

Worksoft Continuous Testing Manager Installation Guide

Worksoft Continuous Testing Manager Installation Guide

Version 14.1

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Table of Contents

Chapter 1 Before You Install Worksoft Continuous Testing Manager	4
Overview	5
Installing Worksoft Portal and Infrastructure Services	5
Verifying CTM System Requirements	5
Configuring Your Application Server	6
Adding Roles and Features	6
Configuring the Web Server Role (IIS)	12
Configuring Application/Json MIME Type Compression	14
Enabling IIS Services	16
Configuring HTTPS on Your Application Server	17
Chapter 2 Installing Worksoft Continuous Testing Manager	18
Worksoft Continuous Testing Manager Package	19
Installing Worksoft Continuous Testing Manager	19
Chapter 3 Creating the Worksoft Continuous Testing Manager Database	23
Registering CTM	24
Creating a CTM Database	24
Chapter 4 Installing Worksoft Continuous Testing Manager Agents	26
Overview	27
Installing a CTM Agent	27
Configuring CTM Agents	30
Disabling Windows Fast User Switching Mode	30
Appendix A Worksoft Continuous Testing Manager Silent Installation	31



Chapter 1 Before You Install Worksoft Continuous Testing Manager

In This Chapter

- Overview 5
- Installing Worksoft Portal and Infrastructure Services..... 5
- Verifying CTM System Requirements 5
- Configuring Your Application Server 6
- Enabling IIS Services 16
- Configuring HTTPS on Your Application Server..... 17

Overview

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

- ◆ Install and configure Worksoft Portal and all infrastructure services.
- ◆ Verify that your CTM server has the needed system requirements installed.
- ◆ Configure Microsoft® Internet Information Services (IIS) on your CTM Server.
- ◆ Enable IIS Services.

Installing Worksoft Portal and Infrastructure Services

CTM leverages information from the administration tool Worksoft Portal and its infrastructure services. The Worksoft Portal registers database settings, licenses, users, and integrations for Worksoft products.

When installing Worksoft Portal, use the external URL for the Authentication service, and do not use a localhost. If you use a localhost, it will cause the applications to break.

You must use a fully qualified domain name or a Domain Name System (DNS) alias.

Go to the [Worksoft Customer Portal](#) to download Worksoft Infrastructure Services.

To view the Worksoft Infrastructure Services system requirements and installation guide, see the [Worksoft Help Portal](#).

Verifying CTM System Requirements

Verify that your environment has the needed system requirements installed. For information about system requirements and port requirements, see the [Worksoft Help Portal](#).

The CTM server must have public Internet access.

You must use a fully qualified domain name or a Domain Name System (DNS) alias.

Configuring Your Application Server

In order to transform your application server into a web server to host CTM, Microsoft® Internet Information Services (IIS) must be installed, and the Server Manager must be configured.

These procedures assume that you have not already configured your IIS. If you have already set up the Roles and Features, verify that the following Role Services on [page 13](#) have been selected.

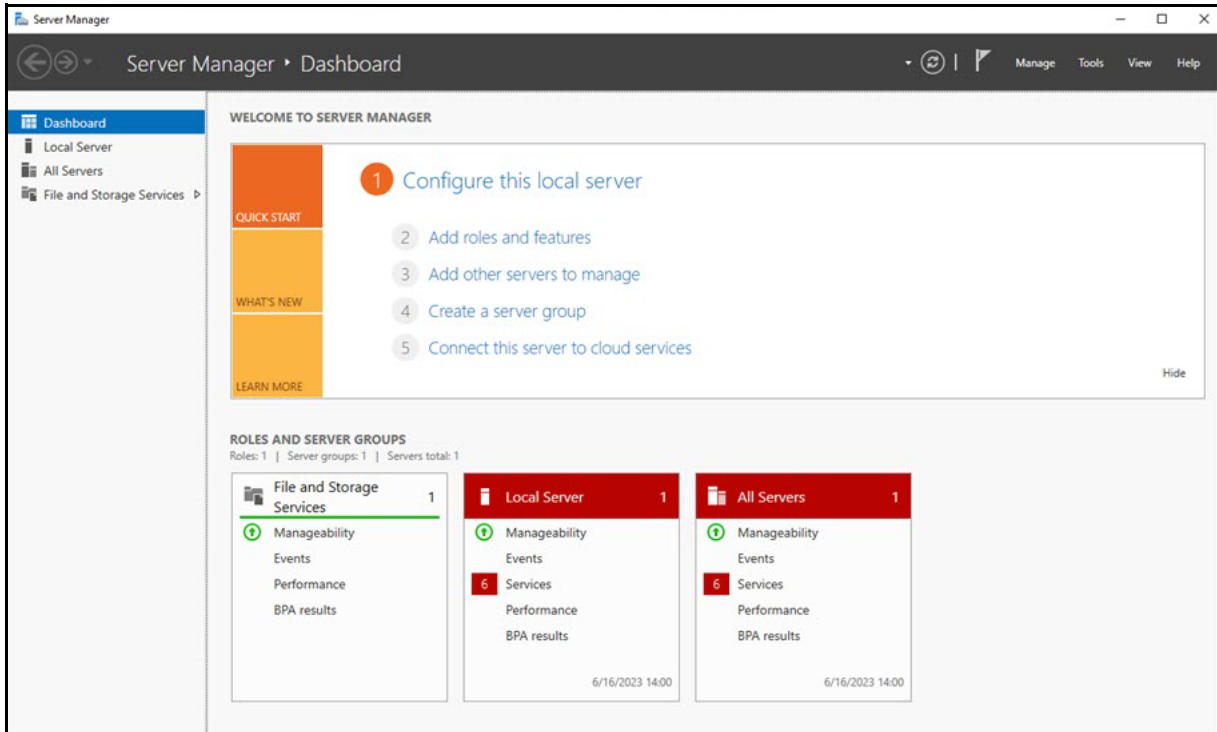
Adding Roles and Features

The Server Manager allows you to add specific roles and features to your web server that are required for Worksoft products.

► **To add roles and features to your web server:**

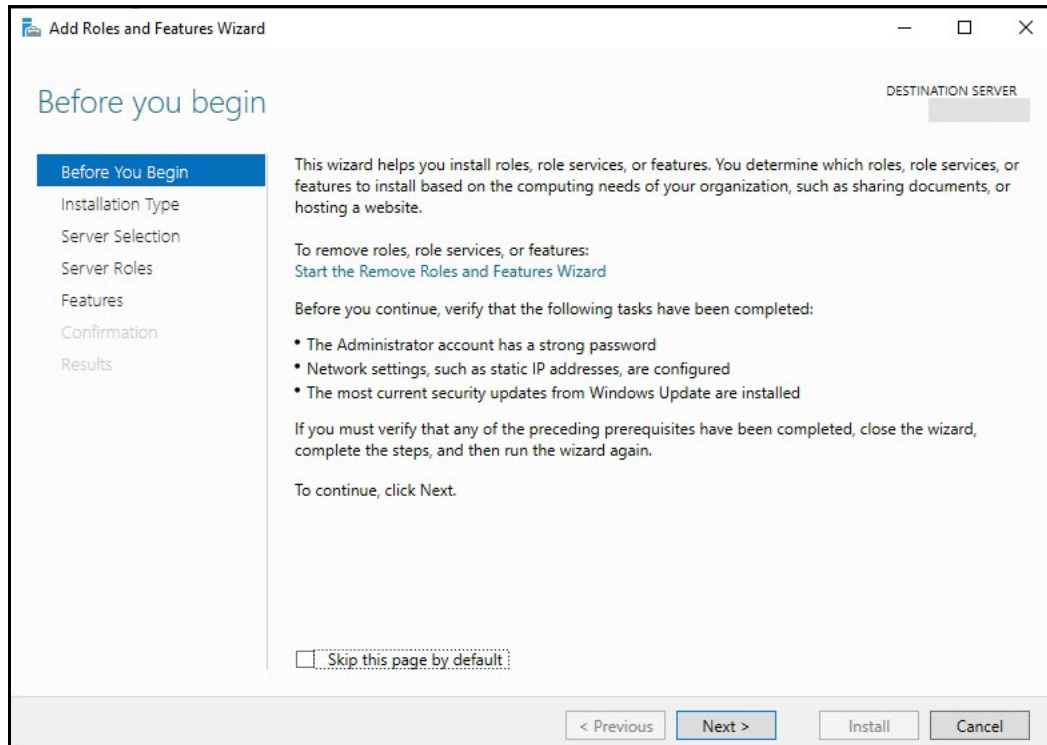
- 1 From the Start menu, select **Server Manager**.

