Enterprise Manager Administrator's Guide

AgilePoint BPMS v5.0 SP2

Document Revision r5.2.4

November 2011

Contents

Preface

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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 in 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 **r*X.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.

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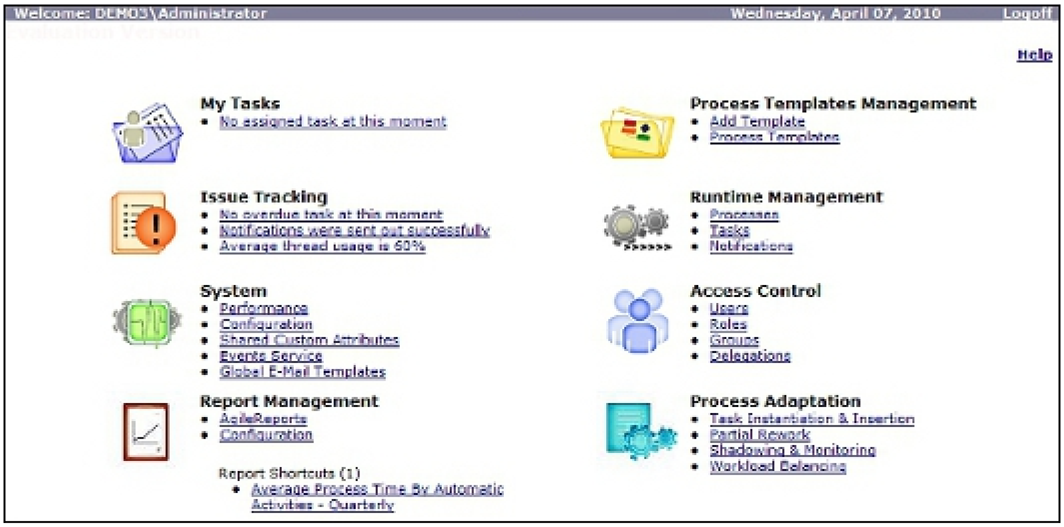
AgilePoint Enterprise Manager

AgilePoint Enterprise Manager is an ASP.NET application that provides a web-based interface for power users or system administrators to manage, monitor, and audit AgilePoint BPMS and its runtime activities and processes.



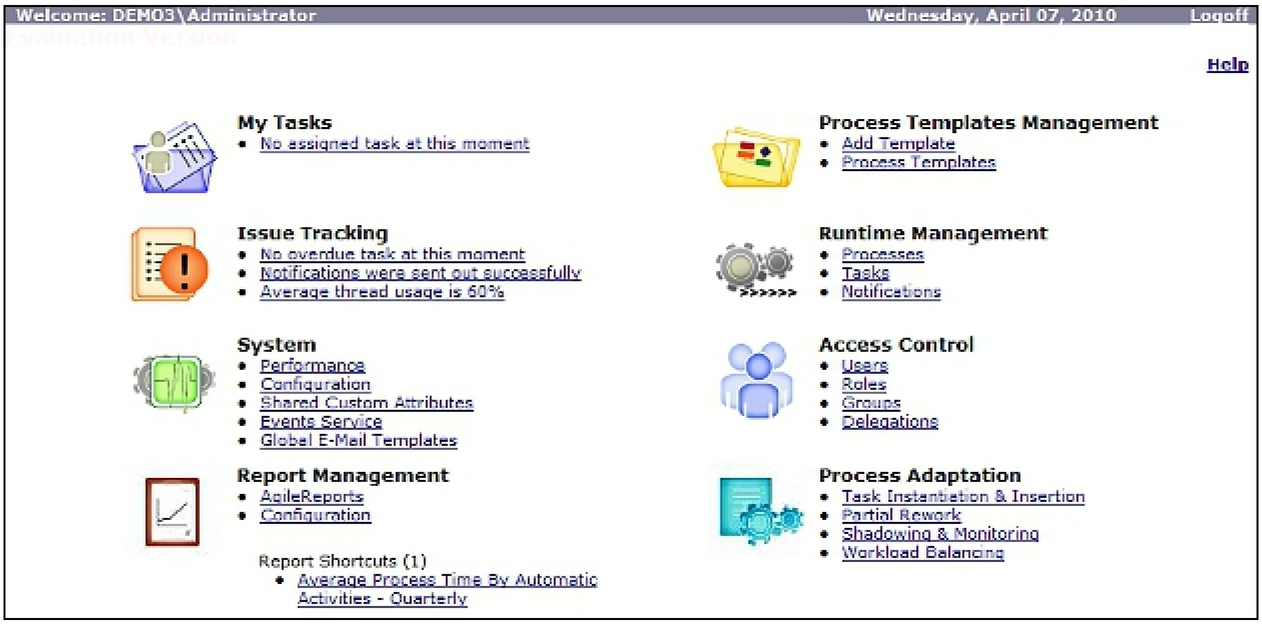
Getting Started

The information in this section provides a brief overview for getting started with the application.

Open Enterprise Manager

To start AgilePoint Enterprise Manager, do the following.

1. Click **Start** > **Programs** > **AgilePoint** > **AgilePoint Enterprise Manager**. The AgilePoint Enterprise Manager Login appears.
2. Enter your Windows account User Name and Password. You will reach the main page of Enterprise Manager as shown below.

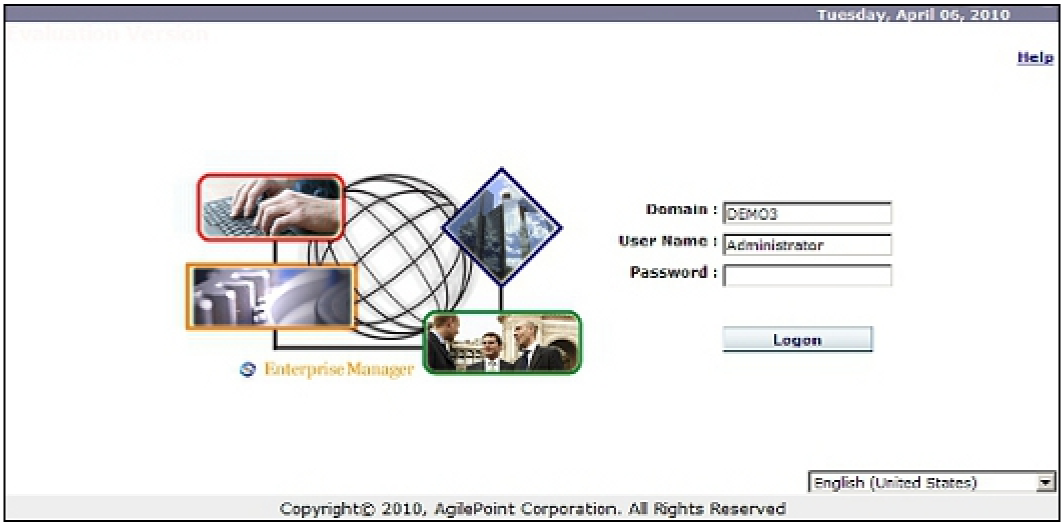


Localization for Enterprise Manager

AgilePoint Enterprise Manager provides localization support for English, Japanese, Chinese, Hebrew, Spanish, and French. Once the localization feature is activated, a drop-down list becomes visible on the Main Page to select the language for which to show. In order to expose this functionality, add the following 'add key' entry into the web.config file for Enterprise Manager.

```
<configuration>
  <appSettings>
    <add key="SupportedLocale" value="en-US;ja-JP;zh-CN;he;es;fr" />
      </appSettings>
</configuration>
```

After adding this configuration, the AgilePoint Enterprise Manager Main Page should look like the following:


Tuesday, April 06, 2010
Help
Domain :
DEMO3
User Name :
Administrator
Password :
Logon
Enterprise Manager
English (United States)
Copyright© 2010, AgilePoint Corporation. All Rights Reserved

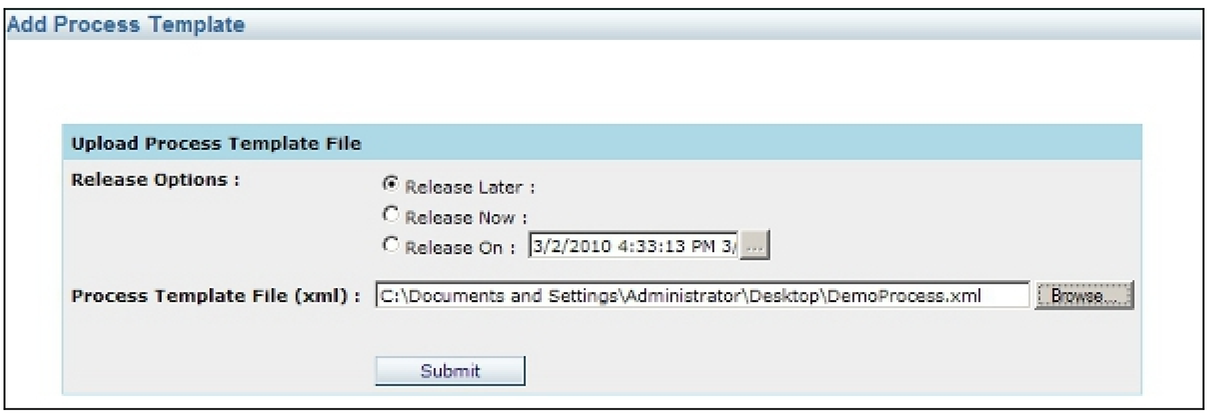
Process Template Management

The Process Template Management section of the Enterprise Manager Main Page allows the administrator to perform certain functions to process templates that have been deployed to AgilePoint Server such as adding a process template, deleting a process template, check out/in process templates, saving a process template as XML, and checking process templates for AgilePart/ AgileWork dependencies. The following items are functionalities available under the Process Templates Management section.

Add a Process Template

This function allows the administrator to upload XML-formatted AgilePoint process template files to AgilePoint Server.

1. On the Enterprise Manager Main Page, click the **Process Templates** link. The Process Templates page appears.
2. Click the **Add** button. The Add Process Template page appears.



3. Select the time you would like the process template to be released:
   - **Release Later** – Adds the process template to the repository, but does not release it.
   - **Release Now** – Releases the process template as soon as it's added.
   - **Release On** – Releases the process template at a time you specify.
4. Click **Browse**, and select the XML-formatted AgilePoint process template for which you would like to add.
5. Click **Submit**. The XML-formatted AgilePoint process template is added to Enterprise Manager.

