



AgileForms Integration Guide

AgilePoint BPMS v5.0 SP2

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Contents

- Preface.....3**
 - Disclaimer of Warranty.....3
 - Copyright.....3
 - Trademarks.....3
 - Government Rights Legend.....3
 - Virus-free software policy.....3
 - Document Revision Numbers.....4
 - AgilePoint Documentation in PDF and HTML.....4
 - Contacting AgilePoint Sales.....4
 - Contacting Customer Support.....5
- AgileForms.....6**
- Pre-Installation.....7**
 - Set Up IIS.....7
 - Set Up IIS 7.0.....7
 - Set Up Database.....7
- Installation.....8**
 - Install AgileForms Server.....8
 - Set Up the PDF Generator.....8
 - Configure AgileForms Server.....9
 - Activate AgileForms Server.....10
 - Set up the AgileForms Impersonator.....11
 - Installing AgileForms Envision Add-on.....11
 - (Distributed Environments Only) Edit Registry Keys for AgileForms Envision Add-On.....12
 - Installing AgileForms SharePoint Integration.....12
 - Remaining Steps for Manual Installation.....13
 - Configuring AgileForms SharePoint Integration v2.....13
 - Configuring AgileForms SharePoint Integration v1.....14
 - Configuring AgileForms Back Office Integration.....14
- Using AgileForms.....15**
 - Envision Add-On for AgileForms.....15
 - AgileForms Stencil.....15
 - Creating Repeating Tables in AgileForms.....24
 - AgileForms Process Initiator Web Part.....24

Preface

Disclaimer of Warranty

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Virus-free software policy

AgilePoint recognizes that viruses are a significant security consideration for our customers. To date, we have had no report of AgilePoint BPMS carries any virus. AgilePoint takes the following measures to ensure our software is free of viruses upon delivery:

- AgilePoint is built on top of Microsoft .NET framework. The pre-compiled executable is a .NET Common Language Runtime (CLR) application, not a native machine binary. As far as is known at this time, there are no viruses that infect .NET CLR executables.
- The virtual environment for the product packaging process is fully isolated and protected, and anti-virus software is installed and running during packaging.
- The deliverable package is scanned by anti-virus software before upload to our customer download site.

Document Revision Numbers

AgilePoint documentation uses the revision number format **rX.Y.Z**. The letters and numbers in this revision number can be interpreted as follows:

- **r** - Indicates "revision." This helps to differentiate the document *version* numbers, which start with **v**.
- **X** - The major version number for AgilePoint BPMS to which this document refers. For example, AgilePoint releases 5.0, 5.0 SP1, and 5.5 would all have an **X** value of **5**.
- **Y** - The major document revision number. This number typically changes only when either there is a new AgilePoint release, or there are major changes to the document.
- **Z** - The minor document revision number. This number is incremented each time the document is republished.

AgilePoint Documentation in PDF and HTML

AgilePoint documentation is provided in both print-friendly (PDF) and web-based (HTML) formats.

Advantages of HTML Documentation

- HTML is the **primary delivery format** for AgilePoint documentation.
- Unified, global **search** across all documentation. PDF documents allow you to search only within the context of a given PDF file.
- **All hyperlinks supported**. Links in PDFs are only supported in certain contexts.
- "One-stop shopping" for all information related to AgilePoint BPMS.
- The HTML documentation is updated more frequently than the PDF documentation. Web-based documentation is updated periodically between AgilePoint releases to address errors and omissions, but the PDF documentation is updated only at the time of a software release.

Advantages of PDF Documentation

PDFs can be more easily **printed**, **archived**, and **transferred** (such as by FTP or email) than HTML documentation.

For more information, see [Downloading Files and Sharing Links from the Documentation Library](#) on the [AgilePoint Support Portal](#).

Contacting AgilePoint Sales

AgilePoint is a leading Business Process Management System (BPMS) provider created by a team of driven people who strive to incorporate the principles of relentless innovation for the benefit of our customers. Our mission is to help companies of any size attain and sustain operational success through process excellence.

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Contacting Customer Support

To contact AgilePoint Support, please submit a ticket on the AgilePoint Support Portal: <http://support.agilepoint.com/SupportPortal/>

If you do not have a Support Portal account, you can send an email to request one: support@agilepoint.com

AgileForms

AgileForms is an AgilePoint product that enables AgilePoint BPMS users to create web-based forms using a graphical user interface (GUI).