The Server Manager opens.



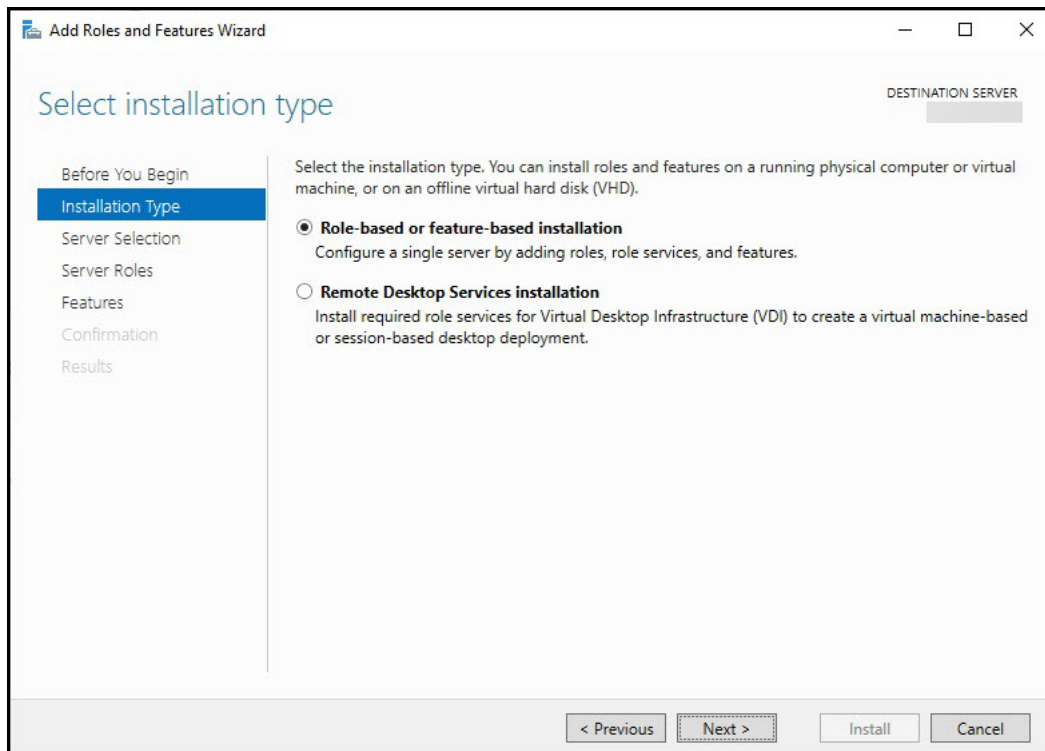
- 2 In the Navigation pane, select **Dashboard**.
- 3 In the Summary Tasks pane, select **Add Roles and Features**.

The Add Roles and Features Wizard opens.



4 Click **Next**.

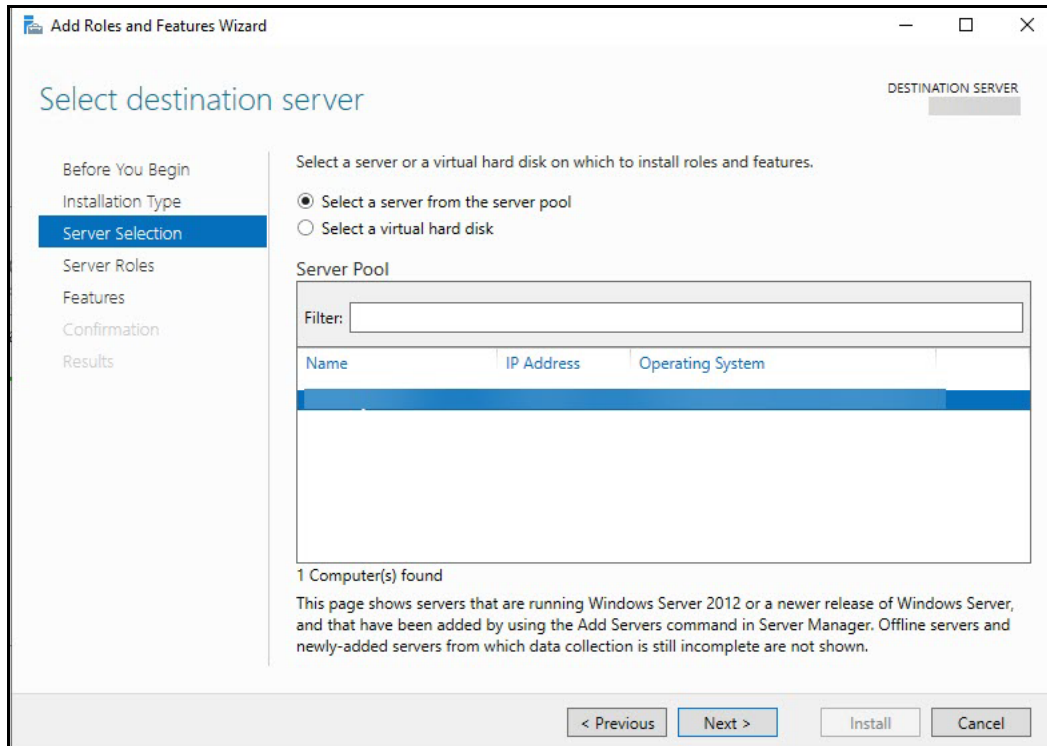
The Select Installation Type page opens.



