions** view

Installing BPM Admin 5

The BPM Admin 5 is an application that is used to monitor instances of process solutions. It is used by Bluespring administrators.

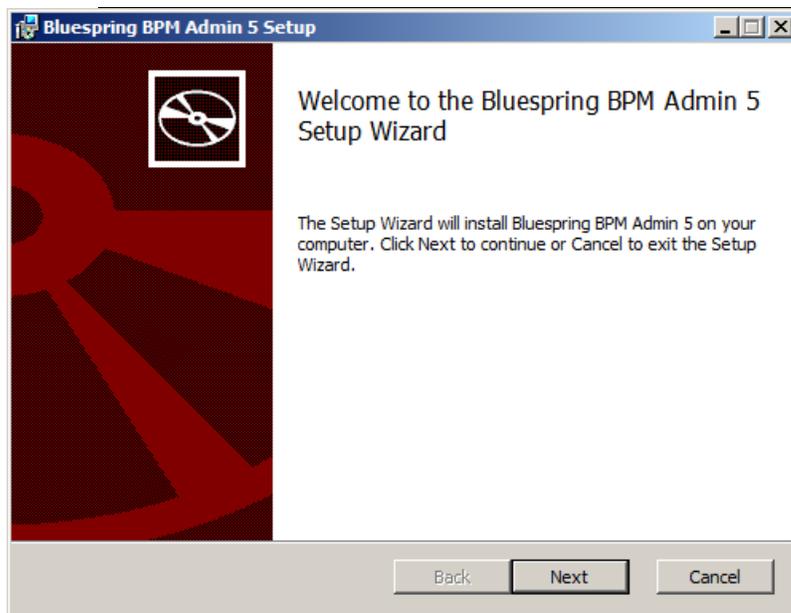
You use BPM Admin to:

- Monitor process instances in a runtime database
- Restart a process or an activity
- Cancel a process or an activity
- View process status
- View subprocesses
- View data item values before and after activity execution
- View activity execution log with informational, warning, and error messages

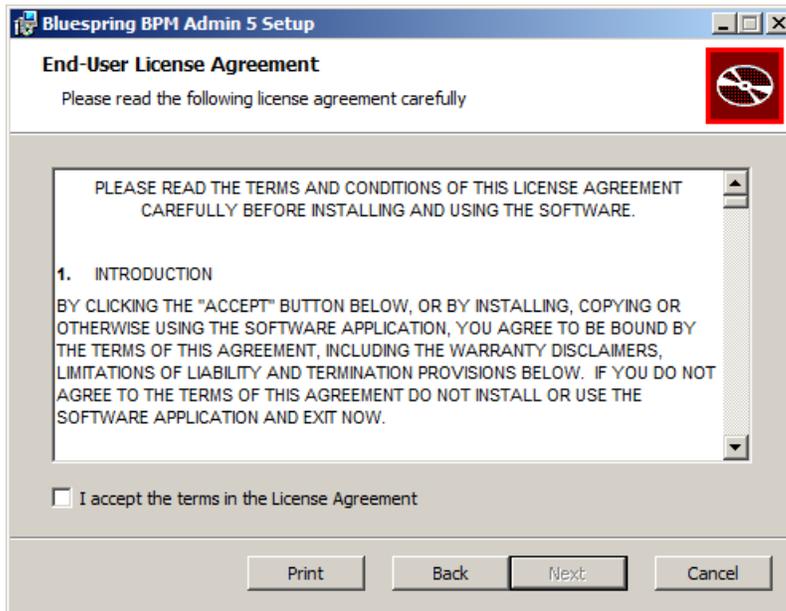
To install the BPM Admin 5, complete the following steps:

1. Double-click the BPM Admin 5 setup file (**bpm admin.msi**). The **Bluespring BPM Admin 5 Setup Wizard** is displayed.

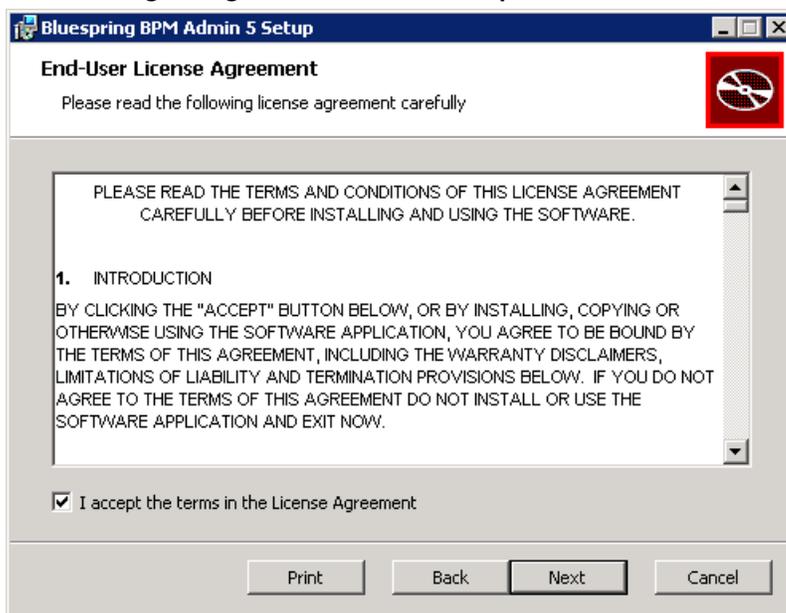
Note: If you encounter an error during the install, please retry, but double-click the **bpm admin (logfile).bat** file to start the install. Using the install file will generate a detailed installation log file. You can send this log file to Bluespring Support for assistance.