AgileForms is built on XML and is fully standards compliant. However, it does not require programming knowledge to use.

Pre-Installation

Before installing AgileForms Server, perform the procedures in this section on the AgileForms Server machine.

Set Up IIS

1. In **IIS**, create a web site to serve as the AgileForms proxy. Give the site the name **AFProxy** and the port number **55551**.
2. Enable **Anonymous Authentication** for AFProxy.
3. Create an application pool for AgileForms.
4. Set up the application pool identity to use a custom account, and set the credentials to use the AgilePoint service account.
5. Create the main AgileForms website with the name and port number of your choice.
6. Set the web site to use the application pool you created for AgileForms.
7. Disable **Anonymous Authentication** for the site.
8. Enable **Integrated Windows Authentication** for the site.

Set Up IIS 7.0

In IIS 7.0, do the following before you install AgileForms:

1. On the AgileForms Server machine, open the file C:\Windows\System32\inetsrv\config\ApplicationHost.config
2. Modify the following value:
 - **Old value** - `<section name="httpErrors" overrideModeDefault="Deny" />`
 - **New value** - `<section name="httpErrors" overrideModeDefault="Allow" />`
3. Save and close ApplicationHost.config.

Set Up Database

1. In **SQL Server**, create 3 empty databases with the following names:
 - **Site_Master**
 - **Site_Template**
 - **Auth_Template**

Installation

This section provides instructions for installing the AgileForms add-on components of the AgilePoint BPMS Suite.

Install AgileForms Server

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgileForms installer. The AgileForms installation window appears.
3. Click the **Install AgileForms...** link that is most appropriate for your system.
4. Click the link for **AgileForms Server**.
5. On the **AgileForms Server** window, click **Next**.
6. On the **Welcome to AgileForms Server Setup Wizard** window, click **Next**.
7. On the **License Agreement** window, read the License agreement, and click **I Agree** to continue. Then click **Next**.
8. On the **Select Installation Folder** window, select an alternate installation folder if desired, then click **Next**.
9. On the **Confirm Installation** window, click **Next**. Once the installation is complete, **AgileForms WebSite Configuration** dialog appears.
10. On the **AgileForms Websites Configuration** dialog box, verify the following information. When you have finished, click **OK**:
 - **AgileForms Site** – The main site for AgileForms.
 - **Proxy Site** – AgileForms proxy site.
 - **User Name** – The user name (in the format – Domain\Username) for the AgileForms service.
 - **Password** – The password for the AgileForms service.
11. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.
12. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

Set Up the PDF Generator

Most AgilePoint users who generate PDFs use AgilePoint's PDF Generator AgilePart. However, it is possible to use the built-in PDF generator module for AgileForms, as well. This method simply requires some additional setup.

If you want to use the AgileForms PDF Generator, complete the procedures in this topic. Note that this is **optional**, depending upon the requirements for your organization.

Register the PDF Generator

To register the PDF Generator for AgileForms:

1. Open the folder **[AgileForms Server Installation]\FS2\Forms\pdfgen**.
2. Double-click the registration file that is appropriate for your system to add it to the registry:
 - **32 bit** - ABCpdfRegistration.reg
 - **64 bit** - ABCpdfRegistration64bit.reg

Update the Print CSS Location

To update the print CSS location:

1. In a text editor, open the file **[AgileForms Server Installation]\Agileforms Server\FS2\overrides.txt**.
2. In overrides.txt, add the following line, replacing [hostname] and [port] with the information for your AgileForms Server machine:


```
Forms/print_css_location: "http://[hostname]:[port]/js/print.css"
```
3. Restart the Windows service named **Firmstep**.

Configure AgileForms Server

Once you have installed AgileForms Server, configure the AgileForms Server software.

1. To open the AgileForms Server Configuration dialog box, click **Start > All Programs > AgilePoint > AgileForms > AgileForms Configuration**.
2. On the AgileForms Configuration Manager dialog box, modify the information on the **System** tab and **Database** tab as required.
3. When you have completed the configuration, click **OK**.

System Tab

Field Name	Definition
Server URL	URL of the AgilePoint Server.
Domain	The domain name for the AgilePoint Server.
User Name	The user name for the AgilePoint Server.
Password	The password for the AgilePoint Server.
Hosting Mechanism	IIS or Windows Service, depending on your AgilePoint Server installation type.