5 Select the **Role-based or feature-based Installation** option.

6 Click **Next**.

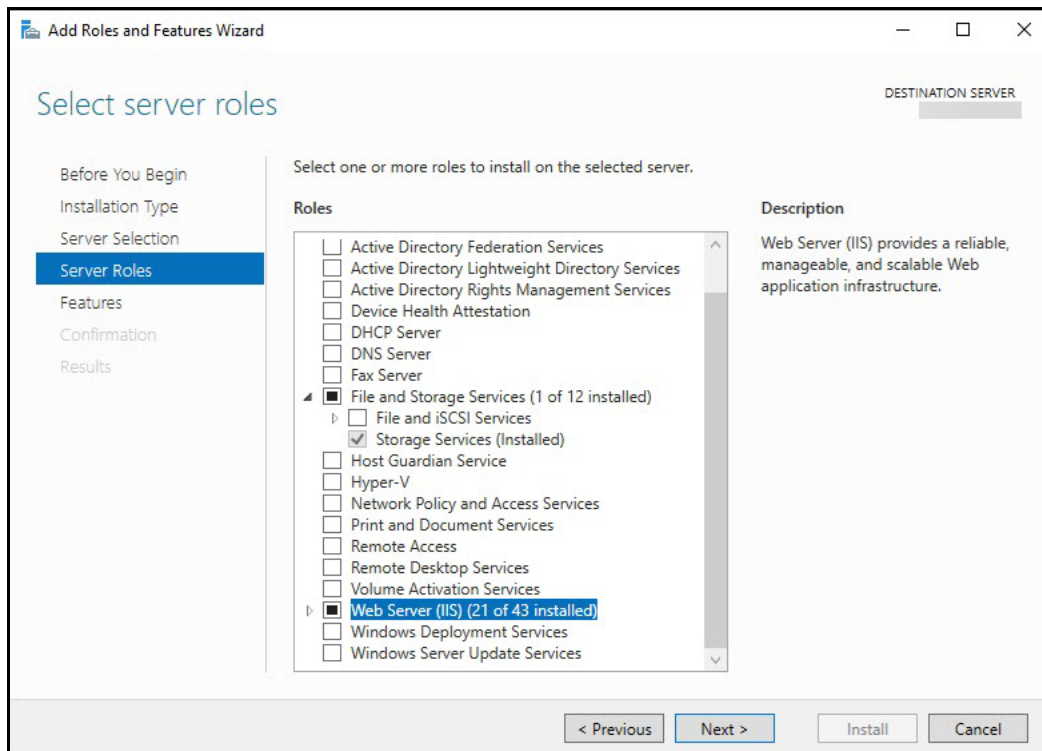
The Select Destination Server page opens.



7 Select a server.

8 Click **Next**.

The Select Server Roles page opens.

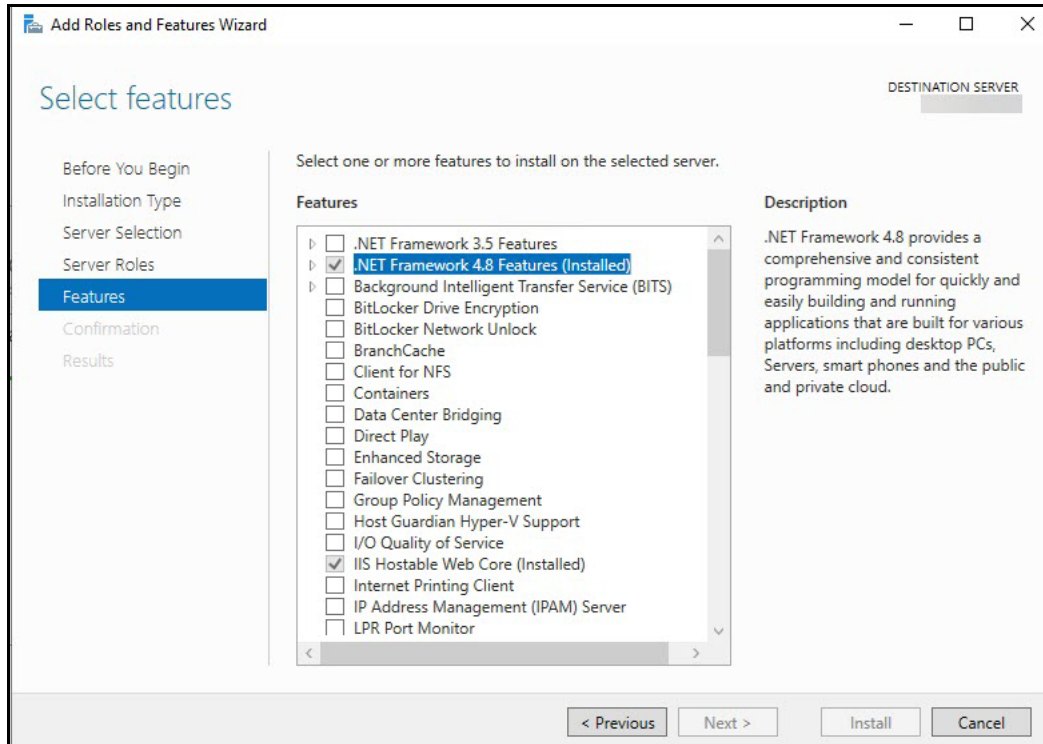


9 From the Server Roles list, select the following roles:

- **File Services**
- **Web Server (IIS)**

10 Click **Next**.

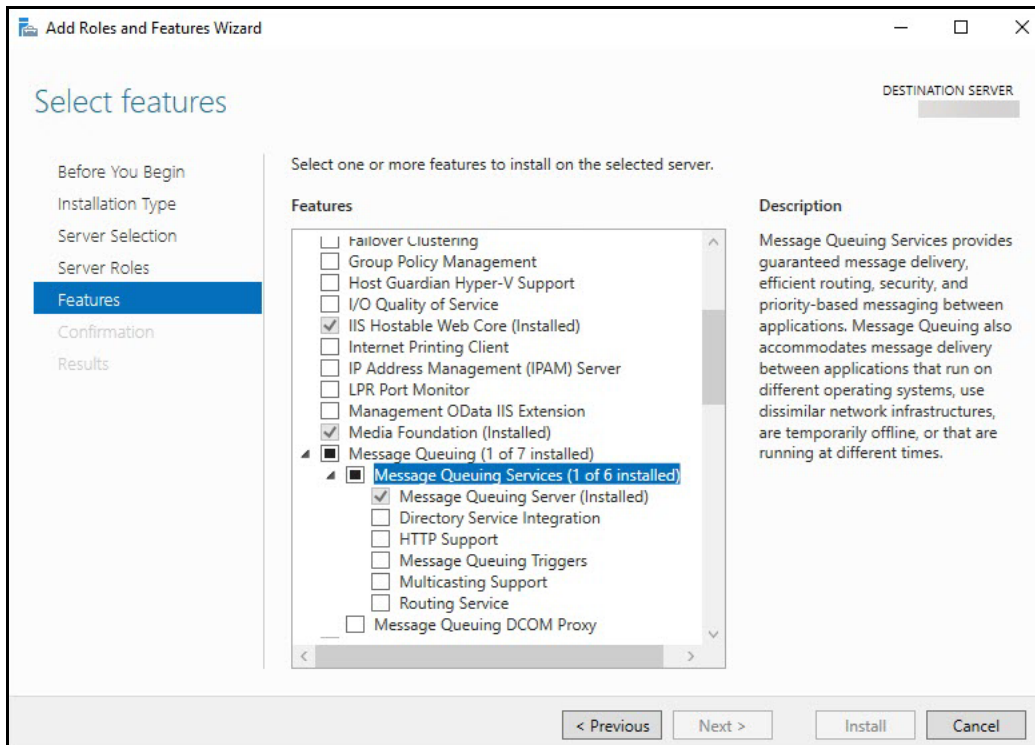
The Select Features page opens.



11 Select the following features:

- **.NET Framework 4.8 Features** and all of its child nodes
- **WCF Services** and all of its child nodes
- **IIS Hostable Web Core** and **Media Foundation**

- 12** Verify that **Message Queuing Services** and **Message Queuing Server** are enabled.