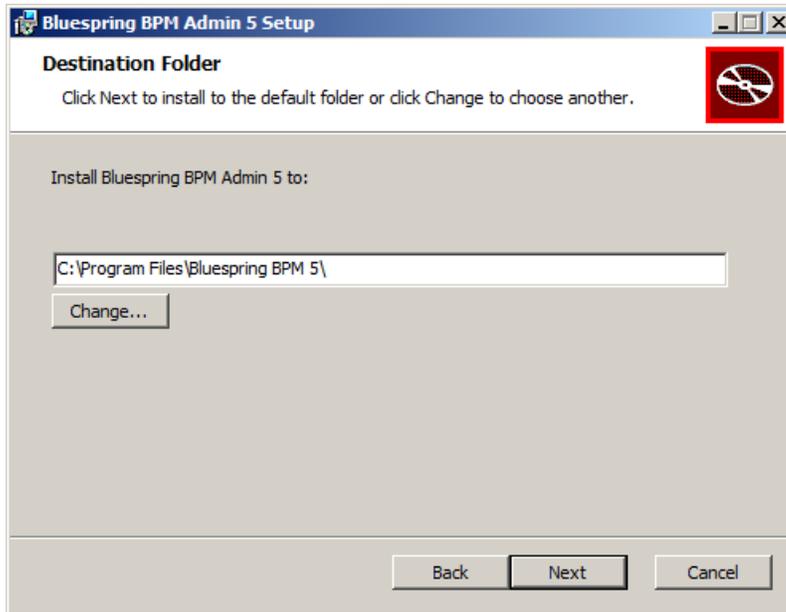
2. Click **Next**. The **End-User License Agreement** screen is displayed.



3. After reading the agreement, select **I accept the terms in the License Agreement** check box.

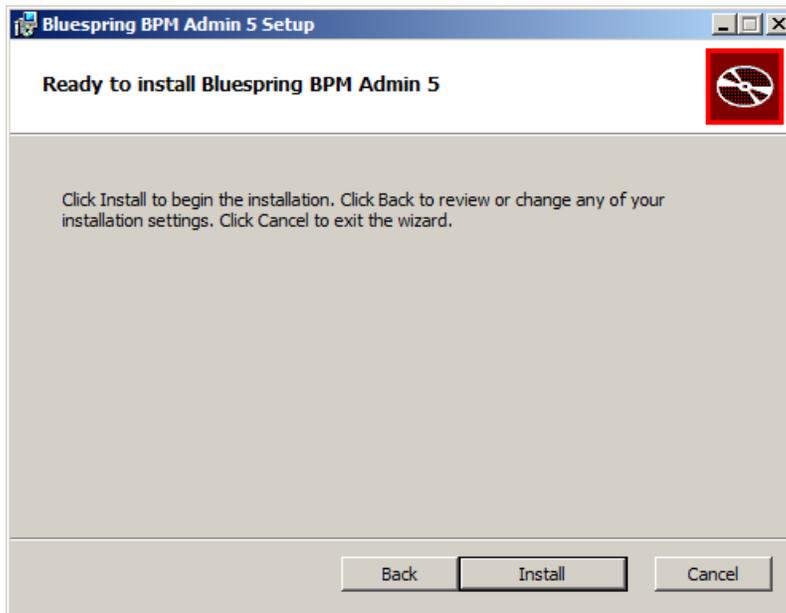


4. Click **Next**. The **Destination Folder** screen is displayed.

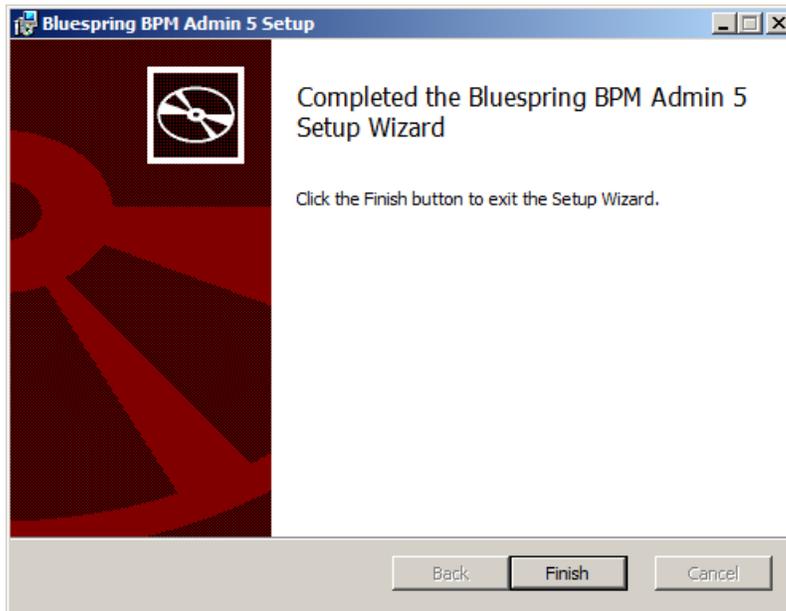


Note: If you want to choose a different destination folder, click **Change** and select the folder where you want to store the BPM Admin files.

