

Worksoft Continuous Testing Manager Installation Guide

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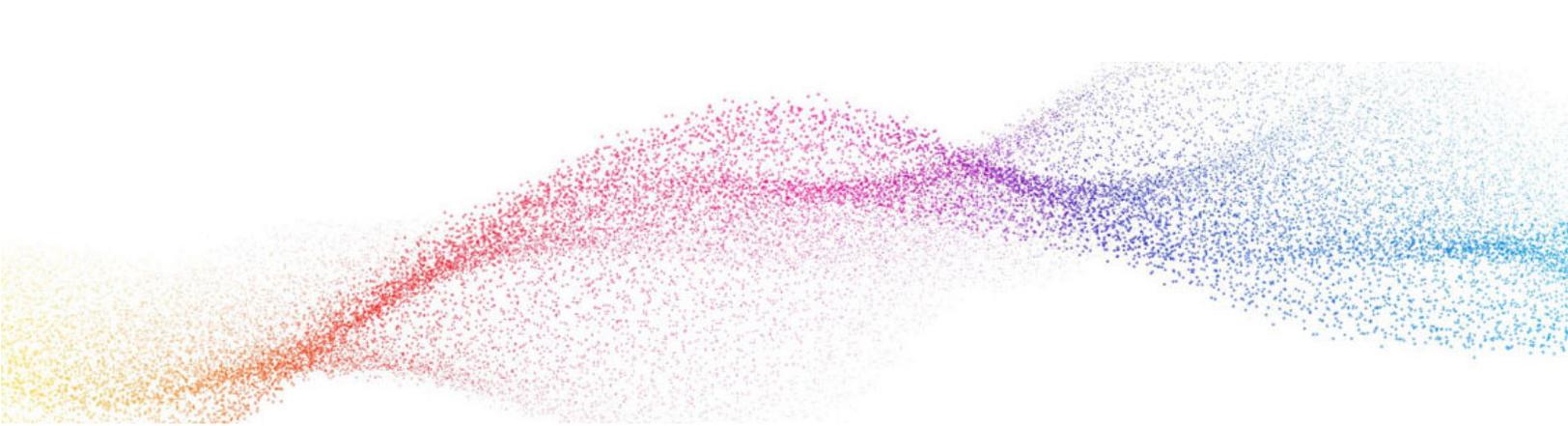
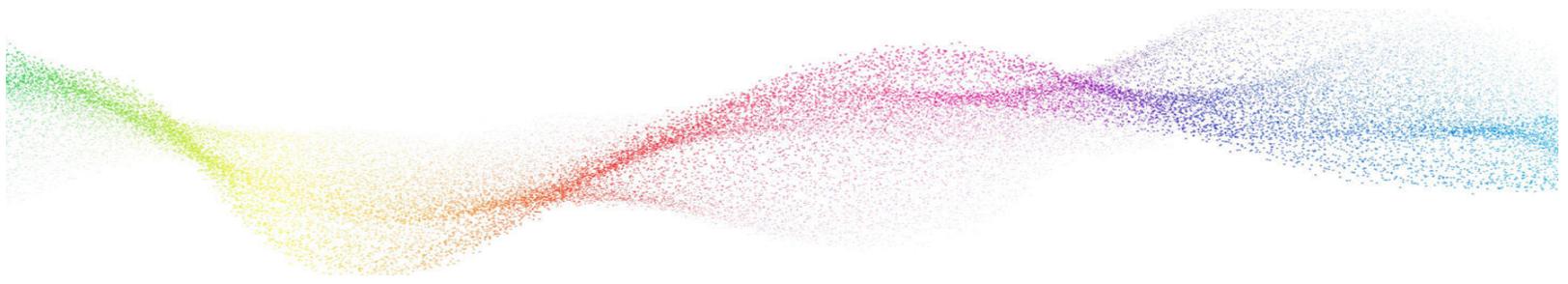


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Chapter 1 Installing Worksoft Continuous Testing Manager

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Installation Prerequisites

Before installing and configuring Worksoft Continuous Testing Manager (CTM), complete the following tasks:

- ◆ Verify that your system meets the requirements listed in the Worksoft Help Portal:
 - [Worksoft Application Server](#)
 - [Database Server](#)
- ◆ Configure your application server.
- ◆ Install and configure the Worksoft Portal and all infrastructure services on the application server.