- 13** Use the scroll bar to verify the **Windows Process Activation Service** is enabled with the following child nodes:

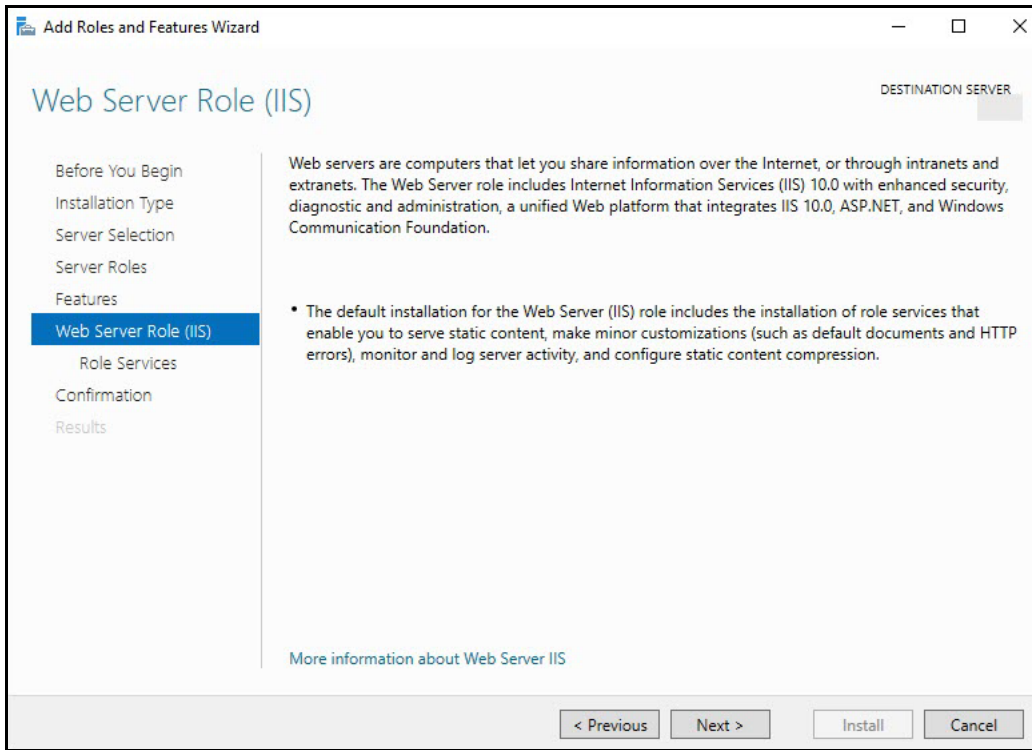
- **Process Model**
- **Configuration APIs**

- 14** Click **Next**.

Configuring the Web Server Role (IIS)

The Web Server Role (IIS) page opens if you have not already installed the web server.

- 1 In the Navigation pane, click **Role Services** under Web Server Role (IIS).



The Select Role Services page opens.

- 2** In the Role Services list, use the scroll bar to select the following services.
If you have already set up the Roles and Features, verify that the following services have been selected.

Node	Child Nodes
Common HTTP Features	Default Document Directory Browsing HTTP Errors Static Content WebDAV - Verify that this option is disabled. Worksoft's RESTful Services will not work correctly if enabled.
Health and Diagnostics	HTTP Logging Request Monitor
Performance	Static Content Compression Dynamic Content Compression
Security	Request Filtering Basic Authentication
Application Development	.NET Extensibility 4.8 Application Initialization ASP ASP.NET 4.8 CGI ISAPI Extensions ISAPI Filters WebSocket Protocol
Management Tools	IIS Management Console IIS Management Scripts and Tools Management Service

- 3** Click **Next**.
The Confirm Installation Selections page appears.
- 4** Click **Install** to install the role services.

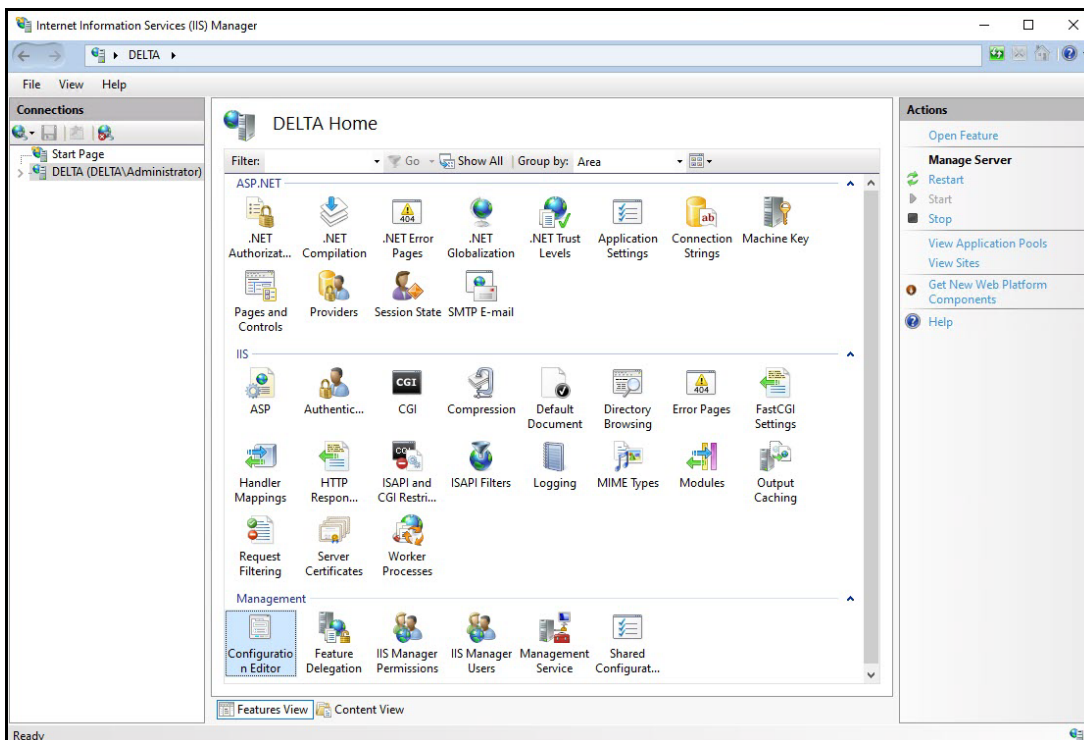
Configuring Application/Json MIME Type Compression

After you have enabled Dynamic Content Compression within IIS, you need to verify HTTP Compression for the application/json MIME type. Worksoft uses Dynamic Content Compression to improve performance, and HTTP compression must be enabled for the application/json MIME type.

When the Dynamic Content Compression feature is enabled, it will overwrite any previous HTTP compression settings.

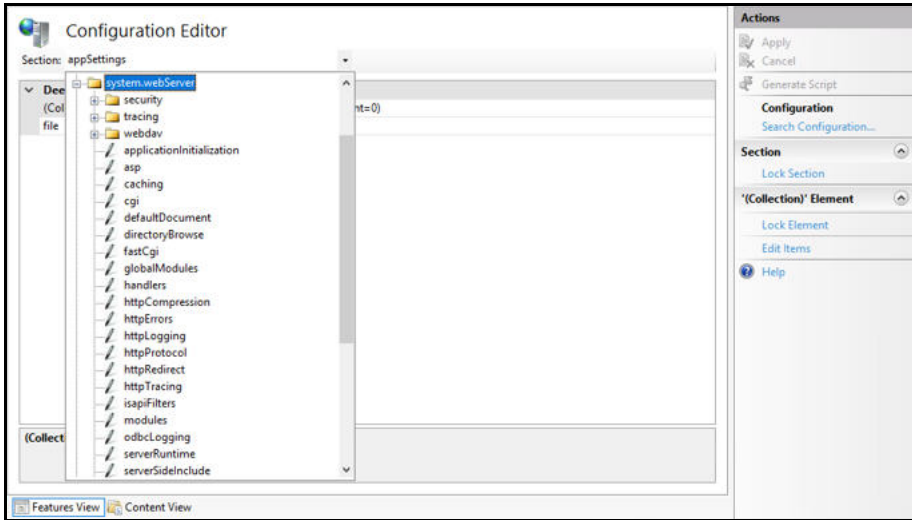
► To verify application/json MIME type compression:

- 1 Open **IIS Manager**.
- 2 In the left Navigation pane, click on your server.
- 3 In the Management section, double-click the **Configuration Editor**.