5. Click **Next**. The **Ready to Install Bluespring BPM Admin 5** screen is displayed.



6. Click **Install**. The installation begins. When complete, the **Completed the Bluespring BPM Admin 5 Setup Wizard** screen is displayed.



7. Click **Finish**. You installed the BPM Admin 5.

Verifying the BPM Admin 5 Installation

Verify that the installation was successful by opening BPM Admin 5.

1. From the **Start** menu, click **All Programs**. The **All Programs** menu is displayed.
2. Click **Bluespring BPM 5**. The list of installed BPM 5 applications is displayed.
3. Click **BPM Admin 5**. BPM Admin 5 opens.

You successfully completed the installation of Bluespring BPM₅.

Note: In order to save your Workspace in BPM Admin, create a console with the Bluespring Admin Snap-in. Please see Appendix D for further instructions.

Installing the Command Service with BPM₅

Installing the Command Service

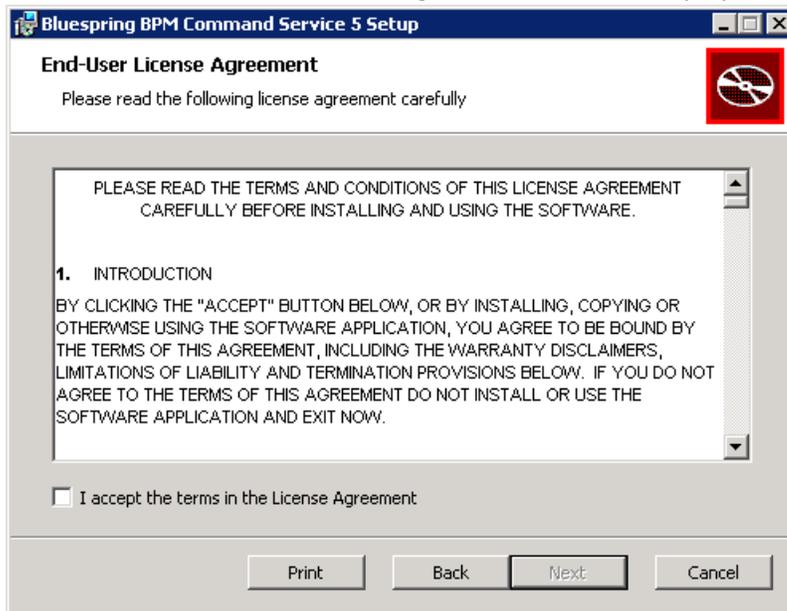
The Bluespring Command Service is a stand-alone Windows Communication Foundation (WCF) Service that exposes the Command Prompt as a Web Service, allowing you to use Bluespring BPM₅'s Invoke Web Service Activity to initiate Batch Files or other Command Prompt commands.

To install the Bluespring Command Service, complete the following steps:

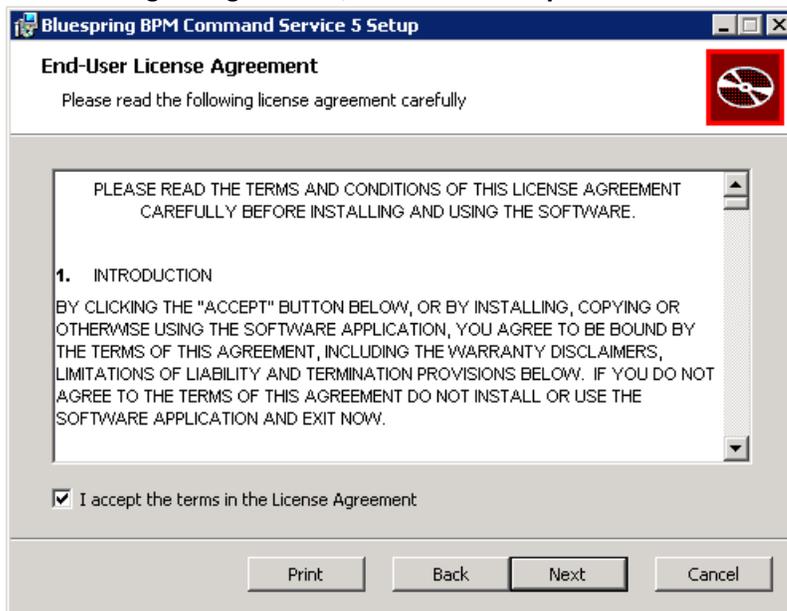
1. Double-click the BPM command service setup file (**bpm command service.msi**). The **Bluespring BPM Task Service 5 Setup Wizard** is displayed.



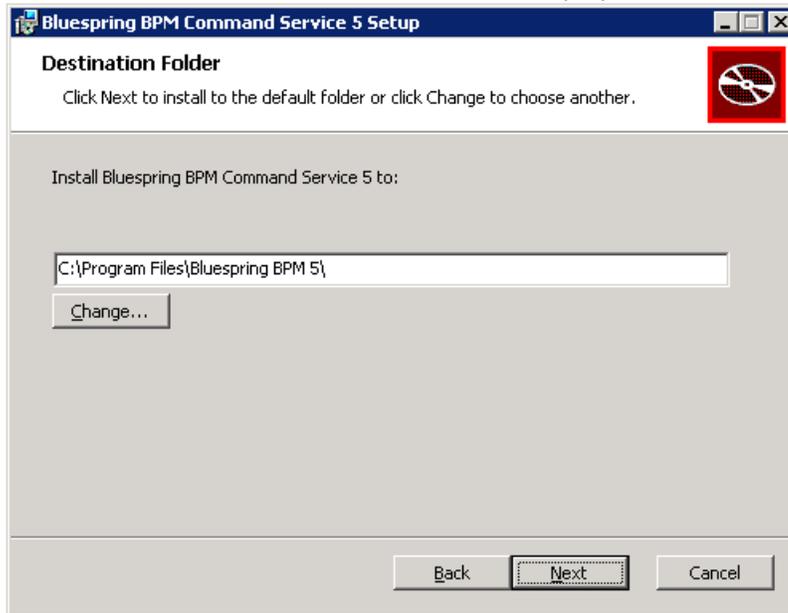
2. Click **Next**. The **End-User License Agreement** screen is displayed.