The Worksoft Portal is an administration tool that registers the following information for Worksoft products:

 - Database settings
 - Licenses
 - Users
 - Groups
 - Email SMTP settings
 - Tenants
 - Integrations

For more information about configuring your application server and installing the Worksoft Portal, see the [Worksoft Infrastructure Services Installation Guide](#) in the [Worksoft Help Portal](#).

Installing the Worksoft Continuous Testing Manager

After you have verified that your environment has the needed system requirements installed and the Worksoft Portal is installed and configured, you are ready to install CTM.

The CTM package consists of the following components:

Component	Description
Worksoft Continuous Testing Manager (version).exe	Executable that installs CTM.
SqlScripts.zip	The zip file contains database scripts that create and upgrade CTM databases.

► **To install CTM:**

- 1 In the software distribution folder, right-click the **Worksoft Continuous Testing Manager (version).exe** file and select **Run as administrator**.

The Worksoft Continuous Testing Manager Install Wizard opens.



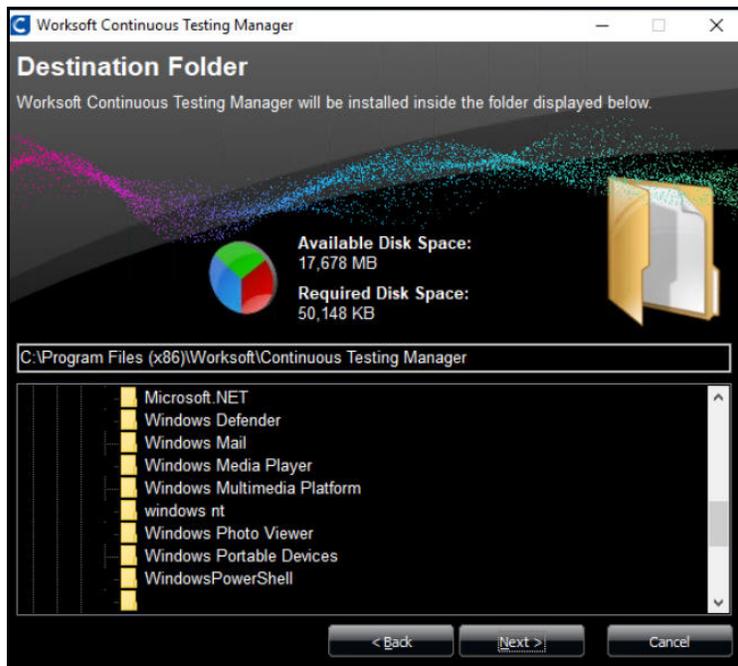
- 2 Click **Next** to begin the installation process.

The Other Worksoft Products and Services Dependencies page opens.



- 3 Verify that these products and services have been installed with the Worksoft Infrastructure Services installer.
- 4 Click **Next**.

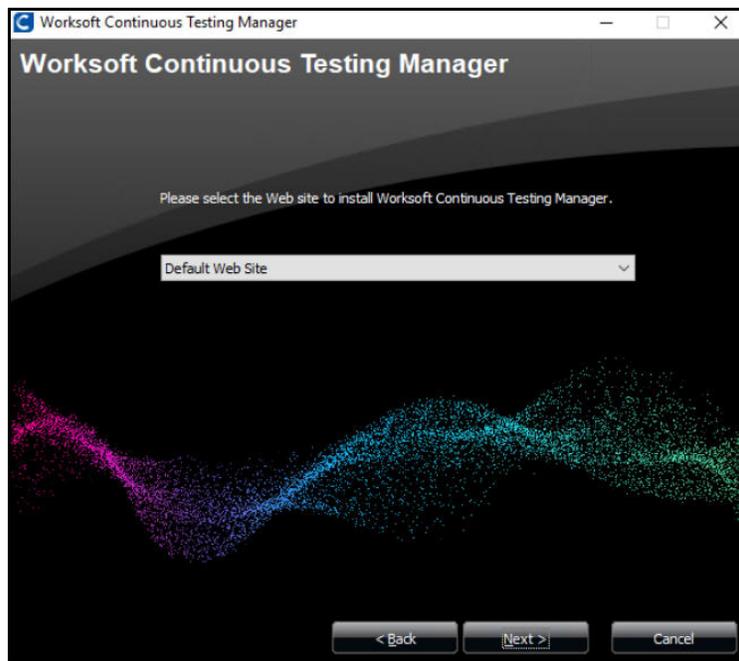
The Destination Folder page opens.



- 5 If you want to accept the default directory for your installation files, click **Next**.