Field Name	Definition
AgileForms Designer Host	Host name and port number for the main AgileForms web site in the format [hostname]:[port] . Example: agileformsite:9000
AFUser Always Anonymous	Select if you want the administrator account for AgileForms to log on as anonymous.
LDAP	The LDAP path to your Active Directory – for example, LDAP://dc=MyCompany,dc=com.
LDAP User	The user name for accessing Active Directory.
LDAP Password	The password for accessing Active Directory.

Database Tab

Field Name	Definition
User	The user name for connecting to the database.
Password	The password for the user needed for a database connection.
Integrated Security	Select Integrated Security to use Windows authentication for a database connection.
Database Server	Specify the database server name, and click Retrieve database to populate the database lists.
SiteMasterDB	Select the Site_Master database.
Site DB	Select the Site_Template database.
Auth DB	Select the Auth_Template database.
Run Database Scripts	Select Run Database Scripts if you want to generate tables automatically.

Activate AgileForms Server

Once you have installed AgileForms Server, activate the AgileForms Server software:

1. Click **Start > All Programs > AgilePoint > AgileForms > AgileForms Server**.

2. On the AchieveForms activation page, follow the on-screen instructions to activate AgileForms.

Set up the AgileForms Impersonator

To complete the AgileForms installation, complete the following procedure on the **AgilePoint Server** machine:

1. To open the **AgilePoint Server Configuration** tool:
 - On an IIS installation, click **Start > AgilePoint > AgilePoint Server Configuration**.
 - On a Windows Service installation, in the **AgilePoint Server Manager**, select the Windows Service you want to configure, and click the **Configuration** icon.
2. On the **AgilePoint Server Configuration** tool, click the **Extension** tab.
3. On the **Extension** tab, click **Add**.
4. In the **Name** field, enter **AgileForms**.
5. In the **Impersonator** field, enter the user name for the AgilePoint system administrator in the format [domain\username].
6. Click **OK**.

Installing AgileForms Envision Add-on

To complete the AgileForms installation, complete the following procedure on each **AgilePoint Envision client** machine:

1. Login to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgileForms...** link that is most appropriate for your system.
4. Click the **AgileForms Envision Add-on** link that is most appropriate to your system.
 - If you are installing AgileForms in 32-bit mode, there is only one link available.
 - If you are installing on AgileForms in 64-bit mode, you must select whether your Visio installation is 32-bit or 64-bit.
5. On the **AgileForms Envision Add-On** window, click **Next**.
6. On the **Welcome to AgileForms Envision Add-On Setup Wizard** window, click **Next**.
7. On the **License Agreement** window, read the License agreement, and click **I Agree** to continue. Then click **Next**.
8. On the **Select Installation Folder** window, select an alternate installation folder if desired, then click **Next**.
9. The installer is now ready to install the AgileForms Envision Add-On. Click **Next** to install.
10. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.

11. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.

(Distributed Environments Only) Edit Registry Keys for AgileForms Envision Add-On

If you are installing AgileForms Envision Add-On in a distributed environment where Envision is running on a machine that is different from the AgileForms Server machine, you must perform the following steps.

1. On the machine where you installed the AgileForms Envision Add-On, open the Windows Registry Editor.
2. In the Registry Editor, navigate to one of the following locations:
 - 32-bit AgilePoint Envision on a 64-bit machine: **HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\BWS\Firmstep2API\AuthKey**
 - 32-bit AgilePoint Envision on a 32-bit machine: **HKEY_LOCAL_MACHINE\SOFTWARE\BWS\Firmstep2API\AuthKey**
 - 64-bit AgilePoint Envision on a 64-bit machine: **HKEY_LOCAL_MACHINE\SOFTWARE\BWS\Firmstep2API\AuthKey**
3. In a web browser, navigate to following **URL**: **http://[AgileFormHost]:Port/AFInt/au/default.aspx/ShowPasskey/**, and copy your authorization code for AchieveForms.
4. In the **AuthKey** registry key, paste the authorization code you copied in the **Authorization code** field.