3. After reading the agreement, select the **I accept the terms in the License Agreement** check box.

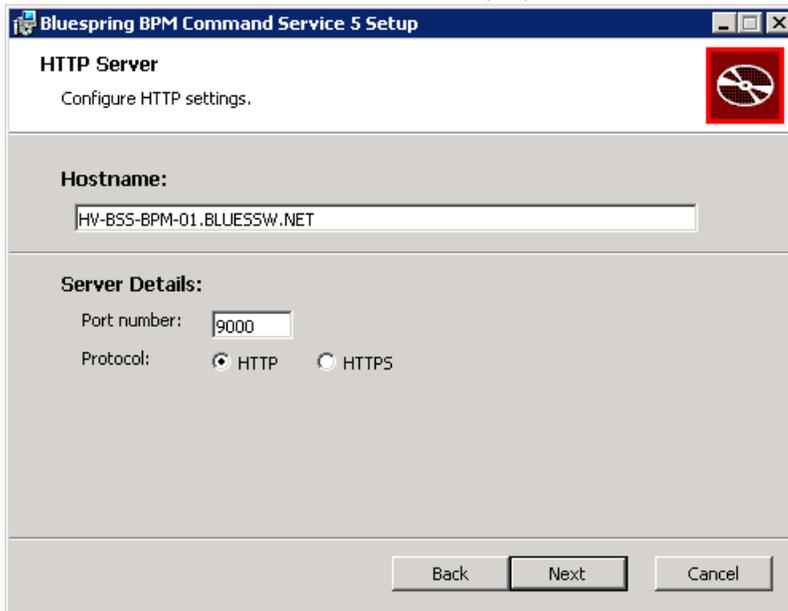


4. Click **Next**. The **Destination Folder** screen is displayed.



Note: If you want to choose a different destination folder, click Change and select the folder where you want to store the BPM Task Service files.

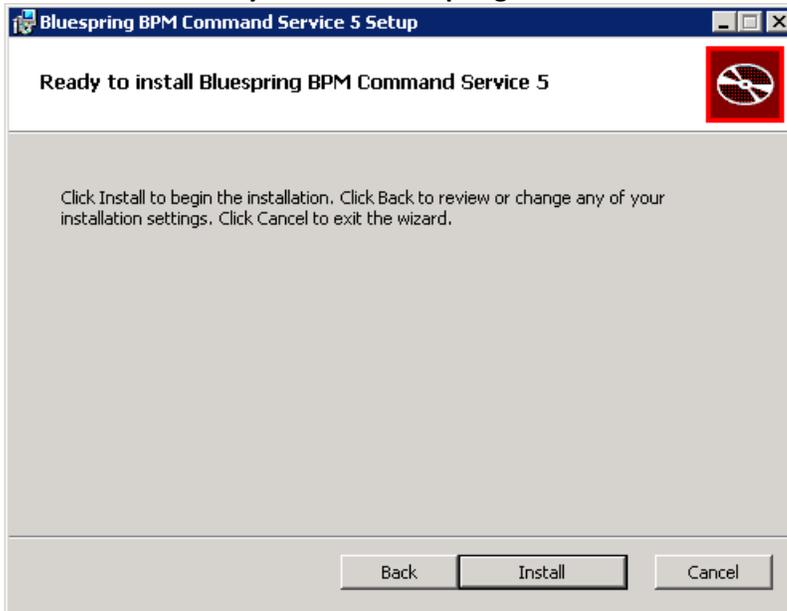
5. Click **Next**. The **HTTP Server** screen is displayed.



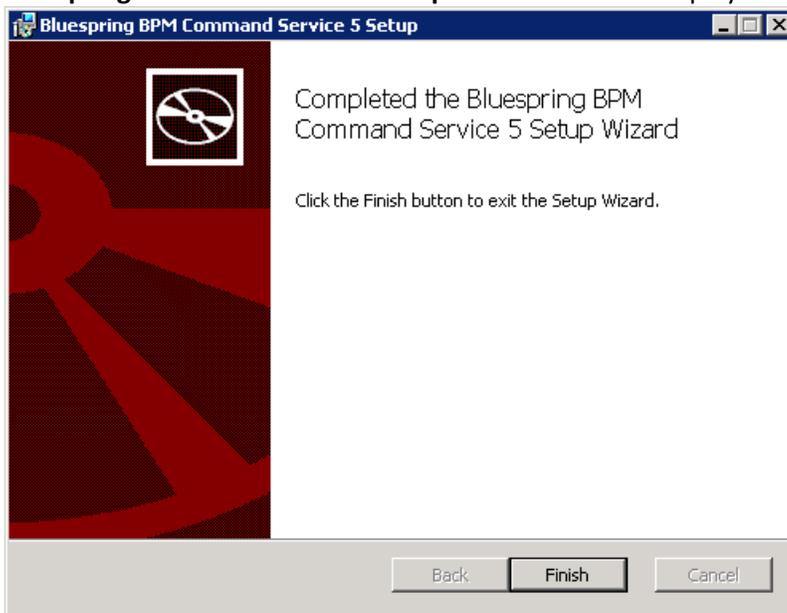
6. In the **Hostname** field, type the name of the host server.
7. In the **Server Details** fields type the following:
 - a. The port number in the **Port number** field. The Notification Service will listen for requests on this port.