Delete a Process Template

This function allows the administrator to delete a process template from AgilePoint Server.

1. On the Enterprise Manager Main Page, click the **Process Templates** link. The Process Templates page appears.
2. Click the option button next to the process template for which you would like to delete and click the **Delete** button.

Check Out and In a Process Template

This function allows the administrator to check in/out a process template for modification. This prevents more than one user from updating the same process template at the same time. When you want to revise the XML-formatted AgilePoint process template, first do **Check Out** from the Process Templates page in Enterprise Manger. You will now modify the original process template in Envision. When you have the new version of the template ready to upload (save again as XML in Envision), do **Check In** from the Process Templates page and check in the latest XML file that you generated. It will prompt you for the new version number. When you check-in a new version of a process model directly from AgilePoint Enterprise Manager, it will be loaded into AgilePoint Server with the status **Created**, but it will not be automatically **Released**. You can therefore deploy all of your process model changes to AgilePoint, and then "Release" all of the new versions once all of the changes are deployed.

Save as File

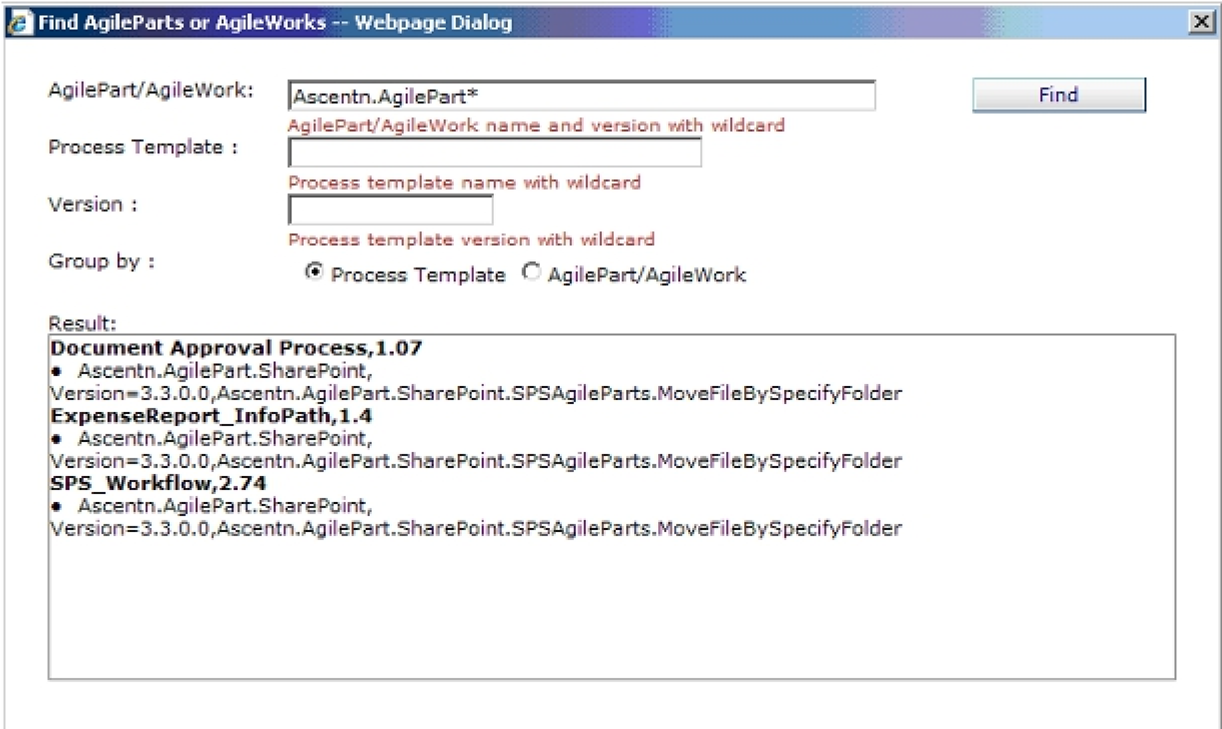
The Save as File function allows the administrator to save a process template as XML for further modifications. Once the process template XML is saved, it can be imported into AgilePoint Envision and saved as a .vsd file. This can be helpful if you have lost your master process template .vsd and want to recover it.

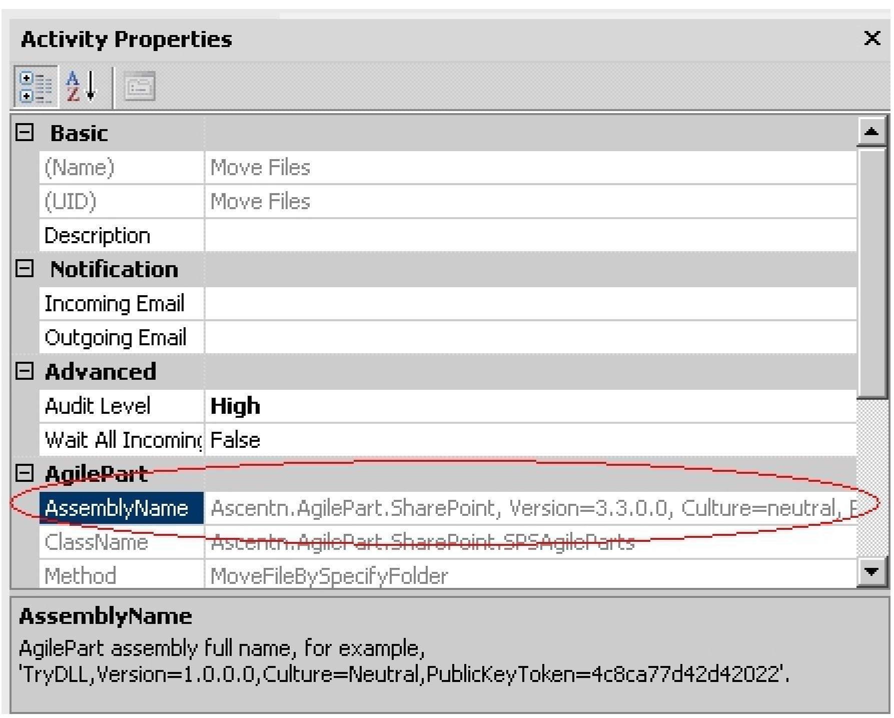
1. On the Enterprise Manager Main Page, click the **Process Templates** link. The Process Templates page appears.
2. On the Process Templates page, select the process template for which you would like to save as a XML file and click the **Save as File** button. The Save Process Template File page appears.
3. Click the **Download** link and save the .zip file to the desired directory.
4. The process template XML file can now be imported into Envision via **File** > **Export & Import** > **Import Process Template XML** and saved as a .vsd file.

Find AgilePart and AgileWork

The Find AgilePart and AgileWork function allows the administrator to search for AgileParts and AgileWorks in deployed process templates. This function can be used for analyzing the dependencies of a process template. For example, the administrator can see what AgileParts/AgileWorks (and the version) are associated with a process template.

1. On the Enterprise Manager Main Page, click the **Process Templates** link. The Process Templates page appears.
2. Click the **Find AgilePart & AgileWork** button. The Find AgileParts or AgileWorks page appears.





3. Enter the search criteria in the text boxes provided. For example, in the AgilePart/AgileWork text box, type the AgilePart/AgileWork assembly name and click **Find**. You can also search on process template name or process template version.

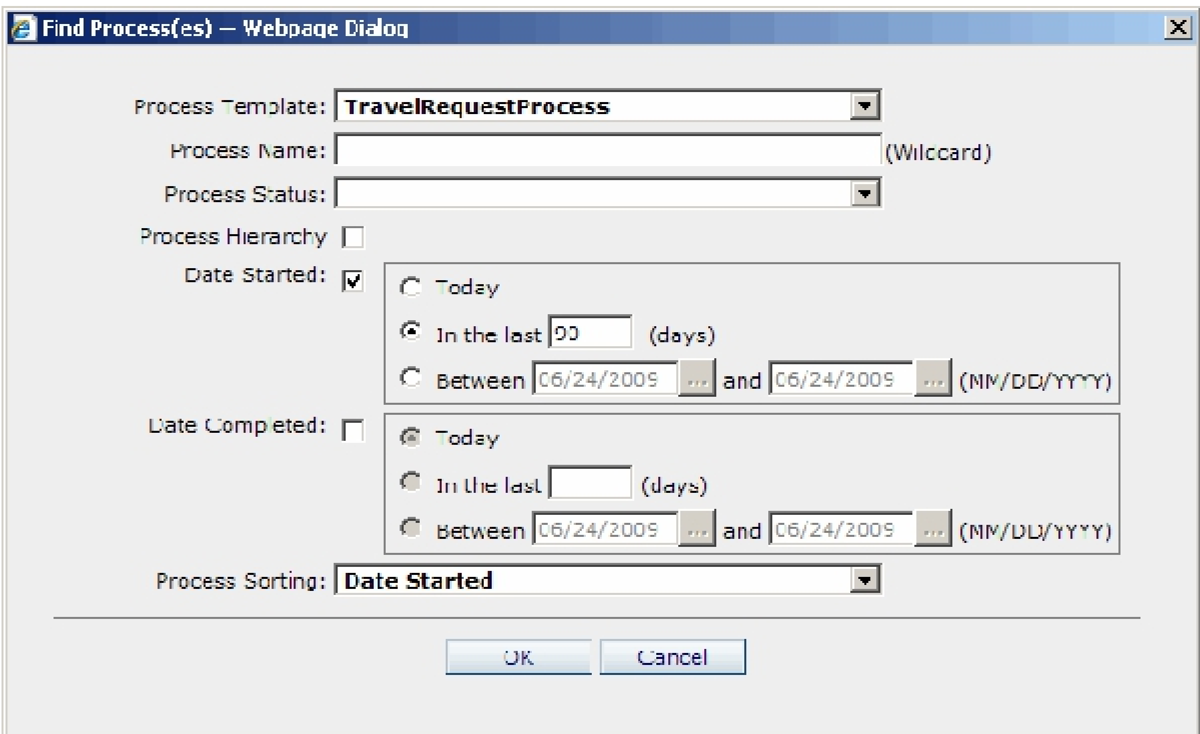
Runtime Management

The Runtime Management section of the Enterprise Manager Main Page allows the administrator to perform certain functions such as suspend/resume, rollback, cancel, and migrate process instances, and manage task and notifications. The following items are functionalities available under the Process Templates Management section.