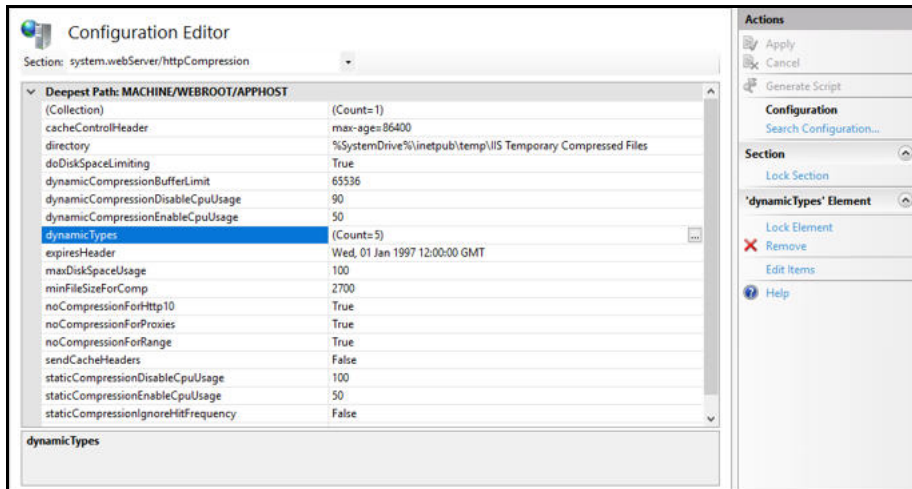


The Configuration Editor opens.

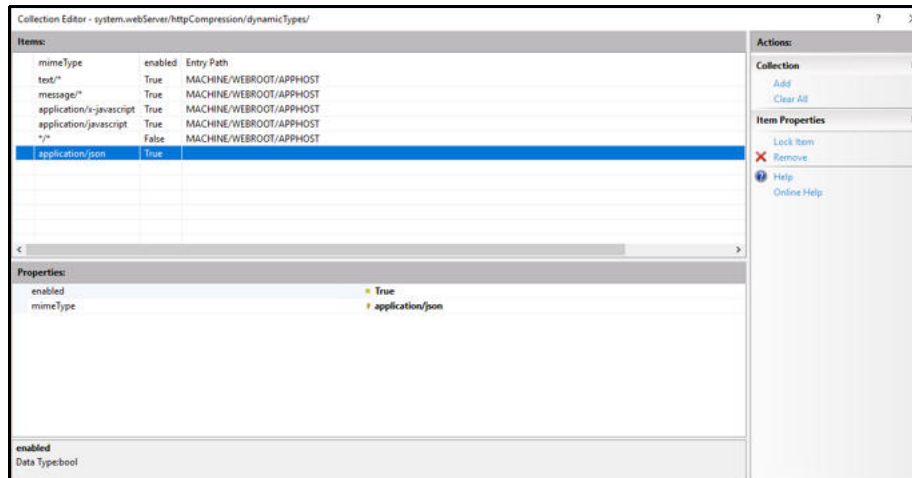
- 4 From the Section drop-down list, select **system.webServer > httpCompression**.



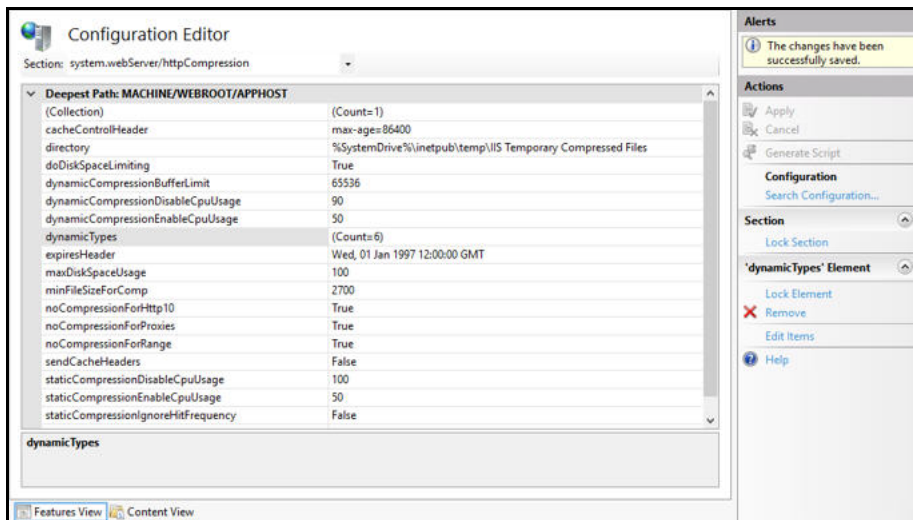
- 5 In the httpCompression section, click **dynamicTypes**.



- 6 Verify that **application/json** is listed in the dynamic compression mime types. If it is not listed, click the **Add** button in the Collection section to add it.



- 7 After you completed your verification or addition, click the **Close** button
The Configuration Editor opens.



- 8 Click **Apply** to apply your changes.
- 9 Verify that dynamicTypes lists a count of six.
- 10 Close the editor.

Enabling IIS Services

You will now need to verify that several IIS services are enabled.

► **To verify IIS services are enabled:**

- 1 If the Server Manager is not open, select **Administrative Tools > Server Manager** from the Start menu.
The Server Manager opens.
- 2 In the Navigation pane, select **IIS**.
- 3 Scroll down to the Services section.
- 4 In the Services pane, verify that the following services are enabled and running:
 - **World Wide Web Publishing Service**
 - **Web Management Service**
 - **Application Host Helper Service**
 - **Windows Process Activation Service**
- 5 If any of these window services are not running, start the services.
To start a service, select the service from the list and click **Start** in the right menu. You can also start services by going to **Administrative Tools > Services** on your machine.

Configuring HTTPS on Your Application Server

Complete the following tasks to configure HTTPS on your application server:

- ◆ Request an SSL Certificate from your IT department.
- ◆ Add the certificate to IIS.
- ◆ Add new binding to port 443.

Verify your SSL Settings on your application server.



Chapter 2 Installing Worksoft Continuous Testing Manager

In This Chapter

Worksoft Continuous Testing Manager Package	19
Installing Worksoft Continuous Testing Manager	19

Worksoft Continuous Testing Manager Package

The CTM package consists of the following components:

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

Installing Worksoft Continuous Testing Manager

Verify that your environment has the needed system requirements installed before you begin to install CTM. For information about system requirements, see the [Worksoft Help Portal](#).

► 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.