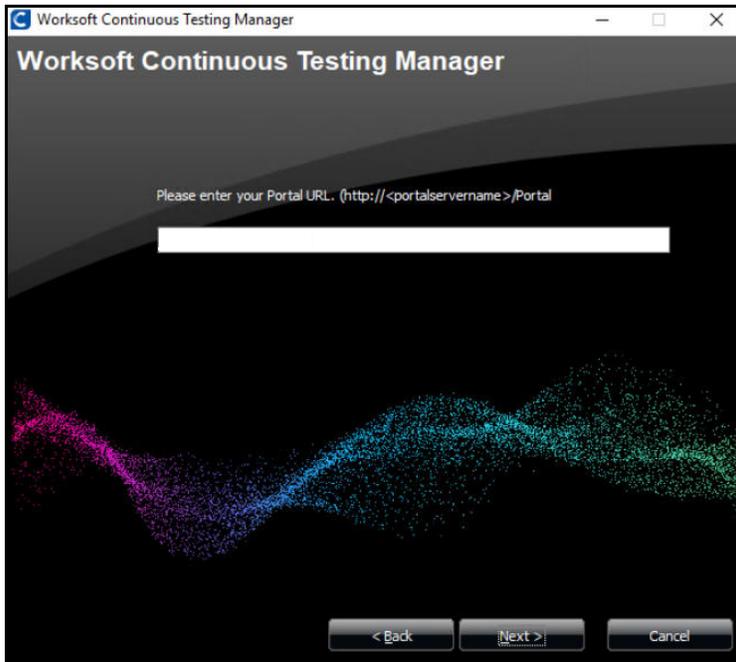
If you do not want to accept the default directory for the installation files, select a different installation directory and click **Next**.

The Worksoft Continuous Testing Manager Web Site page opens.



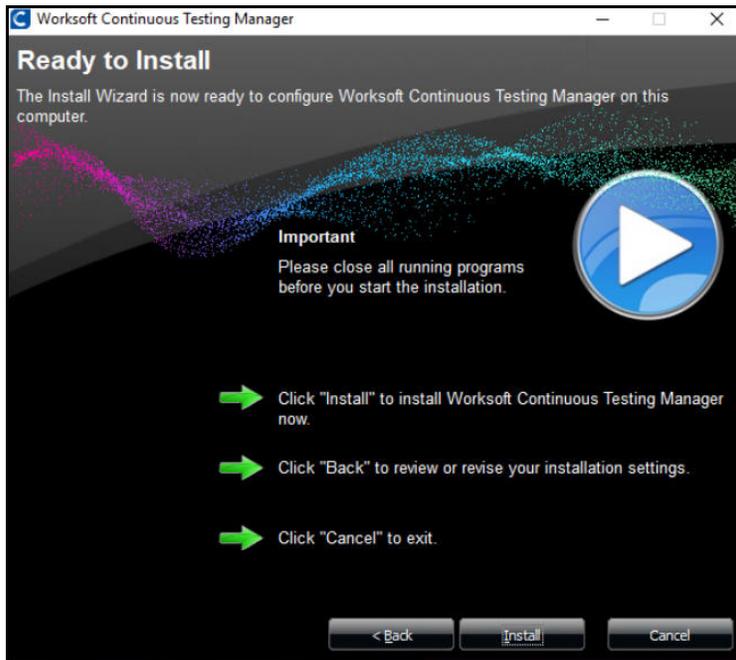
- 6 If you want to accept Default Web Site as your website, click **Next**.
- 7 If you have other websites configured in the IIS, select the server from the drop-down list and click **Next**.

The Worksoft Portal URL page opens.