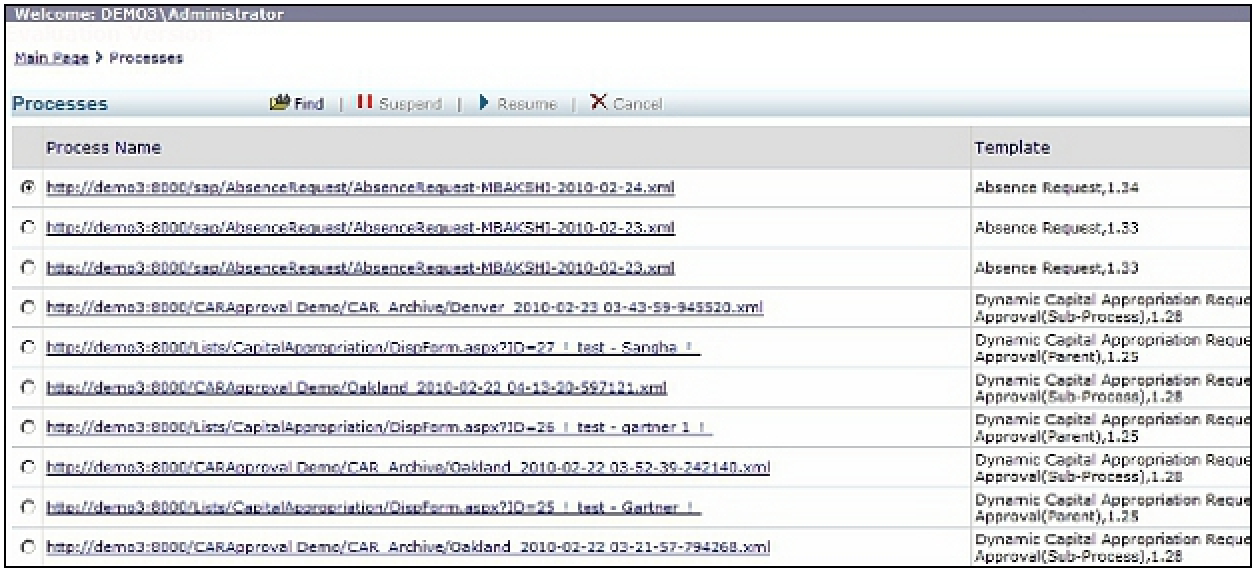
Find a Process Template

This function allows the administrator to find the desired process instance(s).

1. On the Enterprise Manager Main Page, click the **Processes** link. The Processes page appears.
2. Click the **Find** button. The Find Process(es) page appears.



3. Enter the search criteria and click **OK**. The process(es) that match the specified criteria are returned. The process instance link opens the Process page that can be used to drill down into the process to expose detailed information about the process instance.



Suspend a Process

To suspend a running process, do the following.

Prerequisites

- A running process instance.

Navigation

Find the process instance you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.

Instructions

1. In the search results on the **Find Process(es)** page, select your process instance.
2. On the Enterprise Manager Main Page, click the **Tasks** link. The **Tasks** page appears.
3. Click **Suspend**.

Resume a Suspended Process

To resume a suspended process, do the following.

Prerequisites

- A suspended process instance.

Navigation

Find the process instance you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.

Instructions

1. In the search results on the **Find Process(es)** page, select your process instance.
2. Click **Resume**.

Roll back within a Process Instance

To roll back a process instance to a specified activity, do the following.

Prerequisites

- A running process instance.

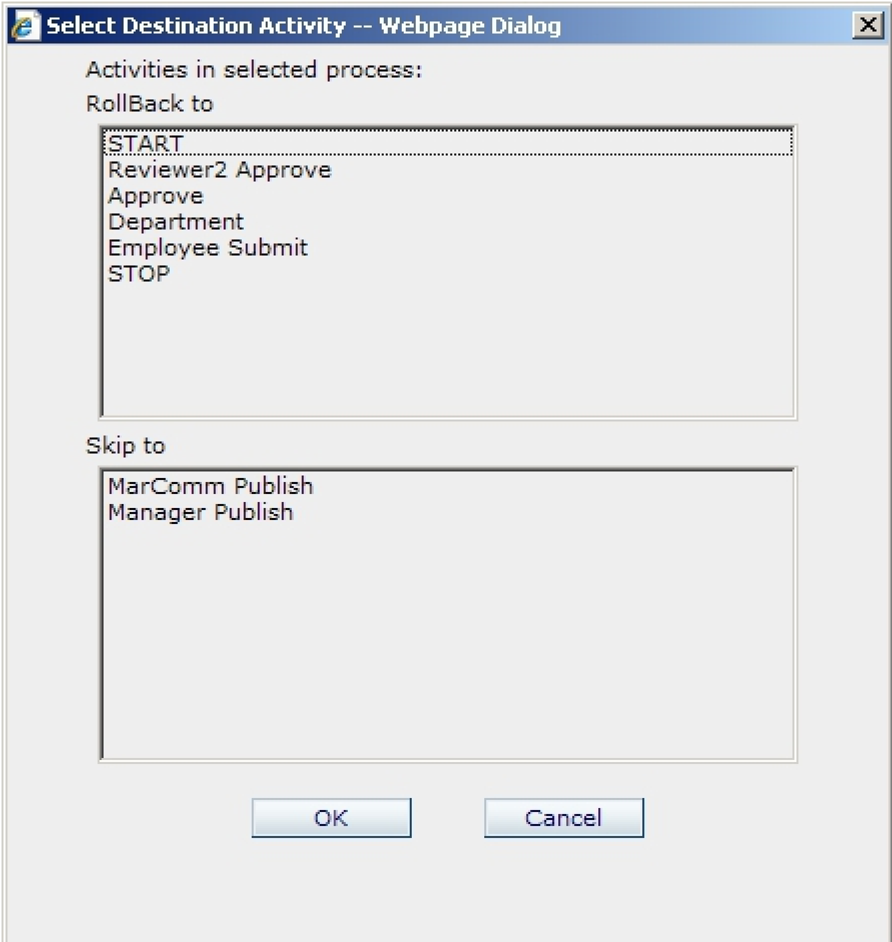
Navigation

Open the Process Detail page for the process you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.
4. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.

Instructions

1. On the process detail page, click **Rollback & Skip**. The **Select Destination Activity** page appears.



2. In the **Rollback to** box, select the activity to which you want to rollback, and click **OK**.

Skip within a Process Instance

To skip forward within a process instance to a specified activity, do the following.

Prerequisites

- A running process instance.

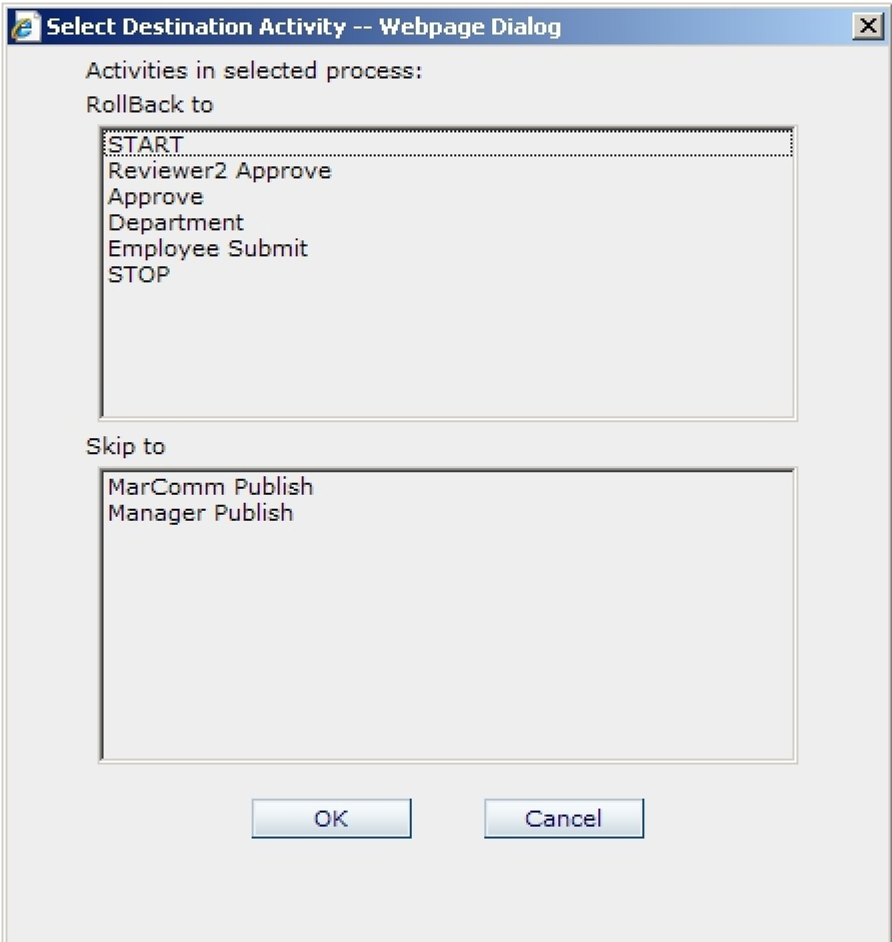
Navigation

Open the Process Detail page for the process you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.
4. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.

Instructions

1. On the process detail page, click **Rollback & Skip**. The **Select Destination Activity** page appears.



2. In the **Skip to** box, select the activity to which you want to skip, and click **OK**.

Bypass or Update a Delay

To update or bypass the delay on the Delay AgilePart during runtime, do the following. This can prevent a process from becoming stuck because circumstances change the requirements for a delay while a process instance is running. Examples include schedule changes due to project requirements or participants' availability.

Prerequisites

- A running process instance that is waiting to move forward based on a delay set by the Delay AgilePart.

Navigation

Open the Process Detail page for the process you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.
4. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.
5. Click the **Process Monitor** tab.

Instructions

1. On the **Process Monitor** tab, page, click the Delay AgilePart you want to update, and then click **Update Delay**.
2. On the Update Delay dialog box, do one of the following, and then click **OK**:
   - To simply bypass the delay and move the process forward, click **Bypass Delay**.
   - To update the date and time on which the delay should expire, click **Update Delay**, and then set the date and time you want.

Cancel a Process Instance

To cancel (manually stop) a process instance, do the following.