Note: Port 9000 is the default port used by BPM 5's services; however, you can change the port number if port 9000 is used by another application.

- b. Select **HTTP** from the **Protocol** options. You select HTTP to transmit unencrypted data and HTTPS to transmit encrypted data.
8. Click **Next**. The **Ready to install Bluespring BPM Command Service 5** screen is displayed.



9. Click **Install**. The Installation begins. When the installation is completed, the **Completed the Bluespring BPM Task Service 5 Setup Wizard** screen is displayed.



10. Click **Finish**. You installed the Bluespring Command Service.

Appendix A: Security Note: Windows Server 2008 User Account Control

You may see a User Account Control window may appear when installing on Server 2008. If you do not see the window, then your IT department has disabled this feature and you can ignore this section.

User Account Control windows are meant to provide additional security for Microsoft Windows. Prior to changes being made to your computer, an unauthorized application must receive authorization to do so. In order to proceed with installation, you must click Yes to authorize the application.

A User Account Control window may resemble the image below:



Appendix B: Windows Firewall and SQL Server Configuration

Bluespring recommends the service and applications be installed on one server and the workspace and runtime databases be installed on another server dedicated to hosting Microsoft SQL Server. Because the services and applications will be installed on a separate server, you will need to confirm the following Windows Firewall and SQL Server settings are correct:

- Open TCP port 1433 in Windows Firewall on the Microsoft SQL Server
- Open TCP port 9000 in Windows Firewall on Bluespring Server(s)
- Start SQL Browser Service on SQL Server
- Enable TCP/IP in SQL Server Configuration Manager

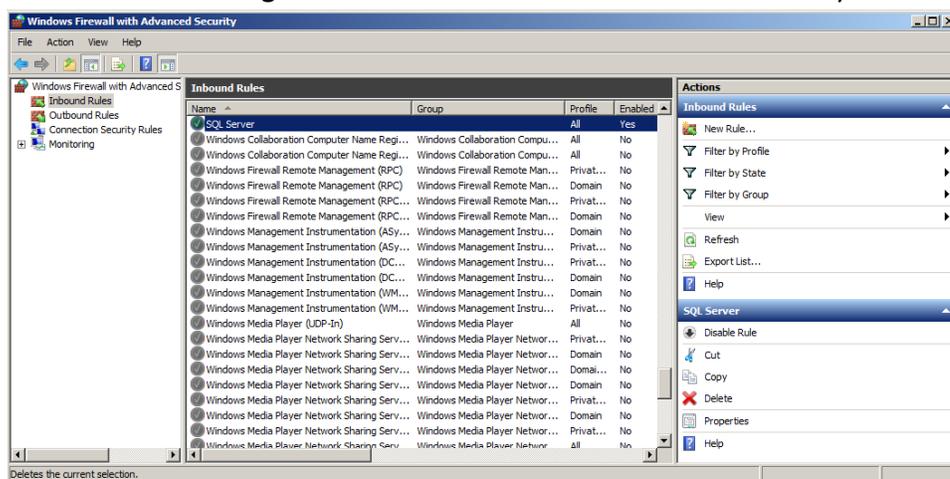
Opening TCP Port 1433 in Windows Firewall on the Microsoft SQL Server

For BPM Designer, BPM Admin, and the services to access the database from the remote computer or server, TCP port 1433 needs to be open in Windows Firewall on Server 2008. By default, Windows Firewall blocks this port, which is SQL Server's default port for accepting connection. The port number can be changed, so confirm with your database administrators that the port number being used is 1433 or note the port being used by the database.

If the SQL and BPM₅ services and applications are on one server then you do not need to open the port, because all of the communication between the components happens behind the computer's firewall.

To open the TCP port 1433 in Windows Firewall on Server 2008, complete the following steps:

1. From the **Start** menu, click **Control Panel**.
2. Click **System and Security**.
3. Click **Windows Firewall**. The Windows Firewall screen is displayed.
4. Click **Advanced Settings**. The Windows Firewall with Advanced Security window opens.



5. Click **Inbound Rules**. The Inbound Rules are displayed in the center pane.

6. From the **Actions** on the right-side of the window, click the **New Rule**. The New Inbound Rule Wizard window is displayed.
7. On the **Rule Type** tab, select the **Port** option, and then click **Next**. The Protocol and Ports tab is displayed.
8. Confirm the **TCP** option is selected. If not selected, select TCP instead of UDP.
9. In the specific port field type **1433**, and then click **Next**. The options for the Action tab are displayed.
10. Confirm the **Allow the connection** option is selected. If not selected, select that option.
11. Click **Next**. The Profile tab is displayed.
12. Click **Next**. The Name tab is displayed.
13. In the **Name** field type SQL Server. The Description is optional.
14. Once you are finished typing the Name and, optionally, the Description, click **Finish**. You opened the TCP port 1433.