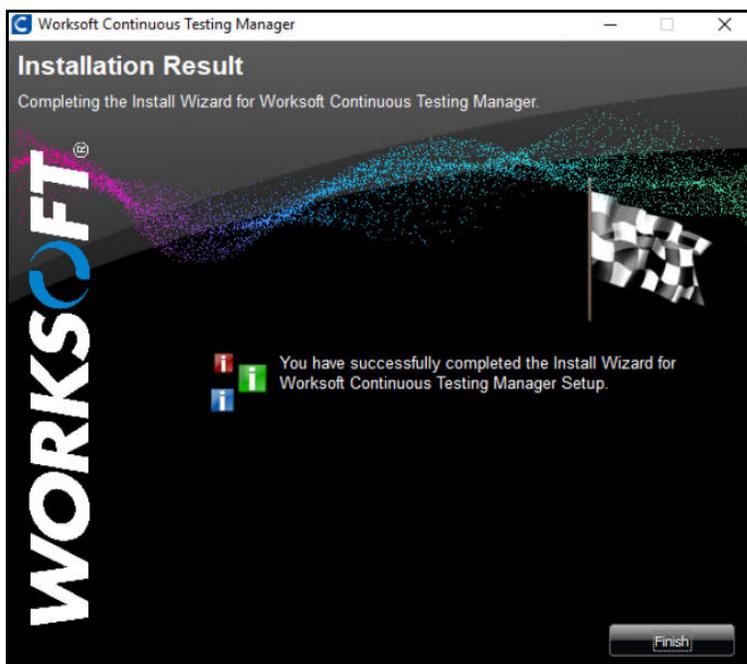
- 8 Enter the external URL address for the Worksoft Portal.
You must use a fully qualified domain name or a Domain Name System (DNS) alias.
Example: `https://servername.worksoft.com`

- 9 Click **Next**.
The Ready to Install page opens.



- 10 Click **Install** to begin the installation.

After the installation completes, the Installation Result page opens.



- 11** Click **Finish**.



Chapter 2 Creating the Worksoft Continuous Testing Manager Database

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Registering CTM

You must register Worksoft Continuous Testing Manager (CTM) and configure the database in the Worksoft Portal. CTM leverages information from the Portal.

Go to the Worksoft Portal URL address that was used during installation:

`https://<portalservername>/portal`

Example: `https://servername.worksoft.com/portal`

From the Worksoft Portal menu, select **Product Configuration > Continuous Testing Manager** to verify the registration.

The first time an administrator signs in to CTM through the URL address, CTM registers automatically in the Worksoft Portal. If, for some reason, it does not automatically register, you can trigger the registration by manually loading CTM at the following site:

`http(s)://servername/continuooustestingmanager/swagger`

Creating a CTM Database

When you create your CTM database, you must select how you want to set up your database security configuration. You need to be a superuser to configure both connections:

- ◆ **User Based Configuration**
- ◆ **Managed Service Identity Configuration**

▶ **To create a CTM database with a User-Based Configuration connection:**

- 1 From the Worksoft Portal menu, select **Product Configuration > Continuous Testing Manager**. The Database Configuration page opens.

- 2 Select the **User Based Configuration** option.
- 3 In the SQL Server field, enter the server name.
- 4 In the Database Name field, enter the database name.
- 5 If you want to use Windows authentication, select the **Use Trusted Connection (Windows)** option.
- 6 If you want to use SQL Server authentication, enter the SQL Server user name and password in the respective fields.

7 Select the **Trust Server Certificate** option.

8 Click **Test** to test your database connection.

A message opens stating if the connection was successful or failed. If the test fails, troubleshoot the database connection.

9 Click **OK** to close the message.

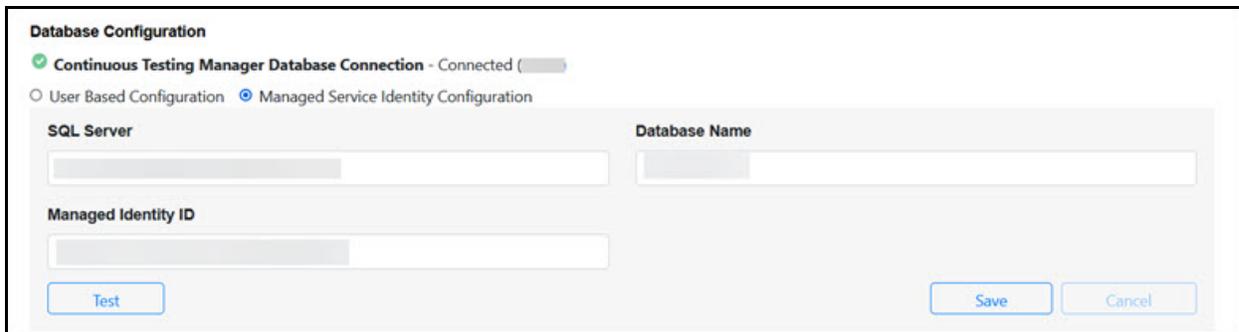
10 Click **Save** to save your database.

A message opens stating the connection was successful.

► **To create a CTM database with a Managed Service Identity Configuration connection:**

1 From the Worksoft Portal menu, select **Product Configuration > Continuous Testing Manager**.

The Database Configuration page opens.