Note that it is also possible to cancel a process instance using the Process Instance List web part in SharePoint.

Prerequisites

- A process instance in any status other than Completed or Canceled.

Navigation

Find the process instance you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.

Instructions

1. In the search results on the **Find Process(es)** page, select your process instance.
2. Click **Cancel**.

   Once a process instance is canceled, all assigned tasks will be removed from the participants' task lists.

Migrate a Process Instance

You can migrate a suspended process instance from one process template version to another version at run time without losing any of the information collected prior to migration. You can migrate to a newer version or an older version of a process instance.

This feature enhances the exception handling capabilities by allowing you to select from a list the process instance for which you would like to migrate for handling the specific exception at hand.

Prerequisites

- A running process instance.

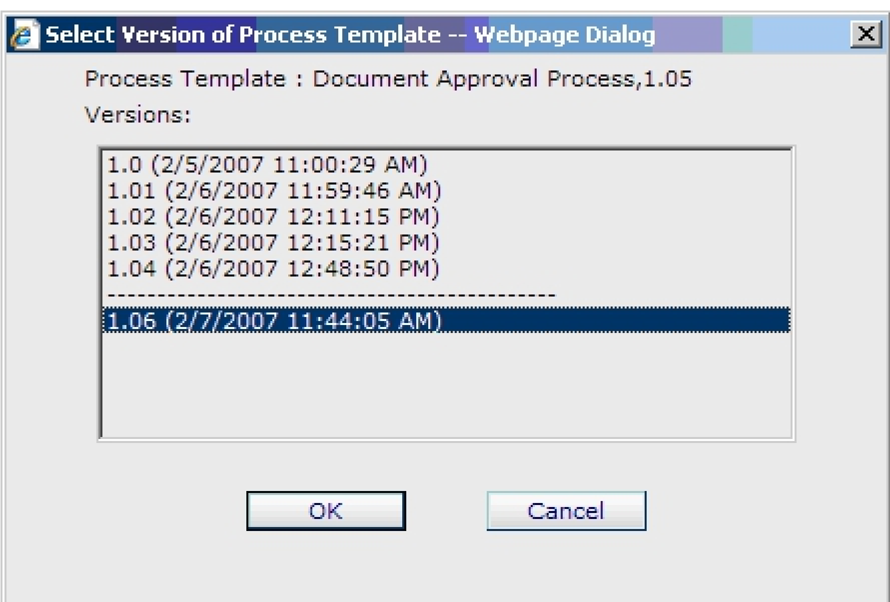
Navigation

Suspend your process:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.
4. In the search results on the **Find Process(es)** page, select your process instance.
5. Click **Suspend**.

Instructions

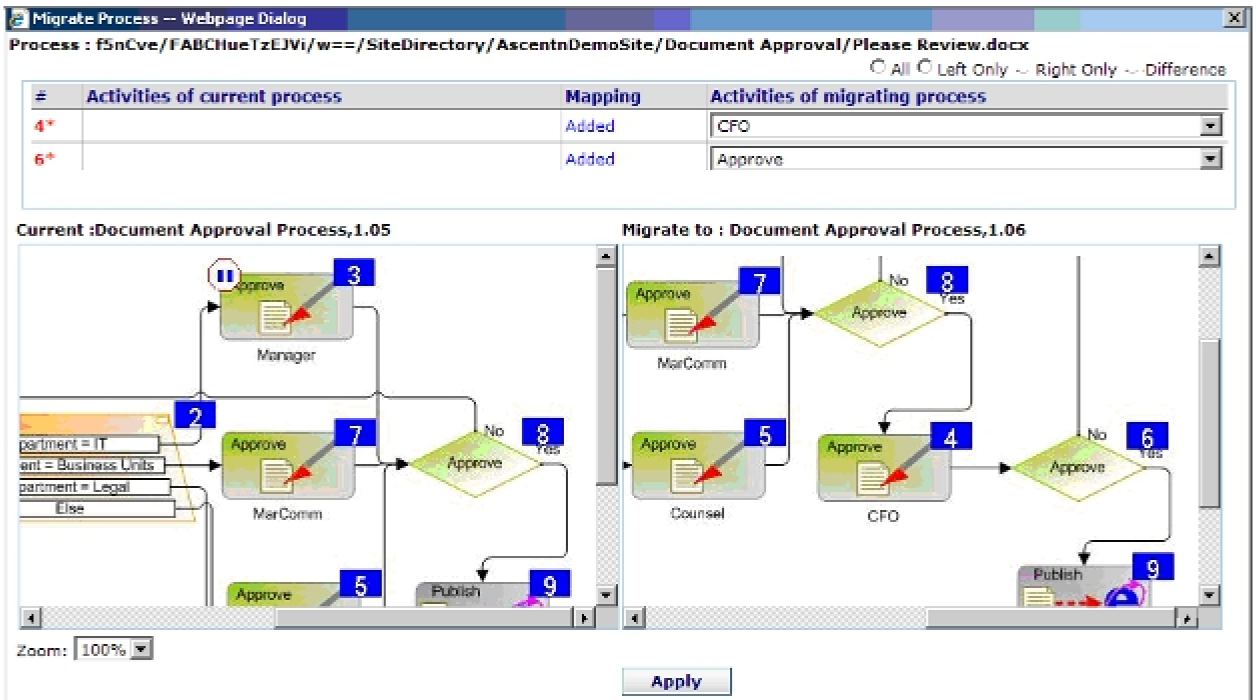
1. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.
2. Click **Migrate**. The **Select Version of Process Template** page appears.



3. Select the process instance for which you would like to migrate to and click **OK**.
4. Use the **Migrate Process** window to view information about the current process instance activities as well as the activities of the new process instance.

   The following options are available:

   - **All** - Shows all activities in both the source and destination process instances.
   - **Left Only** - Shows all activities in the source process instance.
   - **Right Only** - Shows all activities in both the destination process instance.
   - **Difference** - Shows the activities in destination process instance that are not included in the source process instance.



5. If you want to perform bulk migration to migrate multiple process instances using the same options, select **Save the migration instruction**.
6. Click **Apply**. The suspended process instance is migrated to the new process instance.
7. If you selected **Save the migration instruction**, the file **Instruction_[ID].xml** opens in a new browser window. Save this file to the following folder:

   ```
   [AgilePoint Server installation]\Tools\
   ```

   For more information, see Bulk Migration on the AgilePoint Support Portal.
8. Resume the process instance to bring it to a running state.

Bulk Migration

You can perform a bulk migration on multiple process instances once you have migrated an individual process instance.

Prerequisites

- A file named Instruction_[ID].xml that was generated by previously migrating a process instance. This file should reside in the following folder:

  ```
  [AgilePoint Server installation]\Tools\
  ```

- The process instances you want to migrate must match the original process instance exactly to be included in the bulk migration. For example, the target process instances must be at the same running state as the original process instance.

Navigation

Open the APADM Utility Tool:

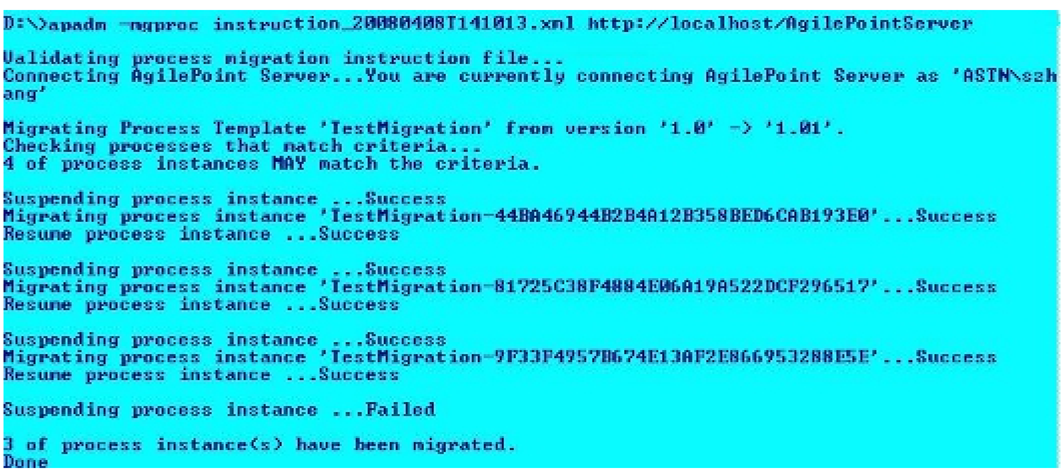
1. Open the following file:

   ```
   [AgilePoint Server installation]\Tools\apadm.exe
   ```

Instructions

1. Run the following APADM command line prompt:

   ```
   apadm –mgproc  [Process Migration Instruction XML File]
      [AgilePoint Server URL]
   ```



The command prompt window provides the status of each process instance migration.

Partial Rework

Partial rework is the capability to dynamically modify or "redo" a previously completed activity without interrupting the overall flow of the process instance.

When you create a partial rework, the task you want to rework is added to the current task as an additional Work to Perform.

This differs from a rollback, in that the entire process does not roll back to the previously completed activity. Only the identified activity is considered.

Prerequisites

- A running process instance with at least one manual activity in Completed status, and at least one manual activity in Active status.

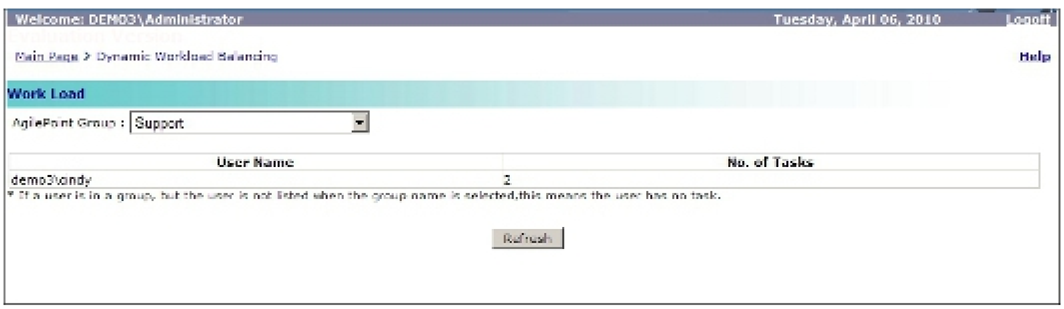
Instructions

1. On the Enterprise Manager Main Page, click **Partial Rework**.
2. On the **Partial Rework** page, in the **Process Template** list, select your process template.
3. In the **Running Process Instances** list, select your process instance.
4. In the **Active Manual Activity(s)** list, select the activity to which you want to add the reworked task.
5. In the **Tasks To Rework** list, select the tasks you want to rework.
6. Click **Apply**.