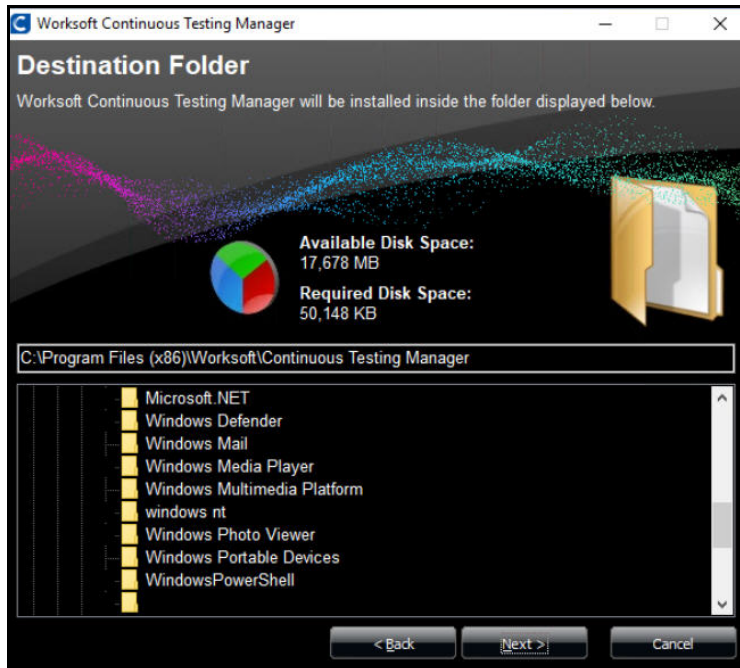
The Other Worksoft Products and Services Dependencies page appears.



3 Verify that these products and services have been installed with the Worksoft Infrastructure Services installer.

4 Click **Next**.

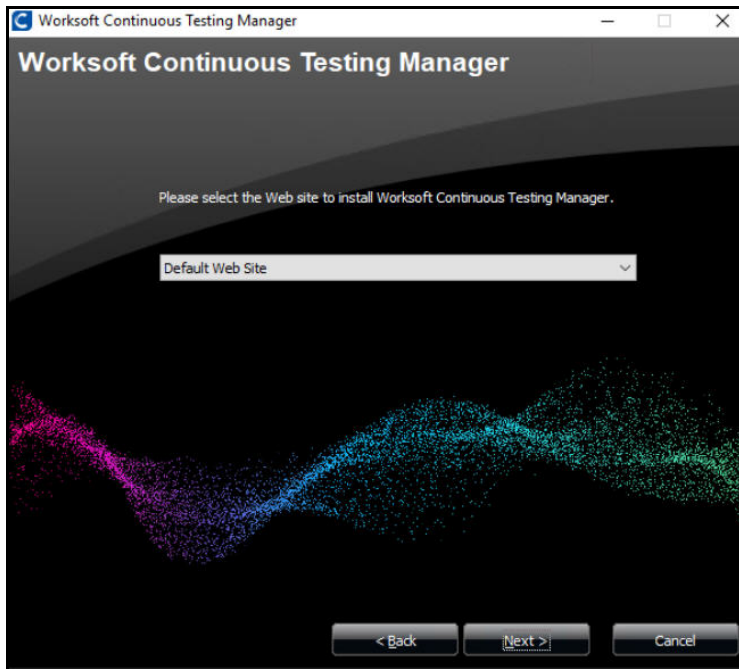
The Destination Folder page appears.



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

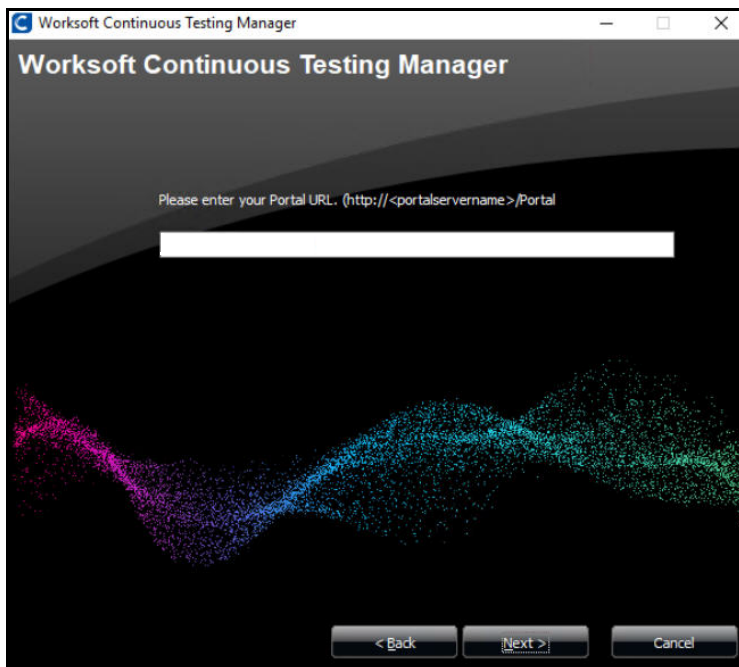
If you do not want to accept the default directory for the installation files, select a different installation directory and click **Next**.

The Worksoft Continuous Testing Manager Web Site page appears.

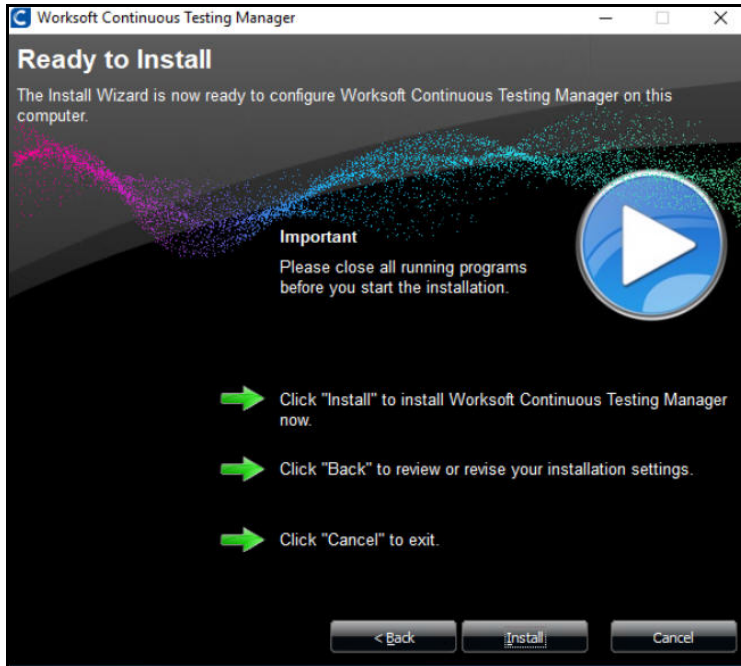


- 6 If you want to accept Default Web Site as your website, click **Next**.
- 7 If you have other websites configured in the IIS, select the server from the drop-down list and click **Next**.