2 Select the **Managed Service Identity Configuration** option.

3 In the SQL Server field, enter the server name.

4 In the Database Name field, enter the database name.

5 In the Managed Identity ID field, enter the ID.

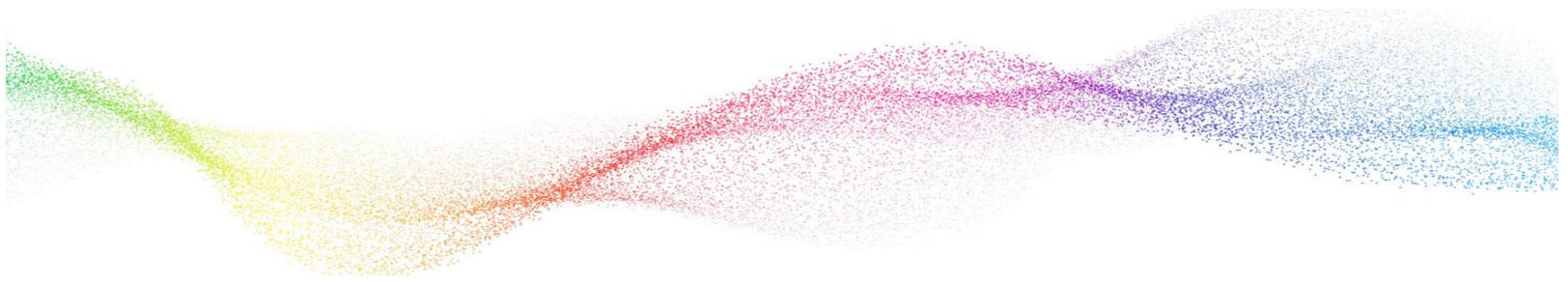
6 Click **Test** to test your database connection.

A message opens stating if the connection was successful or failed. If the test fails, troubleshoot the database connection.

7 Click **OK** to close the message.

8 Click **Save** to save your database.

A message opens stating the connection was successful.



Chapter 3 Installing Worksoft Continuous Testing Manager Agents

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Overview

Continuous Testing Manager (CTM) leverages dedicated client machines that have both Worksoft Certify and CTM Agent installed on them. It orchestrates the automation of process execution from the full repository of your Certify systems.

Determine how many client machines you will need by evaluating the number of Certify processes required to run daily. Also, figure out how much time it takes to ensure that all of your end-to-end processes run within a minimum set of time.

Each of these client machines must meet the minimum system requirements for the version of Worksoft Certify. For more information, see [Worksoft Client Machines System Requirements](#).

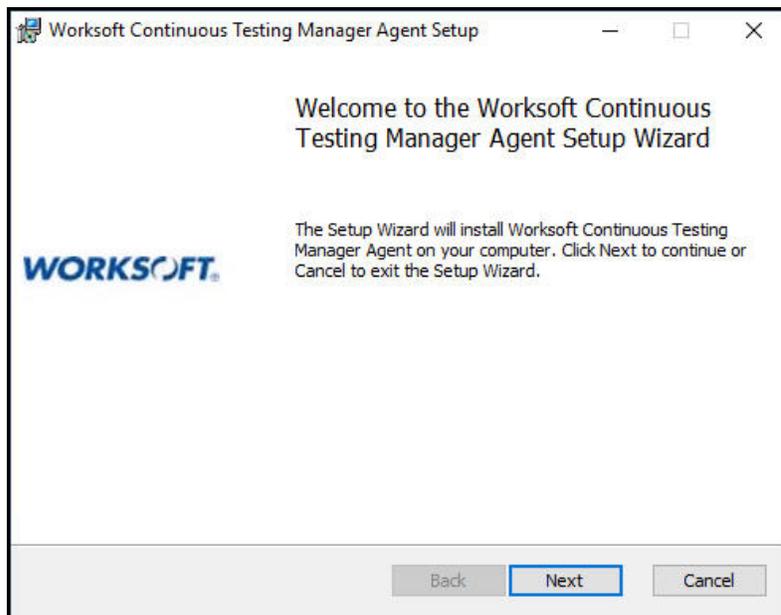
Installing a CTM Agent

CTM Agents are dedicated machines that you can schedule and manage to execute Worksoft Certify processes remotely.