The tasks you selected in the **Tasks To Rework** list are added as Works to Perform to the activity you selected in the **Active Manual Activity(s)** list.

Workload Balance

Workload Balancing is a tool for viewing information associated with the Work Load Balance Agile Work, where it is shown, the number of global tasks assigned to a user in a particular group.



Pseudo Tasks

A pseudo task is an item that appears in the Task List of one user in order to monitor or manage the task of another user.

The most common use case for a pseudo task is a manager who wants to monitor the tasks of their subordinates. A pseudo task appears in the manager's task list, where he can view the subordinate's task status, and manage the task. The manager, however, cannot complete the task.

A pseudo task will not block the process from moving forward.

In the following example, the process model includes three activities.

- Submit
- Manager Approval

- CFO Approval

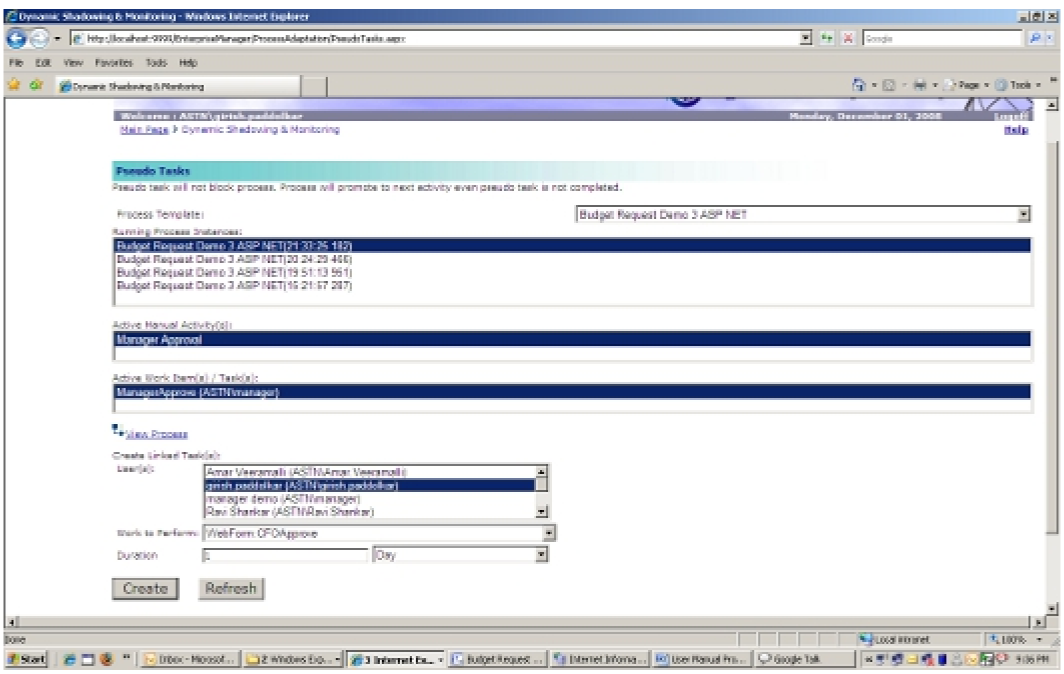
The CFO wants to monitor the Manager Approval tasks. A pseudo task at the CFO activity will be created to track the Manager Approval.

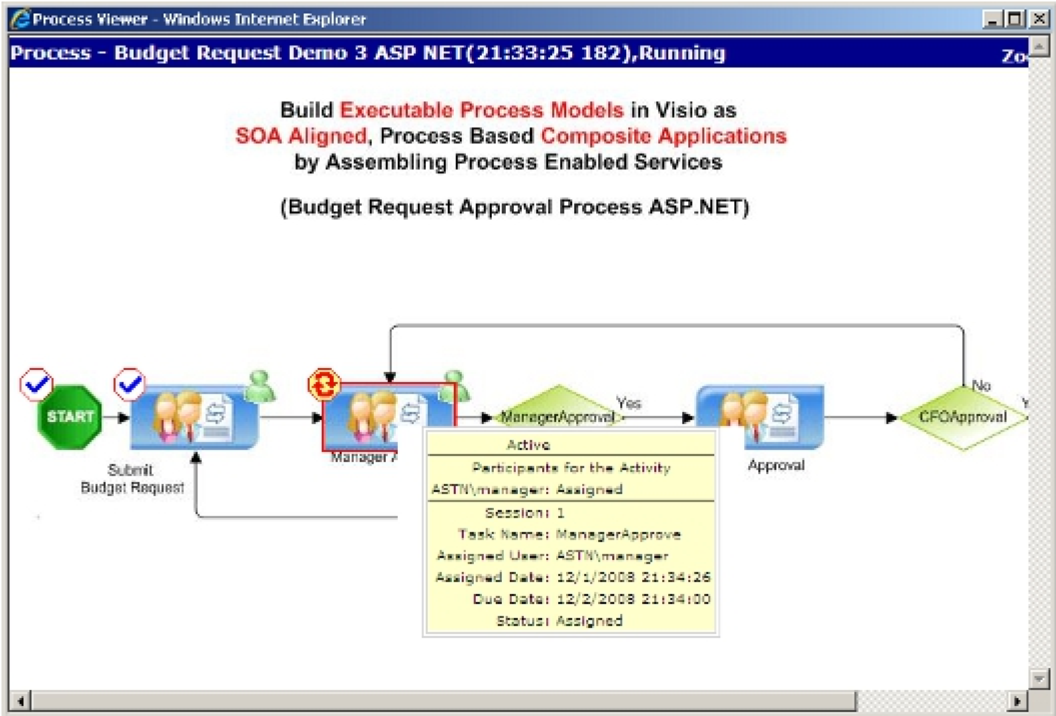
To add a pseudo task:

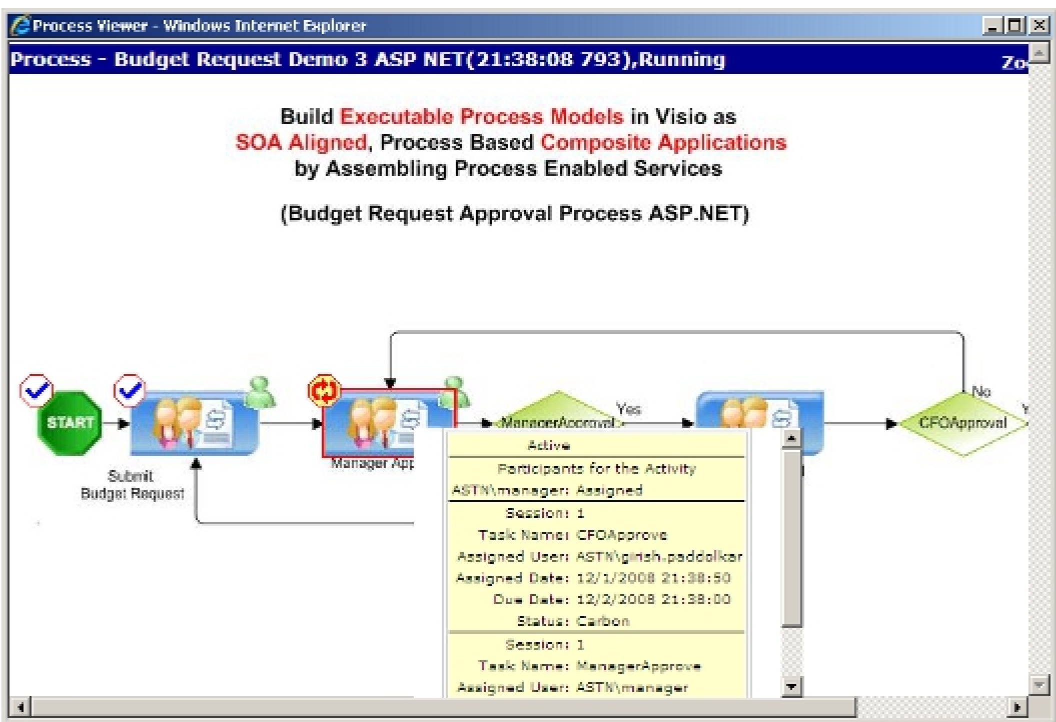
1. Initiate a Process and complete the Submit activity.
2. Logon to Enterprise Manager.
3. Click on **Shadowing and Monitoring** link in the **Process Adaptation** section.
4. Select the **Budget Request Process**.
5. Select the **CFO Approval** from the Work To Perform drop-down list and select the user.
6. Click **Create**.
7. You can see a task has been created with status **carbon**.

This task will be completed in two cases:

- If the user completes their own task.
- If the task gets canceled, if all the tasks are completed.




Process Viewer - Windows Internet Explorer
Process - Budget Request Demo 3 ASP NET(21:33:25 182),Running
Build Executable Process Models in Visio as
SOA Aligned, Process Based Composite Applications
by Assembling Process Enabled Services
(Budget Request Approval Process ASP.NET)
START
Submit Budget Request
ManagerApproval
Yes
No
Approval
CFOApproval
Active
Participants for the Activity
ASTN\manager: Assigned
Session: 1
Task Name: ManagerApprove
Assigned User: ASTN\manager
Assigned Date: 12/1/2008 21:34:26
Due Date: 12/2/2008 21:34:00
Status: Assigned


Process Viewer - Windows Internet Explorer
Process - Budget Request Demo 3 ASP NET(21:38:08 793),Running
Build Executable Process Models in Visio as
SOA Aligned, Process Based Composite Applications
by Assembling Process Enabled Services
(Budget Request Approval Process ASP.NET)
START
Submit Budget Request
Yes
No
CFOApproval
Active
Participants for the Activity
ASTN\manager: Assigned
Session: 1
Task Name: CFOApprove
Assigned User: ASTN\girish.paddolkar
Assigned Date: 12/1/2008 21:38:50
Due Date: 12/2/2008 21:38:00
Status: Carbon
Session: 1
Task Name: ManagerApprove
Assigned User: ASTN\manager

View Activities

The Activities tab allows the administrator to review detailed information about the activities associated with the process.