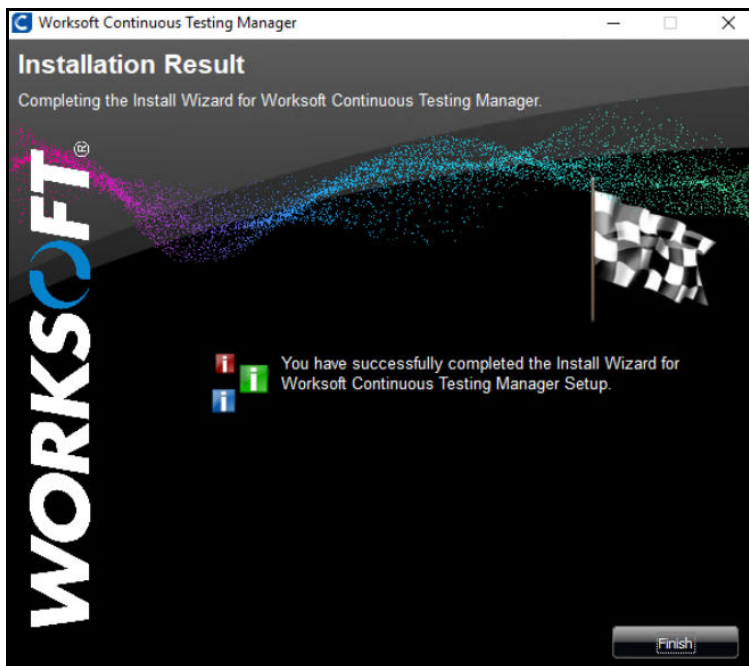
The Worksoft Portal URL page appears.



- 8 Enter the external URL address for 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 appears.



- 10 Click **Install** to begin the installation.
After the installation completes, the Installation Result page appears.



- 11 Click **Finish**.



Chapter 3 Creating the Worksoft Continuous Testing Manager Database

In This Chapter

Registering CTM	24
Creating a CTM Database.....	24

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`

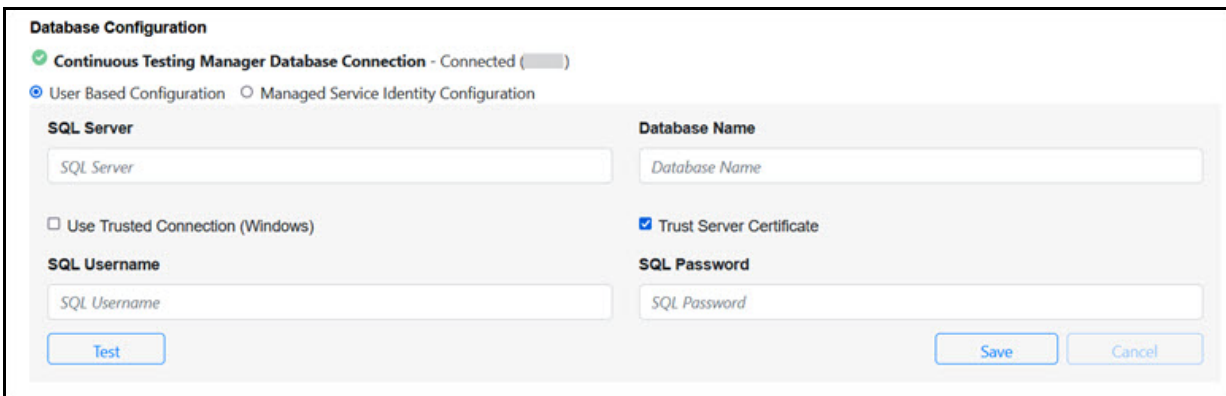
Creating a CTM Database

When you create your CTM database, you can 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.
- In the Database Name field, enter the database name.
- 4 If you want to use Windows authentication, select the **Use Trusted Connection (Windows)** option.
 - 5 If you want to use SQL Server authentication, enter the SQL Server user name and password in the respective fields.

- 6 Select the **Trust Server Certificate** option.
- 7 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.
- 8 Click **OK** to close the message.
- 9 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 4 Installing Worksoft Continuous Testing Manager Agents

In This Chapter

Installing a CTM Agent.....	27
Configuring CTM Agents.....	30

Overview

CTM leverages dedicated client machines that have both Worksoft Certify and CTM Agent installed on them, and it orchestrates the automation of process execution from the full repository of your Certify systems.

Determine how many client machines that you will need by evaluating the quantity of Certify processes that are required to run on a daily basis. Also, you need to figure out the amount of 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 Certify Resources](#).

Warning: Do not install a CTM Agent on a machine that has Orchestrator Agent or Worksoft Execution Manager Agent installed.

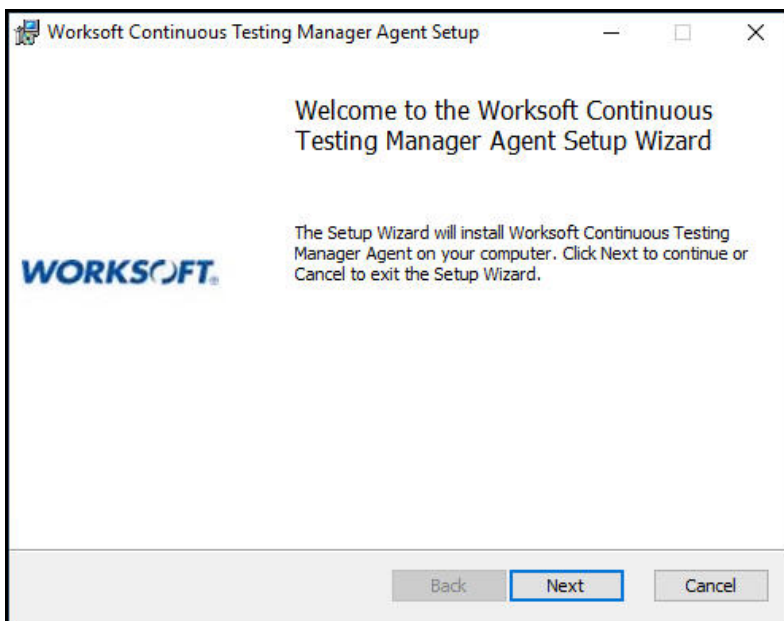
Installing a CTM Agent

Worksoft Continuous Testing Manager Agents are dedicated machines that you are able to schedule and manage remote execution for Worksoft Certify® processes.

► **To install a CTM Agent:**

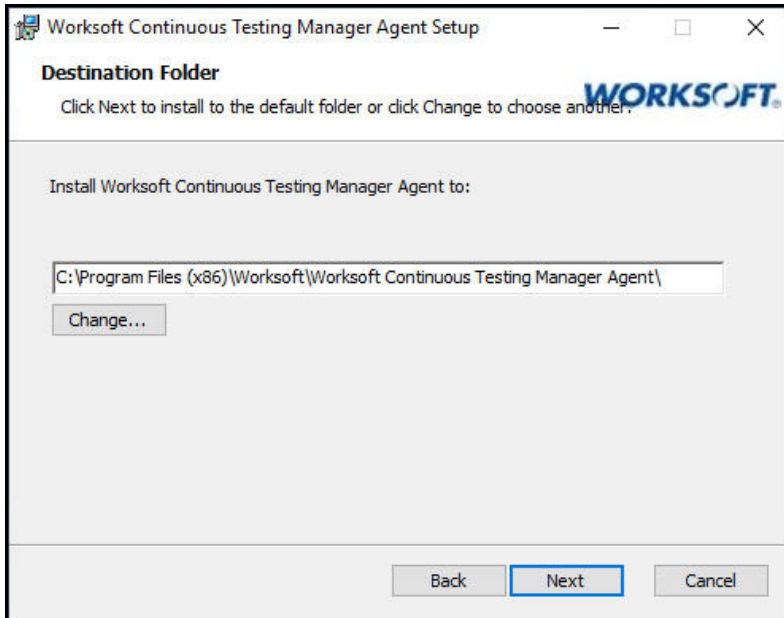
- 1 In your software distribution folder, double-click the **Worksoft Continuous Testing Manager Agent (version).msi** file.