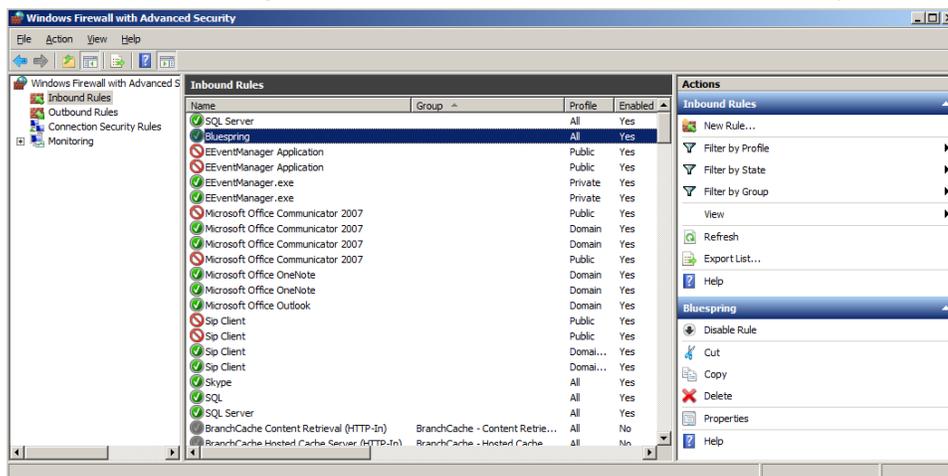
Opening TCP port 9000 in Windows Firewall on Bluespring Server(s)

By default, the BPM₅ service installs assume you want to install them to port 9000. You should only change this option if the port is taken by another application; however, Bluespring also recommends each server be dedicated to BPM₅ for optimal processing. If the port is blocked, which it is by default, then you will not be able to communicate with the Bluespring BPM₅ Services from a remote computer.

If all of the BPM₅ services and applications are on one server then you do not need to open the port, because all of the communication between the components happens behind the firewall.

To open TCP port 9000 in Windows Firewall on Server 2008, complete the following steps:

1. From the **Start** menu, click **Control Panel**.
2. Click **System and Security**.
3. Click **Windows Firewall**. The Windows Firewall screen is displayed.
4. Click **Advanced Settings**. The Windows Firewall with Advanced Security window opens.



5. Click **Inbound Rules**. The Inbound Rules are displayed in the center pane.
6. From the **Actions** on the right-side of the window, click **New Rule**. The New Inbound Rule Wizard window opens.
7. On the **Rule Type** tab, select the **Port** option, and then click **Next**. The Protocol and Ports tab is displayed.
8. Confirm the **TCP** option is selected. If not selected, select TCP instead of UDP.
9. In the specific port field type **9000**, and then click **Next**. The options for the Action tab are displayed.
10. Confirm the **Allow the connection** option is selected. If not selected, select that option.
11. Click **Next**. The Profile tab is displayed.
12. Click **Next**. The Name tab is displayed.
13. In the **Name** field type Bluespring. The Description is optional.
14. Once you are finished typing the Name and, optionally, the Description, click **Finish**. You opened the TCP port 9000.

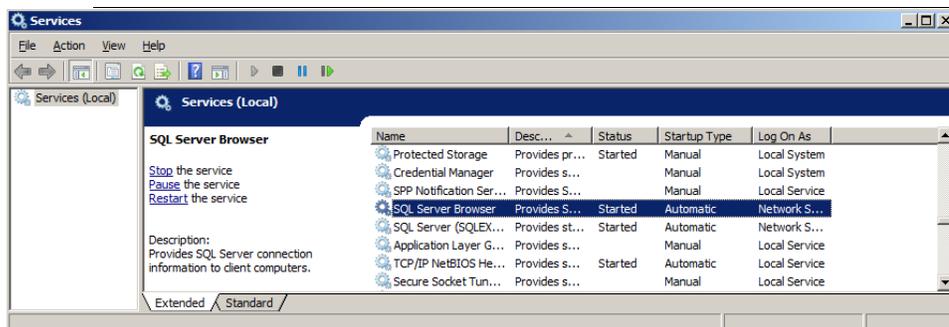
Starting SQL Server Browser Service on SQL Server

When you start the SQL Server Browser, it supplies client computers with SQL Server connection information and is required when the Bluespring services and applications are not hosted on the SQL Server.

To start the SQL Server Browser service, complete the following steps:

1. On your SQL Server hosting the workspace and runtime databases, open **Services**.

Note: One way to open Services is to go to Windows Start > Control Panel > System and Security > Administrative Tools > Services.



2. Right-click **SQL Server Browser**. A drop-down list will be displayed.
3. From the drop-down list select Start. The SQL Server Browser service is now started.

Enabling TCP/IP in SQL Server Configuration Manager

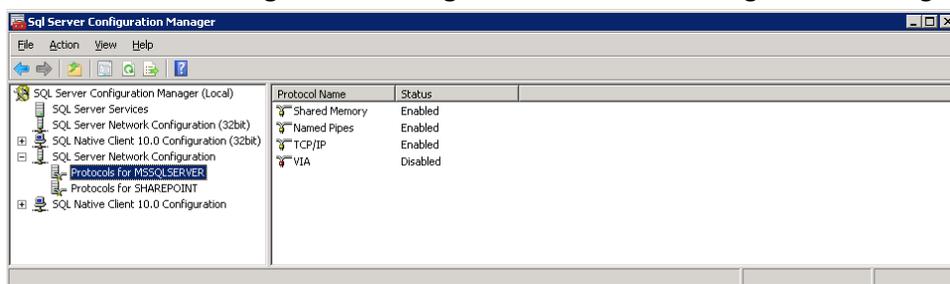
Finally, you will need to enable TCP/IP for the SQL Server instance hosting the workspace and runtime databases. This feature is required when the Bluespring services and applications are not hosted—as recommended—on the SQL Server.