Installing AgileForms SharePoint Integration

1. Log on to Windows using a user login that belongs to the local system's Administrators group.
2. Double-click **setup.exe** to run the AgilePoint installer. The AgilePoint installation window appears.
3. Click the **Install AgileForms...** link that is most appropriate for your system.
4. Click the link for **AgileForms SharePoint Add-On for AgilePoint SharePoint Integration v1** or **v2**, depending on the SharePoint Integration version you have installed.
5. On the **AgileForms SharePoint Integration** window, click **Next**.
6. On the **Welcome to AgileForms SharePoint Integration Setup Wizard** window, click **Next**.
7. On the **License Agreement** window, read the License agreement, and click **I Agree** to continue. Then click **Next**.
8. On the **Select Installation Folder** window, select an alternate installation folder if desired, then click **Next**.
9. On the **Confirm Installation** window, click **Next**.
10. Once the **Installation Complete** message is displayed, click **Close** to complete the installation.

11. If you see a **Setup succeeded** message, click **OK**. If you see a **Setup has completed. Would you like to reboot now?** message, you can click either **Yes** or **No**.
12. Do one of the following:
 - If you are installing the AgilePoint SharePoint Integration via the AgilePoint installer, click the **SharePointV2IntegrationSetup.exe** located at C:\Program Files\AgilePoint\AgileForms Integration for SharePoint\.
 - If you prefer to install the AgilePoint SharePoint Integration via command prompt, go to [Remaining Steps for Manual Installation](#).
13. The installer verifies the system requirements, once the checks have passed, click **Next**.
14. On the Select Web Applications window, select the SharePoint Web Applications for which to deploy the AgilePoint SharePoint Integration solutions and click **Next**.
15. The Deployment Log displays status of the solutions deployment. Click **Close**.

Remaining Steps for Manual Installation

You can skip this section if you are installing the AgileForms SharePoint Integration via the AgilePoint installer.

1. To add the following .wsp SharePoint Solution files to your SharePoint Web Application(s), use the stsadm tool via command line as follows:

(You can find the stsadm.exe at location C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN).

```
stsadm -o addsolution -filename  
AgilePoint.AgileForms.WebParts.wsp
```

2. To deploy the SharePoint Solutions, open SharePoint Central Administration and go to the **Operations** tab. Click on **Solution management** under the Global Configuration section. Deploy AgilePoint.AgileForms.WebParts.wsp to your SharePoint Web Application(s).
3. Execute from command line at the following directory C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN:

```
stsadm -o copyappbincontent
```

4. To activate the SharePoint features, open the SharePoint site, click **Site Actions > Site Settings > Site Collection Features**, and activate AgileForms Web Parts.

Configuring AgileForms SharePoint Integration v2

1. In SharePoint, open the AgilePoint Configuration List.
2. Create a new list item with the following settings:
 - **Application** - AgilePointASPAssociation
 - **AP Setting Key** - AgileForms
 - **AP Setting Value** - http://[agileformsserver]:[port]/FormRender.aspx

Configuring AgileForms SharePoint Integration v1

1. Add the following keys to the **web.config** file for your SharePoint installation:

```
<add key="CustomAgilePointTaskActions"
      value="AgilePoint.AgileForms.CustomTaskListActions.
      AgileFormsCustomTaskListActions,
      AgilePoint.AgileForms.CustomTaskListActions,
      Version= 1.0.0.0, Culture=neutral,
      PublicKeyToken= 4b23e0a5c23bc0" />
<add key="FormRenderURL"
      value="http://[server]:[port]/FormRender.aspx" />
```

Configuring AgileForms Back Office Integration

Executable Configuration

If you want to configure Back Office Integration using the executable configuration tool:

Open the file **AgilePoint.AgileForms.BackOfficeConnector.exe** located at C:\Program Files\AgilePoint\AgileForms Integration for SharePoint\.

Manual Configuration

If you want to install AgileForms Back Office Integration manually:

1. Add the following .wsp SharePoint Solution files to your SharePoint Web Application(s) using the stsadm tool via command line as follows:

(You can find the stsadm.exe at location C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\BIN).

```
stsadm -o addsolution -filename
      FirmstepSharepointConnector.wsp
```

2. To deploy the SharePoint Solutions, open SharePoint Central Administration and go to the **Operations** tab. Click **Solution management** under the Global Configuration section. Deploy **FirmstepSharepointConnector.wsp** to your SharePoint Web Application(s).

Configure Anonymous Authentication

If you want to perform SharePoint lookups from AgileForms, you must do the following:

1. In IIS, navigate to your SharePoint web application.
2. Within the SharePoint web application, open the folder **_layouts > FormStepSharepointAgileConnector**.
3. Set **Anonymous Authentication** to **Enabled**.

