



Software Robots - the Virtual Workforce

Installing v5.0 for Local Training

USER GUIDE

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1. Introduction

This document provides guidance on the process to follow when carrying out an installation of Blue Prism in preparation for local Foundation, Surface Automation or Product Induction training courses.

1.1. Pre Requisites

Blue Prism will require a remote SQL Server database or a local SQL Express database to have been installed. The user will require privileges within the database to create databases.

If you are installing an SQL Express database to support the training please accept the default authentication method (Windows Authentication) and default instance name (SQLEXPRESS). If you specified SQL Authentication please make sure you have an ID and password with privileges to create a database.

2. Step-by-step Installation

2.1. Install Blue Prism

Locate and run the appropriate installer depending on whether you wish to install a 32-bit or 64-bit version. .

- 32-bit Installer: BluePrism5.0.nn_x86.msi
- 64-bit Installer: BluePrism5.0.nn_x64.msi

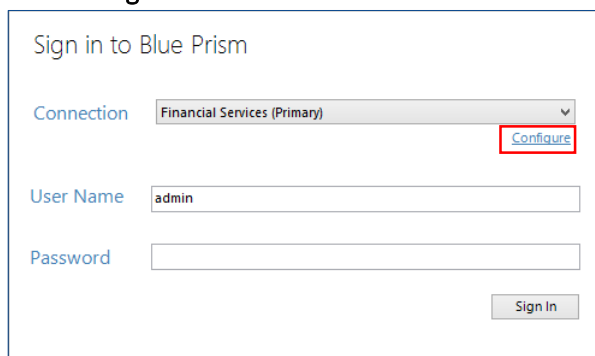
When the installation is complete, start the Blue Prism application.

2.2. Configure a Connection to the Database

When Blue Prism is launched for the first time it is necessary to specify the database connection details. The connection details describe how Blue Prism will connect to the database.

For training environment creation, we will create a **direct connection** to the SQL database server.

1. Click **Configure**. This will launch the wizard that can be used to provide the connection information.



Sign in to Blue Prism

Connection: Financial Services (Primary) [Configure](#)

User Name: admin

Password:

Sign In

- a. The Connection Configuration window is now displayed.

When the SQL Express database was installed you will probably have accepted the default authentication method (Windows Authentication) and default instance name (SQLEXPRESS).

If so, enter the details as below:

Connection Name: **Blue Prism Training**
Connection Type: **SQL Server (Windows Authentication)**
Database Server: **localhost\SQLEXPRESS**
Database Name: **BluePrismTraining**

Current Connection

Connection Name	<input type="text" value="Blue Prism Training"/>
	<small>The name by which this connection will be remembered</small>
Connection Type	<input type="button" value="SQL Server (Windows Authentication)"/>
	<small>The type of connection to use</small>
Database Server	<input type="text" value="localhost\SQLEXPRESS"/>
	<small>The hostname of the database server</small>
Database Name	<input type="text" value="BluePrismTraining"/>
	<small>The name of the database to connect to</small>

If you used alternative instance name to SQL Express amend the database server name in the connection settings accordingly.

If you want to use SQL Authentication please set the connections setting as follows:

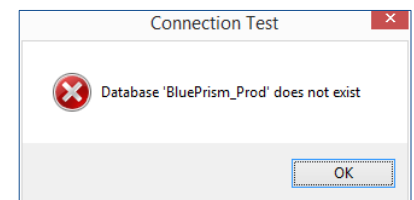
Connection Name: **Blue Prism Training**
 Connection Type: **SQL Server (SQL Authentication)**
 Database Server: **localhost\SQLEXPRESS**
 Database Name: **BluePrismTraining**
 User ID: **{username}** - *The username configured in SQL for authenticating with the database).*
 Password: ********* - *The password for authenticating with the database*

2. Click **Test Connection**.

If a connection can be established with the SQL Server, commonly one of the following messages will be presented.

a. **Database does not exist**

This indicates that the database has not yet been created.



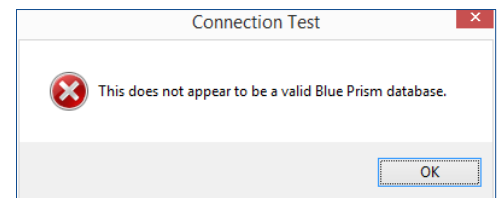
Press **OK** to clear the message, and press **OK** to save the connection data. A similar message may be repeated when the connection window closes.

Follow the actions within the following section:

Create a Blue Prism Database

b. **Not a valid Blue Prism Database**

This indicates that the database exists, but that it cannot be verified as a Blue Prism database. This would typically be the case where the database has been manually created but has not had the Blue Prism schema applied.



Press **OK** to clear the message, and press **OK** to save the connection data. A similar message may be repeated when the connection window closes.

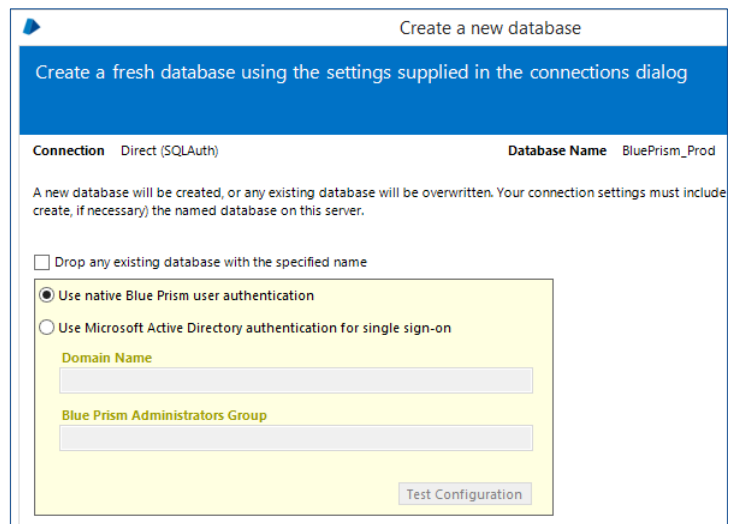
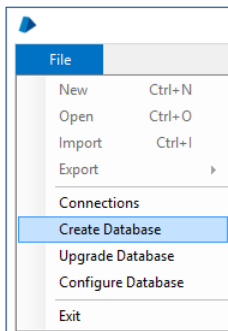
Follow the actions within the following section:

Create a Blue Prism Database

2.3. Create a Blue Prism Database

Once the connection has been created, a SQL Server database must be created. This can be achieved through use of the in-product **Create Database** action.

1. Select **File** from the menu.
2. Click Create Database
3. Complete the default settings.
4. Click **OK** to create the database.



2.4. Set the Admin Password

When a new Blue Prism database is created, a single user is created with the credentials:

Username: admin

Password: admin

Launch Blue Prism and log in using the above credentials. You will be prompted to change the admin password – enter a secure password and make a note of it.

2.5. Install the License

In order to enable the software it is necessary to install a valid license file. License files can be obtained via an Account Manager.

1. Launch Blue Prism.
2. Click System Manager.
3. Click the **System** menu item.
4. Click the **License** tab.
5. Select **Install new licence**.

Select the License file and click OK.