To enable TCP/IP in SQL Server Configuration Manager, complete the following steps:

1. From the **Start** menu, click **Microsoft SQL Server 2008 R2**.

Note: Similar steps apply for Microsoft SQL Server 2005 and Microsoft SQL Server 2008.

2. Click **Configuration Tools**.
3. Click **SQL Server Configuration Manager**. The SQL Server Configuration Manager window opens.

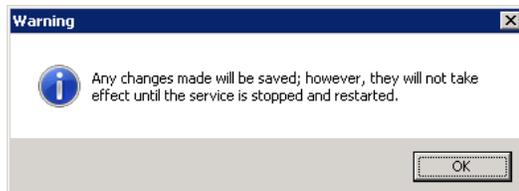


4. Expand the **SQL Server Network Configuration**. A list of SQL Server instances is listed.
5. Click the **Protocols for <Bluespring Instance>** where <Bluespring Instance> is the SQL Server instance hosting your workspace and runtime databases. The protocols for that instance are displayed to the right.

Note: For SQL Server 2005, you need to expand the SQL Server 2005 Network Configuration.

Note: In the above screenshot the instance is called MSSQLSERVER.

6. Right-click the **TCP/IP** protocol, and then click **Enable**. The following Warning window will appear telling you that you will need to restart the SQL Server service.



7. Click **OK**. You enabled the TCP/IP protocol and now need to restart the SQL Server service for the change to become active.
8. Click **SQL Server Services**.
9. Right-click the **SQL Server (<Bluespring Instance>)** where <Bluespring Instance> is the SQL Server instance hosting your workspace and runtime database.

10. Click **Restart**. The service restarts and the TCP/IP protocol change is not active.

You completed the necessary server changes to allow the Bluespring services and applications to connect to a remote SQL Server.

Appendix C: Creating a Console with the Bluespring Admin Snap-in

Creating a custom console with the Bluespring BPM Admin snap-in will allow you to manage common Windows and Bluespring features from a single interface. Additionally, the Bluespring BPM Admin added to your custom console will remember the workspace, so you do not have to enter the workspace each time you open the console.

1. Click **Window Start > Run**. The **Run** window is displayed.
2. Type **MMC** in the **Open** field.
3. Click **OK**. The new console window is displayed.
4. From the **File** menu, click **Add/Remove Snap-in** from the drop-down list. The **Add or Remove Snap-ins** window is displayed.
5. Select **Bluespring BPM Admin** from the Available Snap-ins field.
6. Click **Add**. The **Workspace Connection** window is displayed.
7. Type the name of the server hosting your workspace in the **Workspace server name** field.
8. Type the appropriate port number in the **Port** field.
9. Select **HTTP** or **HTTPS** from the **Protocol** field.

Note: Choose **HTTPS**, if they require secure connections

10. Click **OK**. You added the Bluespring BPM Admin snap-in to the console.

Note: If you want to extend the options on the console, Bluespring recommends adding the Event Viewer and Server Manager snap-ins. The Event Viewer allows you to view the event logs for the Bluespring services and the standard Windows logs. The Server Manager is recommended, because it provides access to the Message Queues and other features installed on this server.

11. Click **OK**.
12. From the **File** menu, click **Options**. The **Options** window is displayed.
13. Type the new name in the **Console** field.
14. From the **Console mode** field, select **User mode - full access** to prevent a reoccurring window that will prompt you to save.
15. Select the **Do not save changes to this console** check box.
16. Click **OK**.
17. From the **File** menu, click **Save**. The **Save As** window is displayed.
18. Save the console to the location of your choice. You created a console that uses the Bluespring BPM Admin snap-in.

Appendix D: Activating your copy of BPM Designer

Bluespring Software will provide you with one of two types of licenses, *Trial* or *Full*. With the *Trial* license, you will have a designated number of days to use the software before the license expires. The trial period starts when the license is activated and the license cannot be used again once activated.

You can activate BPM Designer via the Internet or the activation website.

Activating through the Internet

To activate the BPM Designer Licensing, complete the following steps:

1. Open BPM Designer. The Activate BPM Designer 5.1 window is displayed when one of the following conditions is true:
 - a. You open BPM Designer on your computer for the first time.
 - b. You have been using a Trial license and you decide to activate Designer with a Full license.
 - c. Your license file is invalid.
2. In the **User ID** field, enter the User ID from the license you received from Bluespring. The User ID will be a series of numbers (Example: 1234).
3. In the **Password** field, enter the password associated with the User ID you received from Bluespring.

Note: By default, the **I want to activate the software over the internet** option is selected.

4. Click **Next**. The activation status page is displayed.
5. Click **Register Now** to register your copy of BPM Designer. The **Registration Information** window is displayed.

Note: Registration is optional. If you do not want to register your copy of BPM Designer, skip to step 8.