Using AgileForms

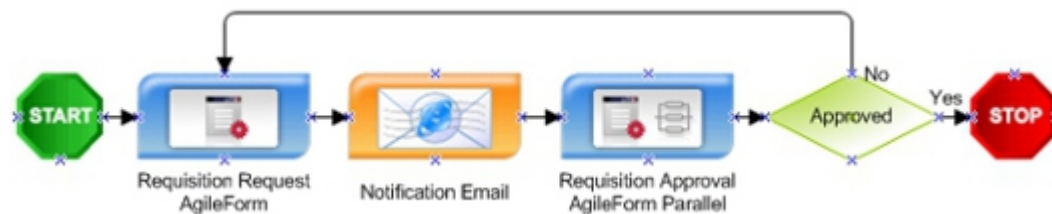
This section provides information about using the AgileForms Integration components within AgilePoint Envision and SharePoint. For information about building forms using AgileForms, see the AgileForms online help. This help documentation is accessible from within the AgileForms Designer user interface.

Envision Add-On for AgileForms

AgileForms comes with an add-on that enables you to create AgileForms-based processes in Envision. This add-on includes an AgileForms process template and an AgileForms Stencil.

To use the AgileForms stencil, you must have the AgileForms Envision Add-On application installed and a live connection to the AgileForms Server.

The following is an example of an AgileForms-based process that uses forms created in AgileForms to support a simple request and approval.



AgileForms Stencil

This section describes the AgileShapes in the AgileForms stencil.

AgileForm Shape

Generates an AgileForm you define. This form appears as an activity in the participant's Task List. For detailed information regarding AgileForms, see the AgileForms Online Help.

Properties for This AgilePart

Field Name	Definition
Edit Form	Opens the AgileForms form editor, which enables you to edit the form. For detailed information about editing forms in AgileForms, see the AgileForms online help.

Field Name	Definition
Export Form	Saves the form as an AgileForms XML form file.
Import Form	Imports an AgileForms XML form file, and replaces the form for this shape with the imported one. All fields from the imported form are added to the form library for the current process.
Preview Form	Opens the AgileForms preview window, where you can preview the form.
SubmitStep	Default value: False This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item).
Transfer Form	Transfers a form from one AgileForm AgileShape to another within a process. If you transfer a form to an AgileShape the current form is overwritten with the one that is transferred.
Edit Library	Opens the AgileForms form library editor. Each field you add to an AgileForm is added to the form library for the process. The fields in a form library are available for use for to all forms within a process.
Export Library	Saves the form as an AgileForms XML form library file.
Import Library	Imports an AgileForms XML form library file.

AgileWork Properties

The properties of the basic AgileWork AgileShape are also included in this AgileShape. For more information, see [AgileWork](#) on the [AgilePoint Support Portal](#).

AgileForm Serial

Generates an AgileForm for serial, or sequential, approvals. This form appears as an activity in the identified participants' Task List.

In a serial approval model, the task cannot move forward until a defined set of participants submits an approval in a specified order. (For approvals that do not require a particular approval sequence, use the AgileForm Parallel AgileShape.) You can define the set of approvers and number of required approvers. All approvers for the AgileForm Serial AgileShape use the same approval form.

For detailed information regarding AgileForms, see the AgileForms Online Help.

Properties for This AgilePart

Field Name	Definition
Approvers	<p>Default value: \$Approvers</p> <p>This property specifies the name of the custom attribute that (initially) contains the user names of the approvers. The usernames should be separated by a semicolon. Each time this AgileShape is entered at runtime, the AgileShape will assign a task to the first username specified by this property. Then the custom attribute associated with this property will be modified to remove the username so that the next username will be assigned the task during the next iteration through the loop.</p>
LoopCondition	<p>Default value: \$HasMoreApprover</p> <p>This property specifies the name of the custom attribute that will be updated each time the AgileShape is exited to indicate whether more Approvers are still waiting to be assigned the task. The value of the specified custom attribute should be checked (using a SingleCondition AgileShape within the loop) to determine whether the loop should be exited or not.</p>
Configuration	<p>This property allows the process modeler to configure the participants for the approval task.</p> <p>Click the Ellipses button to open the configuration dialog.</p>
Edit Form	<p>Opens the AgileForms form editor, which enables you to edit the form. For detailed information about editing forms in AgileForms, see the AgileForms online help.</p>
Export Form	<p>Saves the form as an AgileForms XML form file.</p>
Import Form	<p>Imports an AgileForms XML form file, and replaces the form for this shape with the imported one. All fields from the imported form are added to the form library for the current process.</p>
Preview Form	<p>Opens the AgileForms preview window, where you can preview the form.</p>
SubmitStep	<p>Default value: False</p>