The following information about each activity is available:

- Name of the activity
- Session for which this activity was completed
- Status of the activity (e.g. Active, Passed, Canceled)
- Start date for the activity
- Completion date for the activity

Activities | Tasks | Event Log | Process Monitor | Data

Name	Session	Status	Start Date	Completion Date
START	1	Passed	5/9/2007 11:45:16	5/9/2007 11:45:16
Submit Resume	1	Passed	5/9/2007 11:45:16	5/9/2007 11:45:16
Pre-Screening Assigned to: PreScreener Group	1	Passed	5/9/2007 11:45:16	5/9/2007 11:45:57
Approve	1	Passed	5/9/2007 11:45:57	5/9/2007 11:45:57
SchoolRegion	1	Passed	5/9/2007 11:45:57	5/9/2007 11:45:57
New England School Validation Assigned to: NE_Validator	1	Passed	5/9/2007 11:45:57	5/9/2007 11:46:18
Validate Employment Records (Escalate if no response After 1 h	1	Passed	5/9/2007 11:46:18	5/9/2007 11:46:38
Approve	1	Passed	5/9/2007 11:46:18	5/9/2007 11:46:18
New York/New Jersey School Validation Assigned to: NY_Validator	0			
South East School Validation Assigned to: SE_Validator	0			
Northern California School Validation Assigned to: NC_Validator	0			
Manager Review	1	Cancelled	5/9/2007 11:46:38	
Approve	0			
STOP	0			

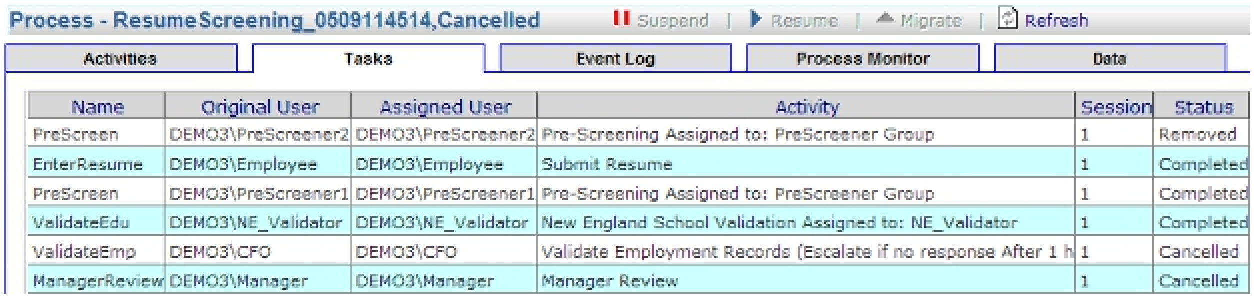
View Tasks

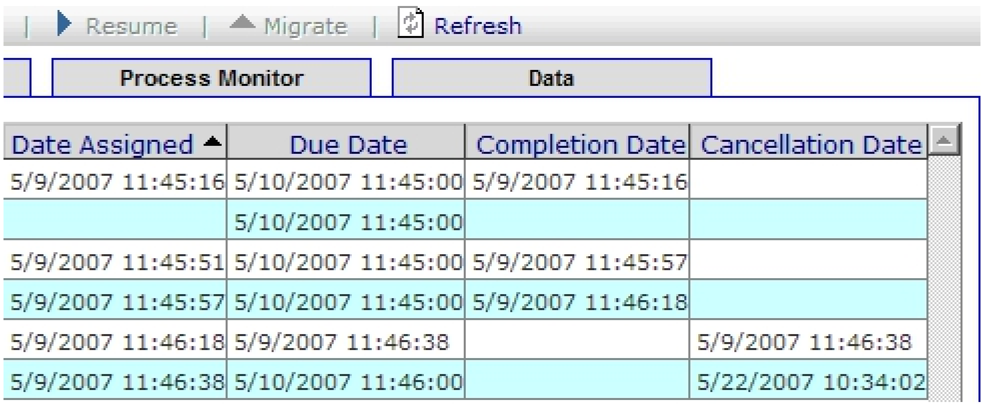
The Tasks tab allows the administrator to review detailed information about the manual activities associated with the process.

The following information about each manual activity is available:

- Name of the manual activity
- Original user
- Assigned user
- Description of the activity
- Session for which this activity was completed
- Status of the activity (e.g. Removed, Completed, Canceled)
- Date the activity was assigned
- Due date for the activity
- Completion date of the activity

- Cancellation date of the activity





View the Event Log

The Event Log allows the administrator to review particular events that occurred during the execution of the process instance.

The event log displays the following information:

- Name of the event
- Process participant associated with the event
- Status of the event
- Date the event was triggered
- Date the event completed

Prerequisites

- At least one process instance in any status.

Navigation

Open the Process Detail page for the process you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.

4. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.

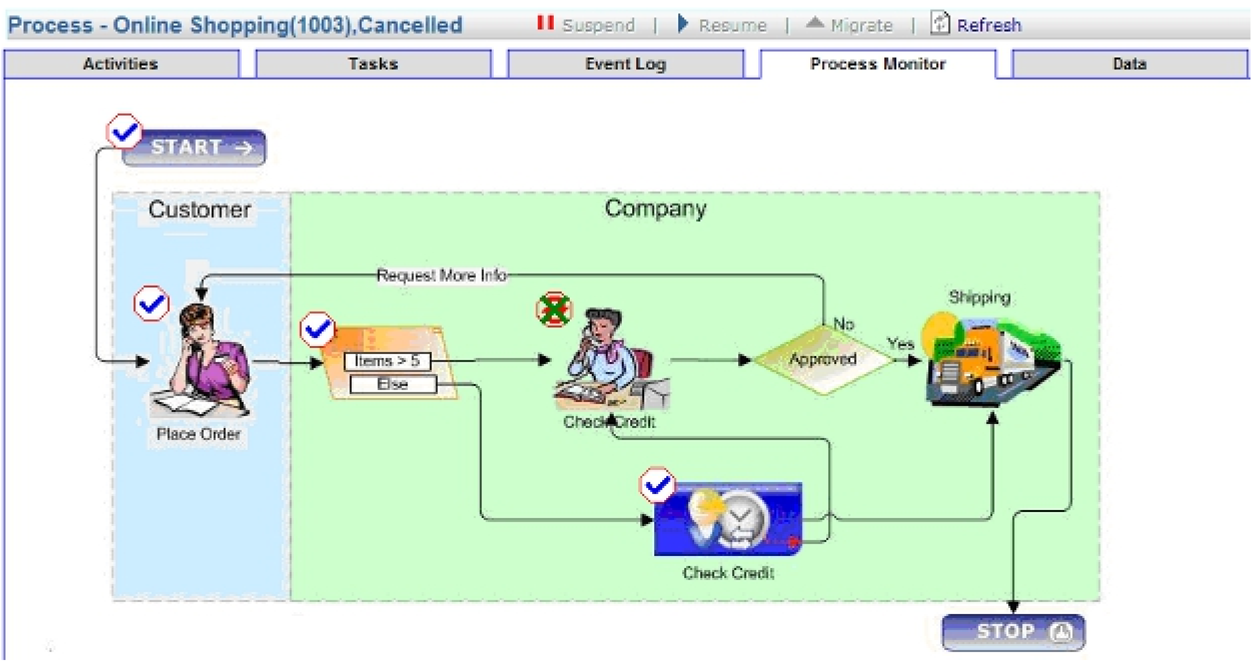
Instructions

1. On the process detail page, click the **Event Log** tab.

View the Process Monitor

The Process Monitor tab allows the administrator to view a process instance in real-time status within the process viewer.

Note that the process viewer can also be accessed by process participants through the SharePoint and ASP.NET Task List web parts.



Prerequisites

- At least one process instance in any status.

Navigation

Open the Process Detail page for the process you want to manage:

1. On the Enterprise Manager Main Page, click the **Processes** link. The **Processes** page appears.
2. Click **Find**. The **Find Process(es)** page appears.
3. Enter the search criteria for your process, and click **OK**. The processes that match the specified criteria are displayed.
4. In the search results on the **Find Process(es)** page, click the process name. The process detail page appears.

Instructions

1. On the process detail page, click the **Process Monitor** tab.

View Data

The Data tab allows the administrator to review the custom process attributes and values that have been used in the process instance.

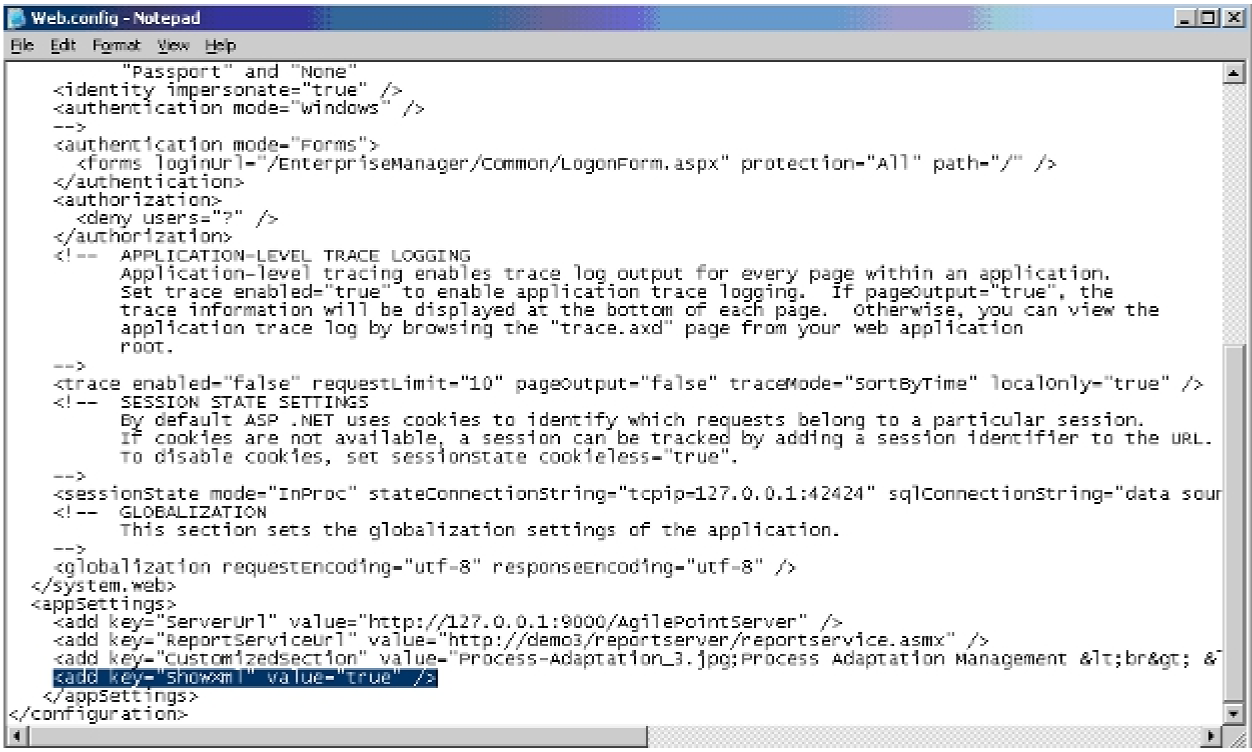
The following information is available:

- Name of the custom attribute
- Date type of the custom attribute
- Value associated with the custom attribute

View InfoPath XML Data

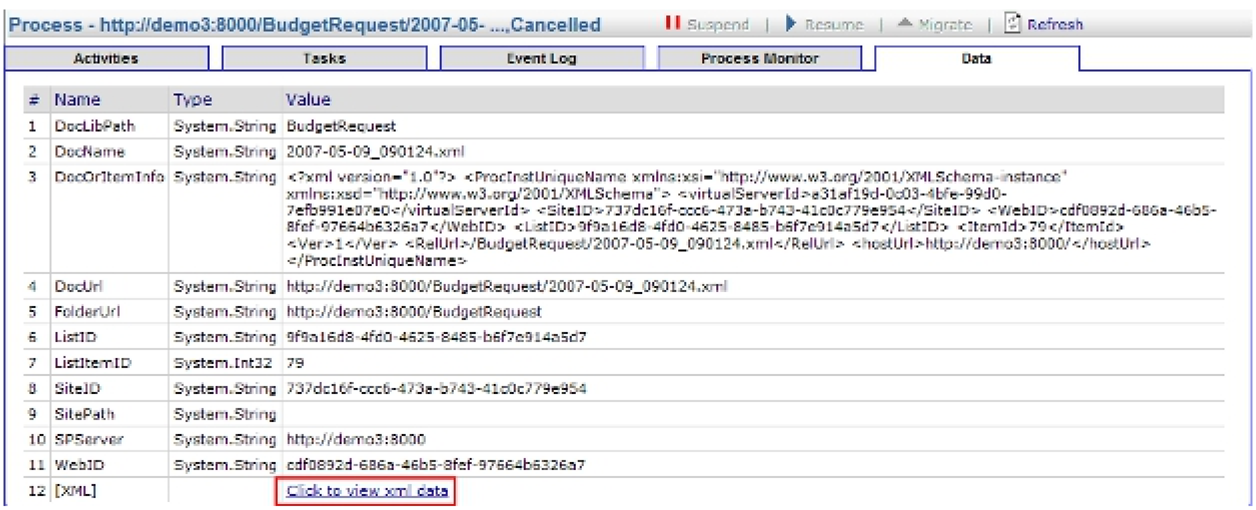
For MS InfoPath based processes, you can view additional XML data from the InfoPath form. In order to access this information, you must add a line to the Enterprise Manager **web.config** file (C:\AgilePoint\EnterpriseManager) as shown below.

```
<add key="ShowXml" value="true" />
```



```
Web.config - Notepad
File  Edit  Format  View  Help
          "Passport" and "None"
    <identity impersonate="true" />
    <authentication mode="Windows" />
    -->
    <authentication mode="Forms">
      <forms loginUrl="/EnterpriseManager/Common/LogonForm.aspx" protection="All" path="/" />
    </authentication>
    <authorization>
      <deny users="?" />
    </authorization>
    <!--  APPLICATION-LEVEL TRACE LOGGING
          Application-level tracing enables trace log output for every page within an application.
          Set trace enabled="true" to enable application trace logging.  If pageOutput="true", the
          trace information will be displayed at the bottom of each page.  Otherwise, you can view the
          application trace log by browsing the "trace.axd" page from your web application
          root.
    -->
    <trace enabled="false" requestLimit="10" pageOutput="false" traceMode="SortByTime" localOnly="true" />
    <!--  SESSION STATE SETTINGS
          By default ASP .NET uses cookies to identify which requests belong to a particular session.
          If cookies are not available, a session can be tracked by adding a session identifier to the URL.
          To disable cookies, set sessionState cookieless="true".
    -->
    <sessionState mode="InProc" stateConnectionString="tcpip=127.0.0.1:42424" sqlConnectionString="data sour
    <!--  GLOBALIZATION
          This section sets the globalization settings of the application.
    -->
    <globalization requestEncoding="utf-8" responseEncoding="utf-8" />
  </system.web>
  <appSettings>
    <add key="ServerUrl" value="http://127.0.0.1:9000/AgilePointServer" />
    <add key="ReportServiceUrl" value="http://demo3/reportserver/reportservice.asmx" />
    <add key="CustomizedSection" value="Process-Adaptation_3.jpg;Process Adaptation Management &lt;br&gt; &
    <add key="ShowXml" value="true" />
   </appSettings>
</configuration>
```

After adding this line, you will now see the **Click to view XML data** link.

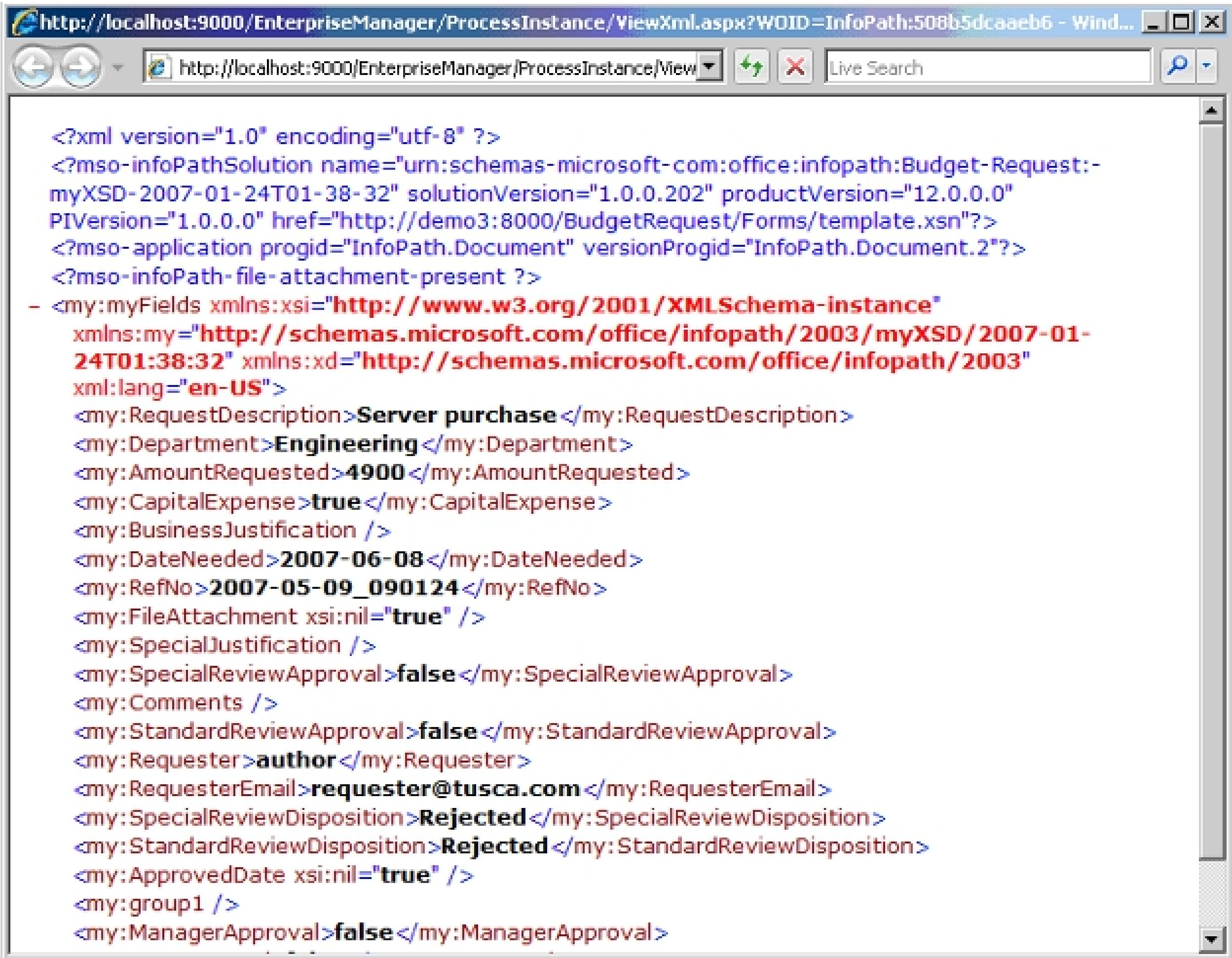


Process - http://demo3:8000/BudgetRequest/2007-05- ...,Cancelled | Suspend | Resume | Migrate | Refresh

Activities | Tasks | Event Log | Process Monitor | Data

#	Name	Type	Value
1	DocLibPath	System.String	BudgetRequest
2	DocName	System.String	2007-05-09_090124.xml
3	DocOrItemInfo	System.String	<?xml version="1.0"?> <ProcInstUniqueName xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema"> <virtualServerId>a31af19d-0c03-4bfe-99d0-7efb991e07e0</virtualServerId> <SiteID>737dc16f-ccc6-473a-b743-41c0c779e954</SiteID> <WebID>cdf0892d-686a-46b5-8fef-97664b6326a7</WebID> <ListID>9f9a16d8-4fd0-4625-8485-b6f7e914a5d7</ListID> <ItemId>79</ItemId> <Ver>1</Ver> <RelUrl>/BudgetRequest/2007-05-09_090124.xml</RelUrl> <hostUrl>http://demo3:8000/</hostUrl> </ProcInstUniqueName>
4	DocUrl	System.String	http://demo3:8000/BudgetRequest/2007-05-09_090124.xml
5	FolderUrl	System.String	http://demo3:8000/BudgetRequest
6	ListID	System.String	9f9a16d8-4fd0-4625-8485-b6f7e914a5d7
7	ListItemID	System.Int32	79
8	SiteID	System.String	737dc16f-ccc6-473a-b743-41c0c779e954
9	SitePath	System.String	
10	SPServer	System.String	http://demo3:8000
11	WebID	System.String	cdf0892d-686a-46b5-8fef-97664b6326a7
12	[XML]		Click to view xml data

Click the **Click to view xml data** link. The XML of the MS InfoPath form is displayed in a browser window.