► **To install a CTM Agent:**

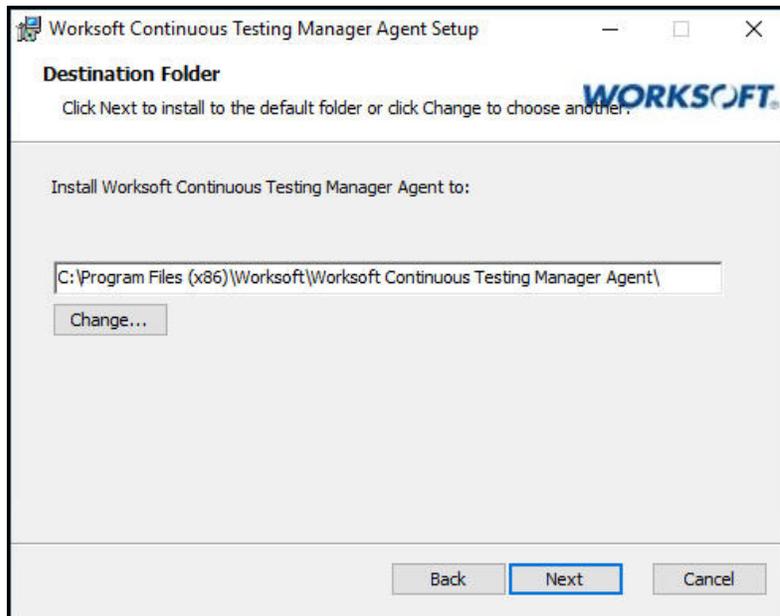
- 1 In your software distribution folder, double-click the **Worksoft Continuous Testing Manager Agent (version).msi** file.

The Worksoft Continuous Testing Manager Agent Setup Wizard opens.



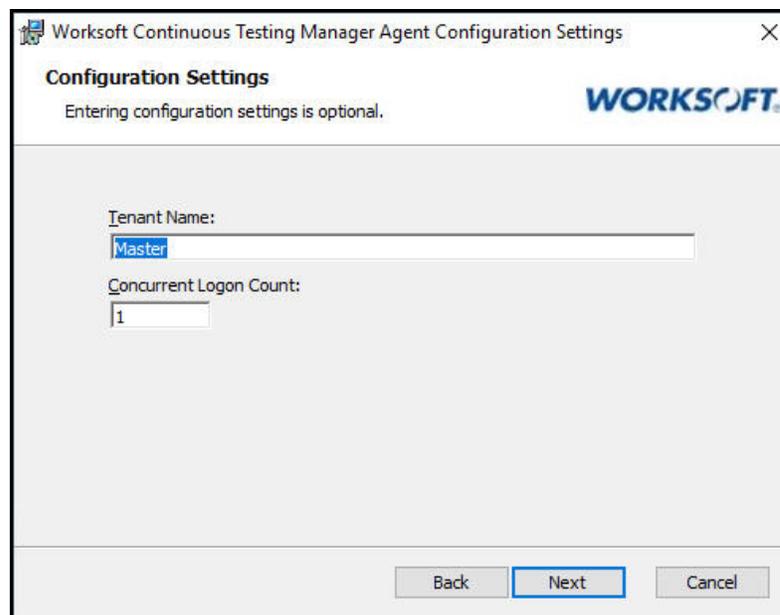
- 2 Click **Next**.

The Destination Folder page appears.



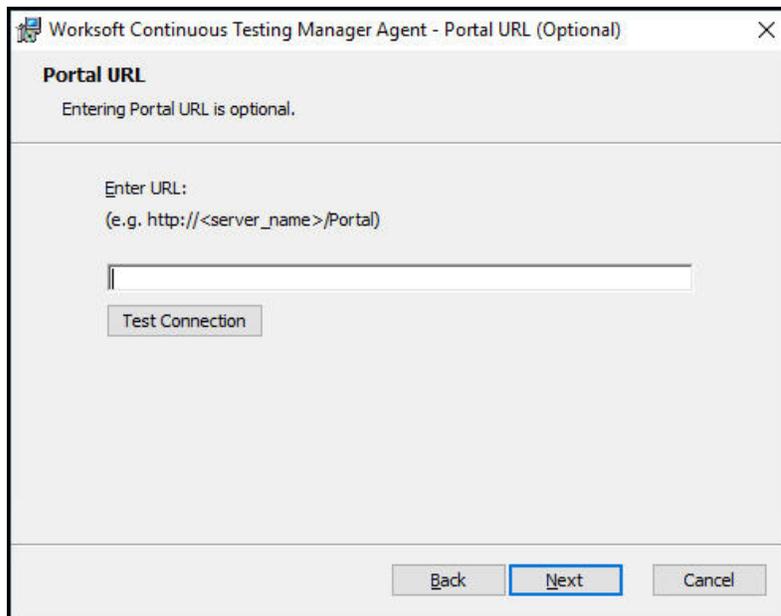
- 3 If you want to accept the default directory for your installation files, click **Next**.
If you do not want to accept the default directory for the installation files, click the **Change** button to select a different installation directory, and then click **Next**.