Field Name	Definition
	This property should be set to 'True' if the Form is used as the Submit step (i.e. the first step where you are creating the list item).
Transfer Form	Transfers a form from one AgileForm AgileShape to another within a process. If you transfer a form to an AgileShape the current form is overwritten with the one that is transferred.
Edit Library	Opens the AgileForms form library editor. Each field you add to an AgileForm is added to the form library for the process. The fields in a form library are available for use for to all forms within a process.
Export Library	Saves the form as an AgileForms XML form library file.
Import Library	Imports an AgileForms XML form library file.

AgileWork Properties

The properties of the basic AgileWork AgileShape are also included in this AgileShape. For more information, see [AgileWork](#) on the [AgilePoint Support Portal](#).

AgileForm Parallel

Generates an AgileForm for parallel (non-sequential) approvals. This form appears as an activity in the identified participants' Task List.

In a parallel approval model, the task cannot move forward until a defined set of participants submits an approval. However, the approvers need not approve in any particular order. (For approvals that require a particular sequence, use the AgileForm Serial AgileShape.) Each approver must be defined as an individual participant, using either an ID or a custom attribute. Each participant can also use a unique AgileForm.

For detailed information regarding AgileForms, see the AgileForms Online Help.

Properties for This AgilePart

Field Name	Definition
Configuration	Opens the AgileForm Parallel Configuration Window , where you can configure an AgileForm Parallel approval.
Edit Library	Opens the AgileForms form library editor.

Field Name	Definition
	Each field you add to an AgileForm is added to the form library for the process. The fields in a form library are available for use for to all forms within a process.
Export Library	Saves the form as an AgileForms XML form library file.
Import Library	Imports an AgileForms XML form library file.

AgileWork Properties

The properties of the basic AgileWork AgileShape are also included in this AgileShape. For more information, see [AgileWork](#) on the [AgilePoint Support Portal](#).

AgileForm Parallel Configuration Window

This property allows the process modeler to configure the participants for the approval task and the form each participant sees.

1. Click the **Ellipses** button to open the configuration dialog.
2. On the **Dynamic Parallel Configuration** dialog box, click **Add**, or select a participant and click **Edit**.
3. Add a participant in the **Participant** field. You must use a single participant (as opposed to a role or group), but you can use a custom attribute to identify the participant.
4. Define the form for the approval using the following buttons on this dialog box.

Field Definitions

Field Name	Definition
Edit	Opens the AgileForms form editor, which enables you to edit the form. For detailed information about editing forms in AgileForms, see the AgileForms online help.
Preview	Opens the AgileForms preview window, where you can preview the form.
Export	Saves the form as an AgileForms XML form file.
Import	Imports an AgileForms XML form file, and replaces the form for this shape with the imported one. All fields from the imported form are added to the form library for the current process.
Transfer	Transfers a form from one AgileForm AgileShape to another within a process. If you transfer a form

Field Name	Definition
	to an AgileShape the current form is overwritten with the one that is transferred.

AgileForm Dynamic Group

This AgileShape can be used as similar to the Manual AgileShape, however it facilitates dynamic group functionality. When users are added/removed from a group, the change is persisted at runtime.