The Worksoft Continuous Testing Manager Agent Setup Wizard opens.



- 2 Click **Next**.

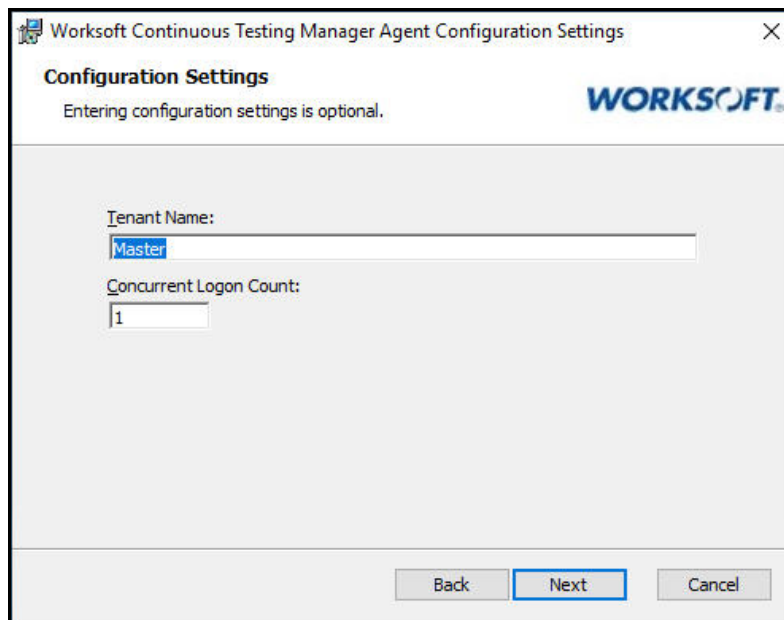
The Destination Folder page appears.



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

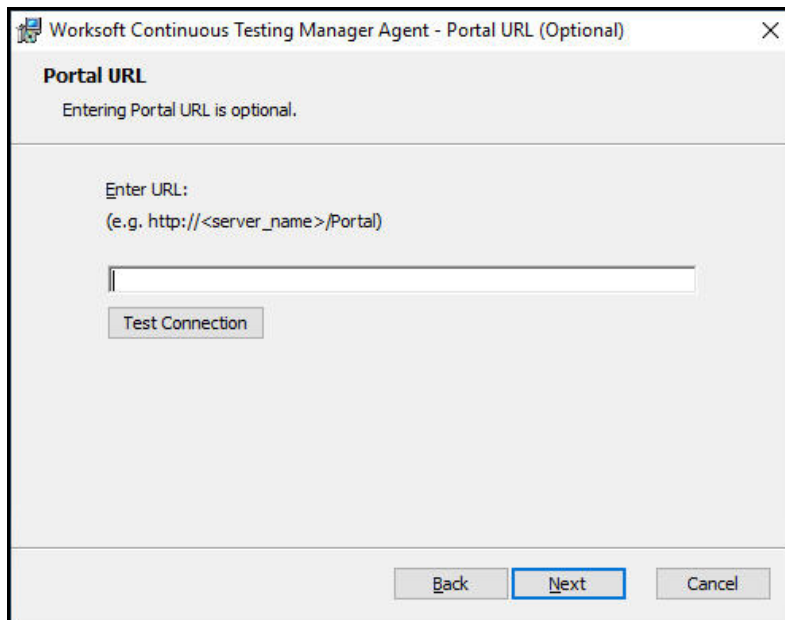
If you do not want to accept the default directory for the installation files, click the **Change** button to select a different installation directory, and then click **Next**.

The Configuration Settings page appears.



- 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 appears.

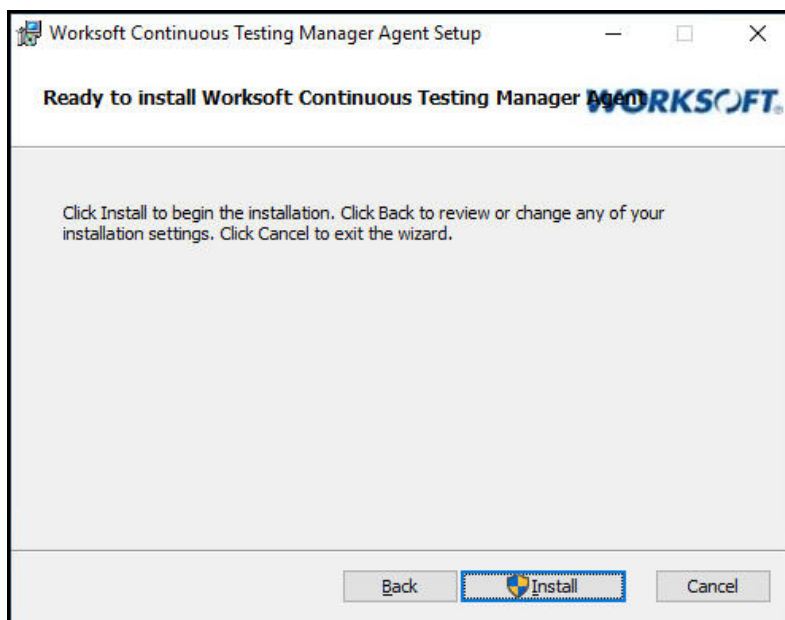


- 7 Enter the Worksoft Portal URL.

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

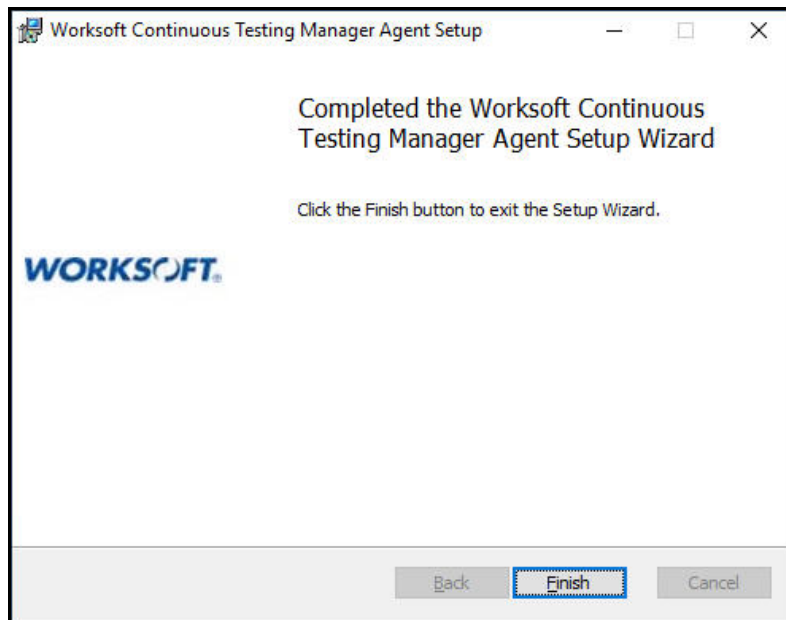
- 8 Click **Test Connection** to test the connection.
- 9 Click **Next**.

The Ready to Install page appears.



- 10 Click **Install**.

The Completed Installer Setup Wizard page appears.



11 Click **Finish**.

The CTM Agent installation is complete, and it will start by default.

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

Configuring CTM Agents

The desktop machine where CTM Agent is installed needs to have Remote Desktop Protocol (RDP) configured. If you have a Citrix environment, the Citrix server must be configured to support RDP sessions. 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 user name 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
```