6. Type the appropriate information into the corresponding fields.
7. Click **Register**. The **Registration** window is displayed, notifying you that the registration is complete.
8. Click **OK** to close the **Registration** window.
9. Click **Close** in the **Activate BPM Designer** window. BPM Designer automatically opens. You successfully activated BPM Designer through the internet.

Activating through the Activation Website

To activate the software through the activation website, complete the following steps:

1. Open BPM Designer. The Activate BPM Designer 5.1 window is displayed when one of the following conditions is true:
 - a. You open BPM Designer on your computer for the first time.

- b. You have been using a Trial License and you decide to activate Designer with a Full License.
 - c. Your license file is invalid.
2. Type the appropriate information into the **User ID** field, enter the User ID from the license you received from Bluespring. The User ID will be a series of numbers (Example: 1234).
 3. In the **Password** field, enter the password associated with the User ID you received from Bluespring.
 4. Select the **I want to activate the software through the activation website** option.
 5. Click **Next**. The Activation Code retrieval steps are displayed.
 6. Complete steps one and two provided on the page

Note: Ensure that your computer has internet access prior to the completion of these steps.

7. Click the link provided in step three. The website will appear in a new window.
8. Enter the verification number in the vacant fields of step two on the activation website.
9. Click **Submit**. A new page will appear displaying both the verification number entered and the activation code.

Note: Registration is optional. If you want to register click Register Now in the Activate BPM Designer 5.0 window.

10. Once you retrieve the Activation Code from the activation website, enter the code into the **Activate BPM Designer 5.0** window's vacant fields provided below step four.
11. Click **Next**. The activation status page is displayed.

Note: Registration is optional, if you want to register click Register Now in the Activate BPM Designer 5.0 window.

12. Click **Close**. BPM Designer 5 automatically opens. You successfully activated BPM Designer through the activation website.

Appendix E: Activating your BPM Process Engine through the Activation Website

To activate your BPM Process Engine through the activation website, complete the following steps:

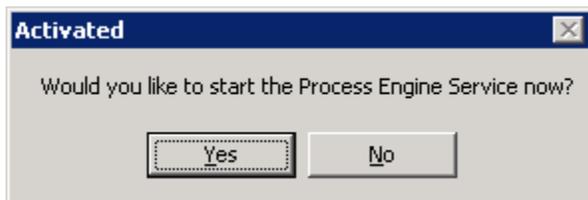
1. Type the appropriate information into the **User ID** field, enter the User ID from the license you received from Bluespring. The User ID will be a series of numbers (Example: 1234).
2. In the **Password** field, enter the password associated with the User ID you received from Bluespring.
3. Select the **I want to activate the software through the activation website** option.
4. Click **Next**. The Activation Code retrieval steps are displayed.
5. Complete steps one and two provided on the page

Note: Ensure that your computer has internet access prior to the completion of these steps.

6. Click the link provided in step three. The website will appear in a new window.
7. Enter the verification number in the vacant fields of step two on the activation website.
8. Click **Submit**. A new page will appear displaying both the verification number entered and the activation code.

Note: Registration is optional. If you want to register click **Register Now** in the Activate BPM5 Process Engine window.

9. Once you retrieve the Activation Code from the activation website, enter the code into the **Activate BPM Designer 5.0** window's vacant fields provided below step four.
10. Click **Next**. The activation status page is displayed.
6. Click **Close** in the **Activate BPM5 Process Engine** window. You successfully activated BPM5 Process Engine through the internet and now you want to start the service. The Activated window is displayed.



7. Click **Yes** to start the Process Engine Service. You started the Process Engine Service.

Appendix F: Manual Database Setup for Bluespring BPM5

BPM5 supports organizations that require databases and SQL accounts be created manually before executing the BPM5 installs. As documented in this install guide, you can create the accounts while setting up the Workspace install, and the runtime account can be created automatically with an auto-generated password during the runtime database install (runtimedb.exe).

If your organization requires that the databases and SQL accounts be created manually, please contact Bluespring Support: support@bluespringsoftware.com or (877) 871-9566, to review the steps involved in creating databases before installing Bluespring BPM5.

Appendix G: Refreshing a BPM5 Environment

Occasionally, a BPM5 environment may need to be “refreshed,” which means you will stop and then start the core BPM5 services. The services should be stopped and restarted in a specific order as discussed in this section of the guide.

You should refresh your environment when connections to the database server are disrupted. For example, if the database server is configured to failover to a mirrored server, then your BPM5 services will continue running. However, you should still refresh your services to confirm the connections are current and to reduce potential issues with future processing.

To refresh your BPM5 environment, please complete the following steps manually:

1. On your BPM5 server, open Server Manager and access Services.
2. Stop the Bluespring Notification Service.
3. Stop the Bluespring Scheduling Service.
4. Stop the Bluespring Process Engine Service.
5. Stop the Bluespring Task Service.
6. Stop the Bluespring Workspace Service.
7. Start the Bluespring Workspace Service.
8. Start the Bluespring Task Service.
9. Start the Bluespring Process Engine Service.
10. Start the Bluespring Scheduling Service.
11. Start the Bluespring Notification Service.

You successfully refreshed your BPM5 environment.

NOTE: By following this installation manual and subsequent restart instructions, Bluespring BPM should perform as intended. However, it is recommended that Organizations put the server Bluespring resides on a reboot schedule commensurate with any firmware or OS updates, environment changes and/or standard Sever maintenance.