Properties for This AgilePart

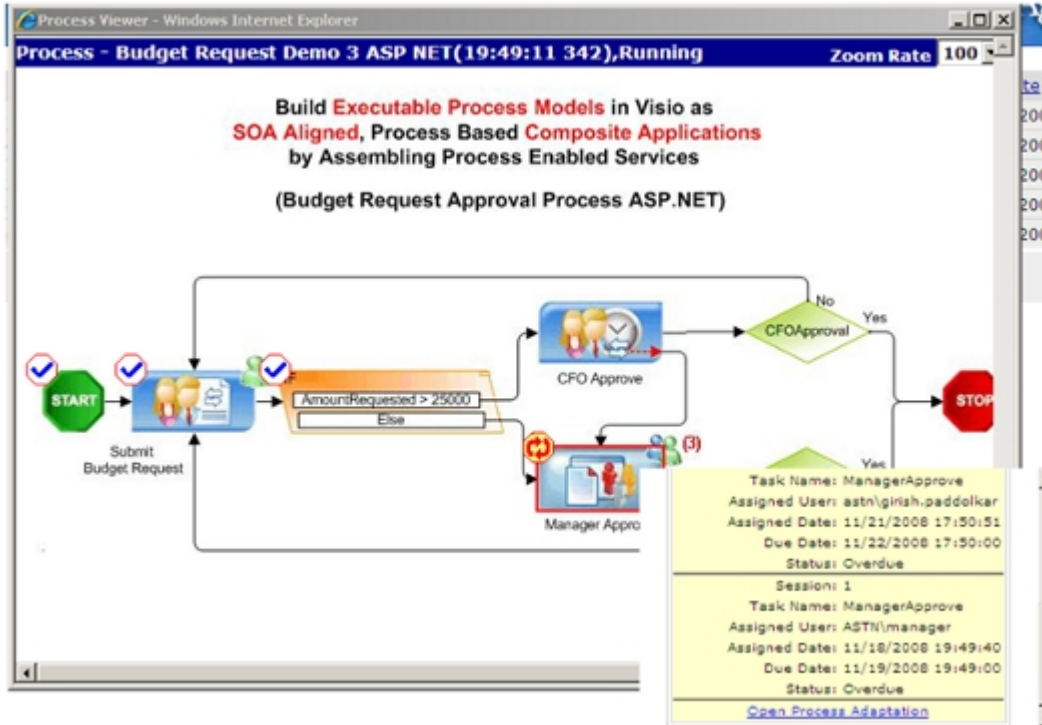
Field Name	Definition
Group/Role	Default value: AgilePointGroup Specifies whether an AgilePoint Group or an AgilePoint Role will be used to perform the work.
Group/RoleName	Specifies the name of the AgilePoint Group or AgilePoint Role that will be used to perform the work.

AgileWork Properties

The properties of the basic AgileWork AgileShape are also included in this AgileShape. For more information, see [AgileWork](#) on the [AgilePoint Support Portal](#).

AgileForm Process Adaptation

This AgileShape is a combination of the Dynamic Parallel, Dynamic Sequential, and Voting AgileWork. It allows for a running process instance to adapt by adding a new participant to complete a task in either a Parallel or Sequential fashion at runtime to support dynamic processes. Manageability at runtime is accomplished either through the AgilePoint Enterprise Manager or the Process Viewer.



To enable the **Open Process Adaptation** link in the Process Viewer, make the following modification to the AgilePoint Web application's web.config file:

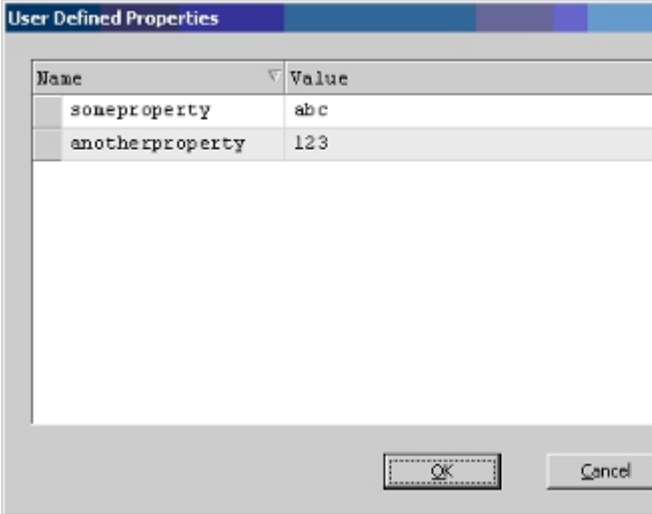
```
<appSettings>
  <add key="ProcessAdaptationUrl"
    value="http://[hostname]:[port]/EnterpriseManager/
ProcessAdaptation/LinkedTasks.aspx" />
</appSettings>
```