The Configuration Settings page opens.



- 4 In the Tenant Name field, enter a valid tenant name in the Worksoft Portal.
Each Agent can be assigned to only one tenant.
- 5 In the Concurrent Logon Count field, enter a number.
If an invalid value is added, it will default to one.
- 6 Click **Next**.

The Worksoft Portal URL page opens.



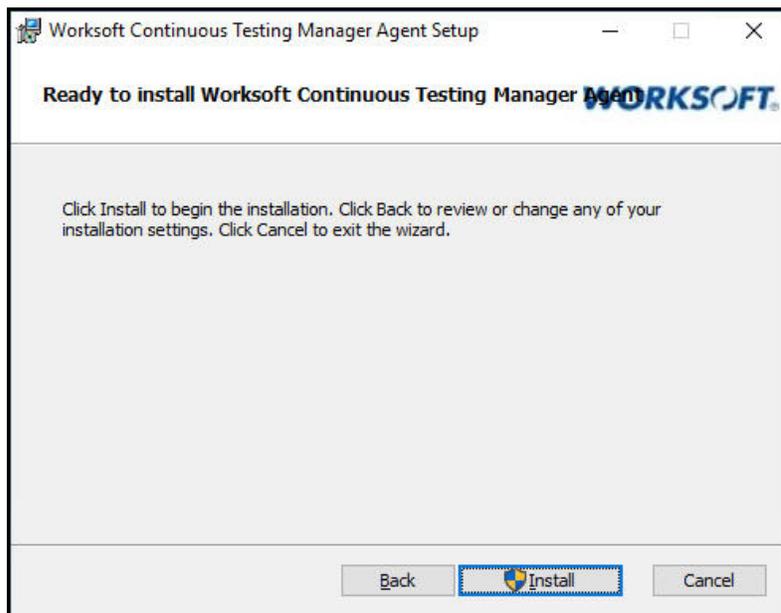
7 Enter the Worksoft Portal URL.

By default, the URL address is populated as `http://<servername>`. You must change it to `https` for secure authentication.

8 Click **Test Connection** to test the connection.

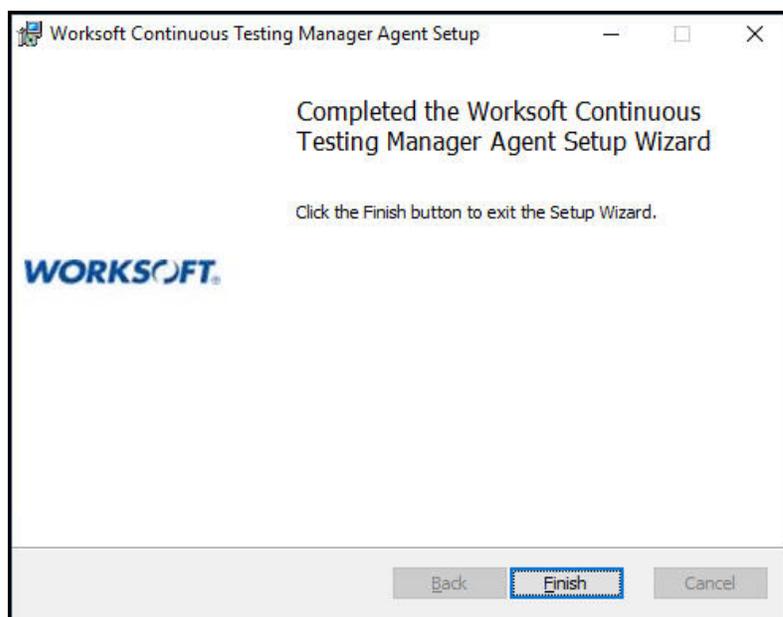
9 Click **Next**.

The Ready to Install page opens.



10 Click **Install**.

The Completed Installer Setup Wizard page opens.



11 Click **Finish**.

The CTM Agent installation is complete, and the agent starts by default.

Repeat this installation process for all the client machines you intend to use.

Configuring CTM Agents

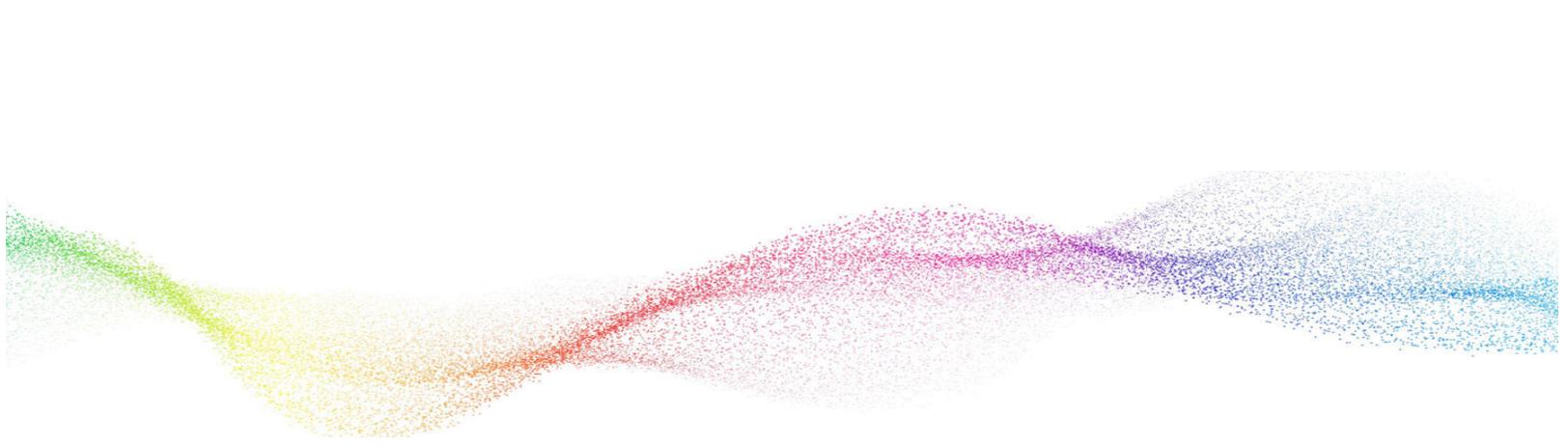
The desktop machine where CTM Agent is installed needs to have Remote Desktop Protocol (RDP) configured. The Citrix server must be configured to support RDP sessions if you have a Citrix environment. Test your configuration by running **mstsc.exe**. This configuration setting is not enabled by default.

Disabling Windows Fast User Switching Mode

CTM Agents require the ability to enter a username and password on the screen. If the login screen displays a Switch User button, then the Agent will not start. Consult your IT administrator about disabling the **Fast User Switch** mode in the Local Group Policy Editor.

► **To disable Windows Fast User Switch mode:**

- 1** From the Windows Start menu, type **gpedit.msc**, and press **Enter**.
The Local Group Policy Editor opens.
- 2** In the Local Group Policy Editor Navigation pane, drill down and select **Computer Configuration > Administrative Templates > System > Logon**.
- 3** In the Setting pane, double-click **Hide entry points for Fast User Switching**.
The Properties dialog box for this setting opens.
- 4** Select the **Enabled** option.
- 5** Click **OK**.



Appendix A Worksoft Continuous Testing Manager Silent Installation

Install with all defaults:

Install on default path C:\Program Files (x86)\Worksoft:

```
<InstallerPath>\Worksoft Continuous Testing Manager.exe /s
```

Provide Non-default website:

```
<InstallerPath>\Worksoft Continuous Testing Manager.exe /s
```

Provide portal URL during silent install:

```
https://<portalservername>/portal /s
```

Example: `https://servername.worksoft.com/portal /s`

Provide default install location override:

```
<InstallerPath>\Worksoft Continuous Testing Manager.exe /s TargetDir="C:\Temp\"
```

Provide Install log location override:

The default installation log is located at **%userprofile%** of the user who installed Worksoft Continuous Testing Manager.

```
<InstallerPath>\Worksoft Continuous Testing Manager.exe /s /l=C:\temp\CTMInstalllog.txt
```

Silent Uninstall:

```
Worksoft Continuous Testing Manager.exe /s MODIFY=FALSE REMOVE=TRUE UNINSTALL=YES
```