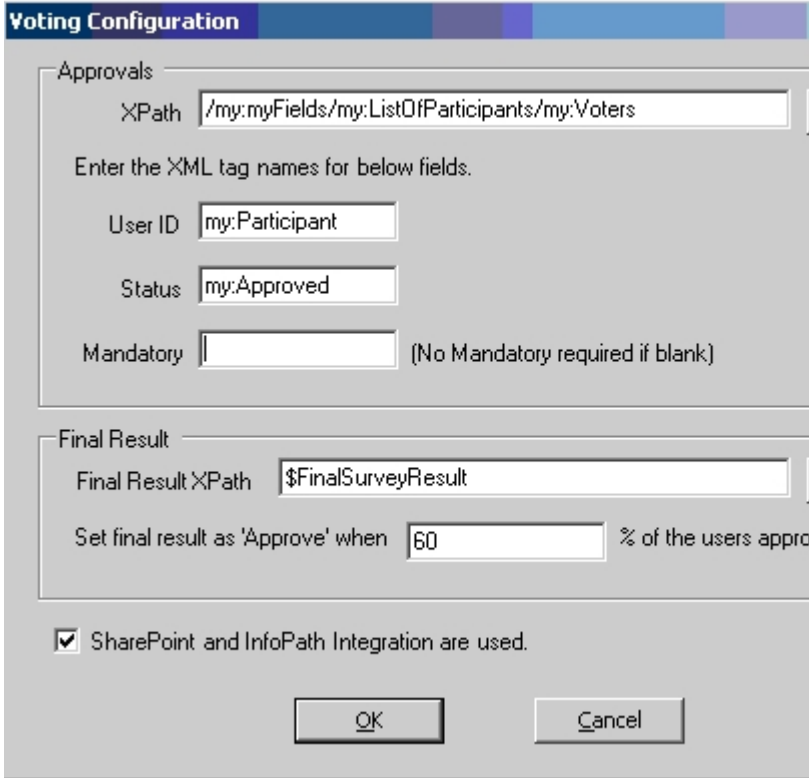
The value for the Process Adaptation is the URL of the process adaptation URL in AgilePoint Enterprise Manager.

For the Process Viewer in SharePoint using AgileForms, add the key entry into the SharePoint web.config at C:\inetpub\wwwroot\wss\VirtualDirectories\8000\web.config.

Properties for This AgilePart

Field Name	Definition
UserDefinedProperties	This property allows the process modeler to configure initial ClientData values that will be associated with the AgileShape's associated task(s) at runtime. This is basically a way of allowing you to specify a set of name/value pairs that are passed to your Web page via an object called a WorkItem. This is an alternative to passing data via URL parameters. In your Web page you can retrieve this data via the ClientData property of the WorkItem. It is then up to you to decide how to use the data.

Field Name	Definition
	<p>Click the Ellipses button to open the configuration dialog.</p> 
Voting Configuration	<p>This property allows the process modeler to configure data binding to the data schema within a repeating table for which to establish the approval data.</p> <p>The "Mandatory" option provides an added level of functionality, requiring any participants that have been identified as "Mandatory" to approve, or the final decision will be not-approved. The final result is also configured here by setting a custom attribute to store the final result and specifying the percentage of participants that will need to approve before the final decision is considered as approved. For example, the process designer specifies the voting percentage as 60%. If 60% of the approvers approve the preceding request, then the final decision is considered as approved.</p> <p>Click the Ellipses button to open the configuration dialog.</p>

Field Name	Definition
	
ApprovalType	<p>The property can be set to Sequential or Parallel at design time. This property determines a runtime whether the task will be delivered in a sequential or parallel fashion to the participants of the task. This can be changed at runtime via AgilePoint Enterprise Manager or the Process Viewer.</p> <p>Sequential means that the task will be delivered in a sequential fashion to 1 participant at a time.</p> <p>Parallel means that all the tasks will be delivered to each of the participants at the same time, there is no particular order for which the task is assigned to the participants.</p>
UpdateCustomAttribute	<p>This property allows the process modeler to configure an update to a custom attribute value based on an event type.</p>

AgileWork Properties

The properties of the basic AgileWork AgileShape are also included in this AgileShape. For more information, see [AgileWork](#) on the [AgilePoint Support Portal](#).

Creating Repeating Tables in AgileForms

For information about creating repeating tables using AgileForms output, see the following AgilePoint KB article:

AgileForms Process Initiator Web Part

AgileForms comes with an add-on that enables you to initiate processes from SharePoint.

AgileForms Process Initiator

HR Process

Budget Request

A SharePoint user can initiate an AgileForms process (any process where the Application property in the process template is set to AgileForms) by clicking the process name in the AgileForms Process Initiator Web Part.

By default, all processes where the Application property in the process template is set to AgileForms are displayed in the Web Part. You can change which processes display, as well as their display names by modifying the Shared Web Part (as shown below).