Find Tasks

To find tasks current or past tasks in the AgilePoint system, do the following.

Prerequisites

- At least one process instance in any status.

Instructions

1. On the Enterprise Manager Main Page, click the **Tasks** link. The **Tasks** page appears.
2. Click the **Find** button. The **Find Tasks** page appears.
3. Enter the search criteria and click **OK**. The tasks that match the specified criteria are returned along with information such as the **Work to Perform** and **Status**.

Mark a Task as Complete

To manually mark a task as complete, do the following.

Prerequisites

- A running process instance.

Navigation

Find a task:

1. On the Enterprise Manager Main Page, click the **Tasks** link. The **Tasks** page appears.
2. Click the **Find** button. The **Find Tasks** page appears.
3. Enter the search criteria and click **OK**. The tasks that match the specified criteria are returned along with information such as the **Work to Perform** and **Status**.

Instructions

1. On the **Find Tasks** page, select your task.
2. Click **Mark Completed**.

Reassign a Task

To reassign a task to a different participant, do the following.

Prerequisites

- A running process instance.

Navigation

Find a task:

1. On the Enterprise Manager Main Page, click the **Tasks** link. The **Tasks** page appears.
2. Click the **Find** button. The **Find Tasks** page appears.
3. Enter the search criteria and click **OK**. The tasks that match the specified criteria are returned along with information such as the **Work to Perform** and **Status**.

Instructions

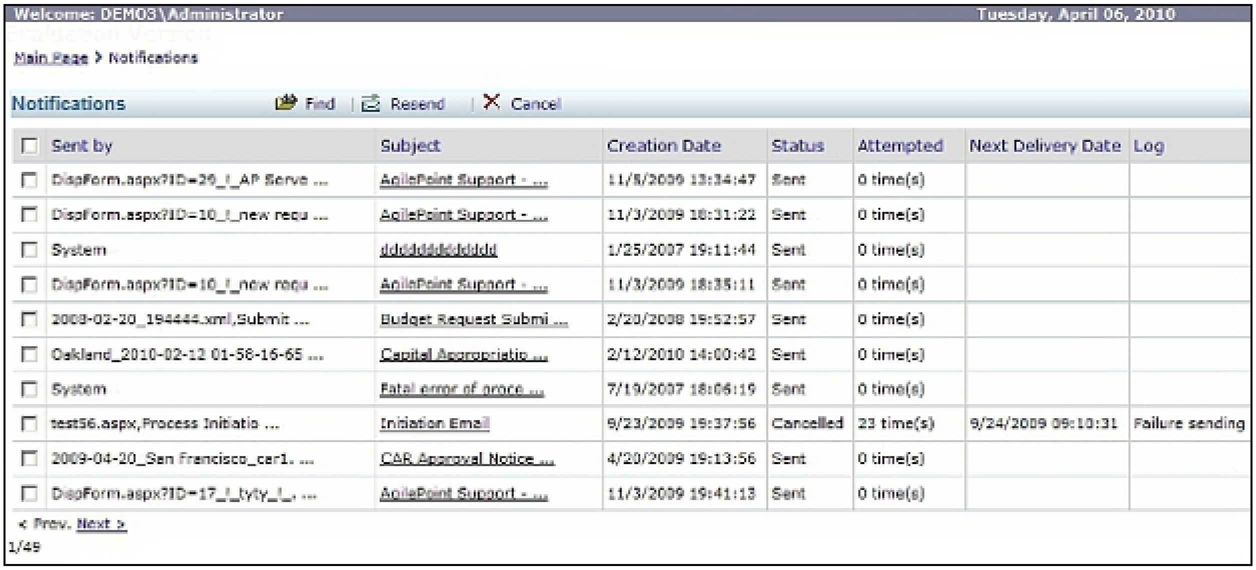
1. On the **Find Tasks** page, select your task.
2. Click **Reassign**.
3. Browse to select the new participant.
4. Click **Submit**.

Manage Notifications

This function allows the administrator to review, search for, and update (e.g. cancel or resend) the individual email notifications managed by AgilePoint Server.

To manage notifications:

1. On the Enterprise Manager Main Page, click the **Notifications** link. The Notifications page appears.
2. Click the **Find** button. The Find Notifications page appears.
3. Enter the search criteria and click **OK**. The notifications that match the specified criteria are returned along with information about the notifications associated with the process instance such as "Sent by" and "Status".



To resend a notification:

1. Click the check box next to the notification for which you would like to resend.
2. Click **Resend**.

To cancel a notification:

1. Click the check box next to the notification for which you would like to cancel.
2. Click **Cancel**.

Event Service Page

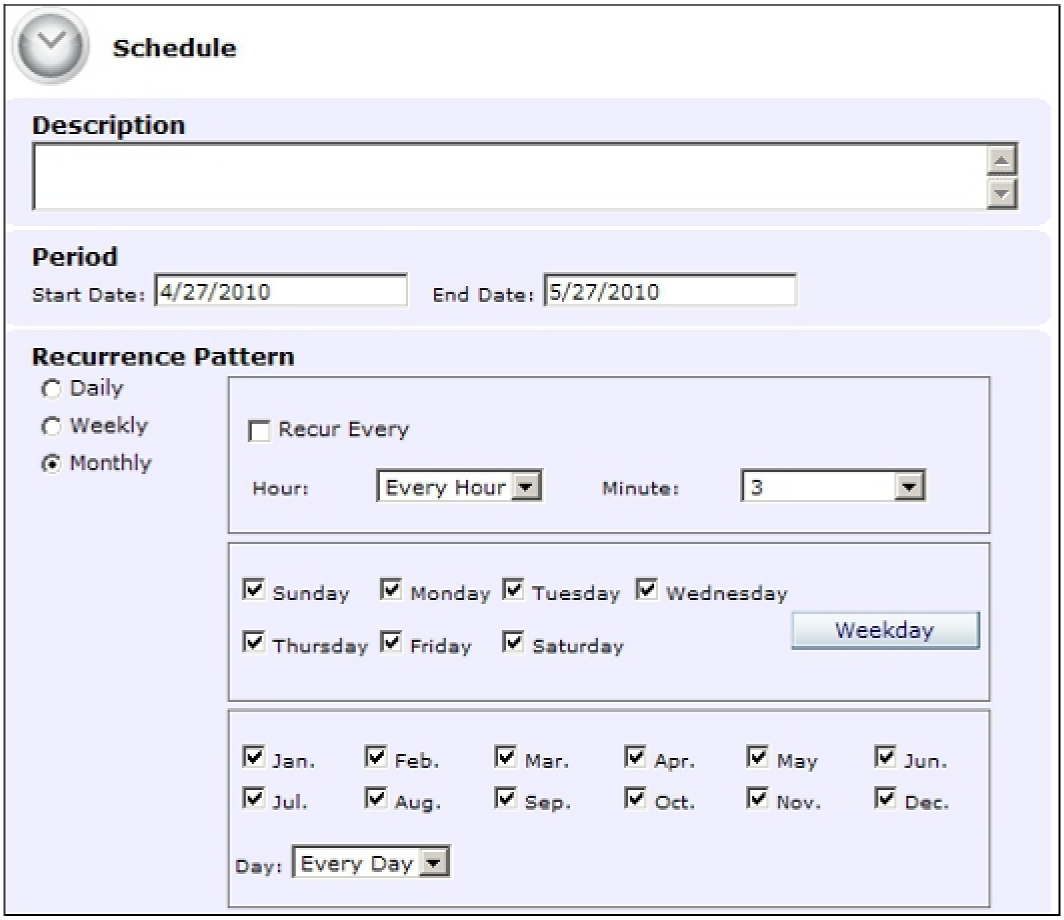
This page allows the administrator to initiate processes automatically via scheduling, email, database, or file dropping. All event listeners can be configured via AgilePoint Enterprise Manager.

Trigger a Process Based on a Schedule

The trigger a process based on a schedule allows you to automatically trigger an AgilePoint process based on a defined schedule (can be one time or recurring).

To trigger an AgilePoint process based on a schedule:

1. From the **Schedule** section, click the **Add** button. The **Schedule Event Setting** page appears.



2. Enter a description for the trigger.
3. Select a period for the trigger.
4. Configure the Recurrence Pattern.

   The Hour option indicates an hour of the day on a 24-hour clock, and the Minute option indicates a minute during that hour. Select Every Hour to indicate an event that occurs at a particular minute of every hour (for example, 8:30, 9:30, 10:30, and so on). Select Every Minute to indicate an event that occurs once per minute during a specified hour.

   If you want to configure an event to recur at a specified number of hours or minutes, select Recur Every, and then set the number of hours or minutes.
5. Select the Process Template to be triggered.
6. Check the **Enable this schedule** check box to activate the trigger.
7. Click **OK**. Notice that the trigger is now added to the list.

8. Click the **Edit** button or **Delete** button to edit or delete the trigger.

Trigger a Process Based on an Incoming Email

The trigger a process based on an incoming email allows you to automatically trigger an AgilePoint process based on an incoming email.

To trigger an AgilePoint process based on an incoming email:

1. From the **Incoming Email** section, click the **Add** button. The **Inbound Email Event Configuration** page appears.
2. Complete the fields as described in the following table:

Field Name	Definition
Description	A free text description of the email trigger.
Domain	Your email authentication domain.
User Name	The user name for your email server.
Password	The password for your email server.
Email Subject	A custom attribute that contains to the subject of your email. When the email account specified receives an email, the data associated with this attribute is stored. It can then be referenced in the process using the specified custom attribute.
Sender	A custom attribute that contains to the sender of your email. When the email account specified receives an email, the data associated with this attribute is stored. It can then be referenced in the process using the specified custom attribute.
Mail Body	A custom attribute that contains to the body of your email. When the email account

Field Name	Definition
	specified receives an email, the data associated with this attribute is stored. It can then be referenced in the process using the specified custom attribute.
Mail Server	Your email server type.
Exchange Server Name	The URL for your email server.
Process Template	The process template for which you want the email trigger to create a process instance.
Enable this schedule	When selected, indicates that the email trigger is active.

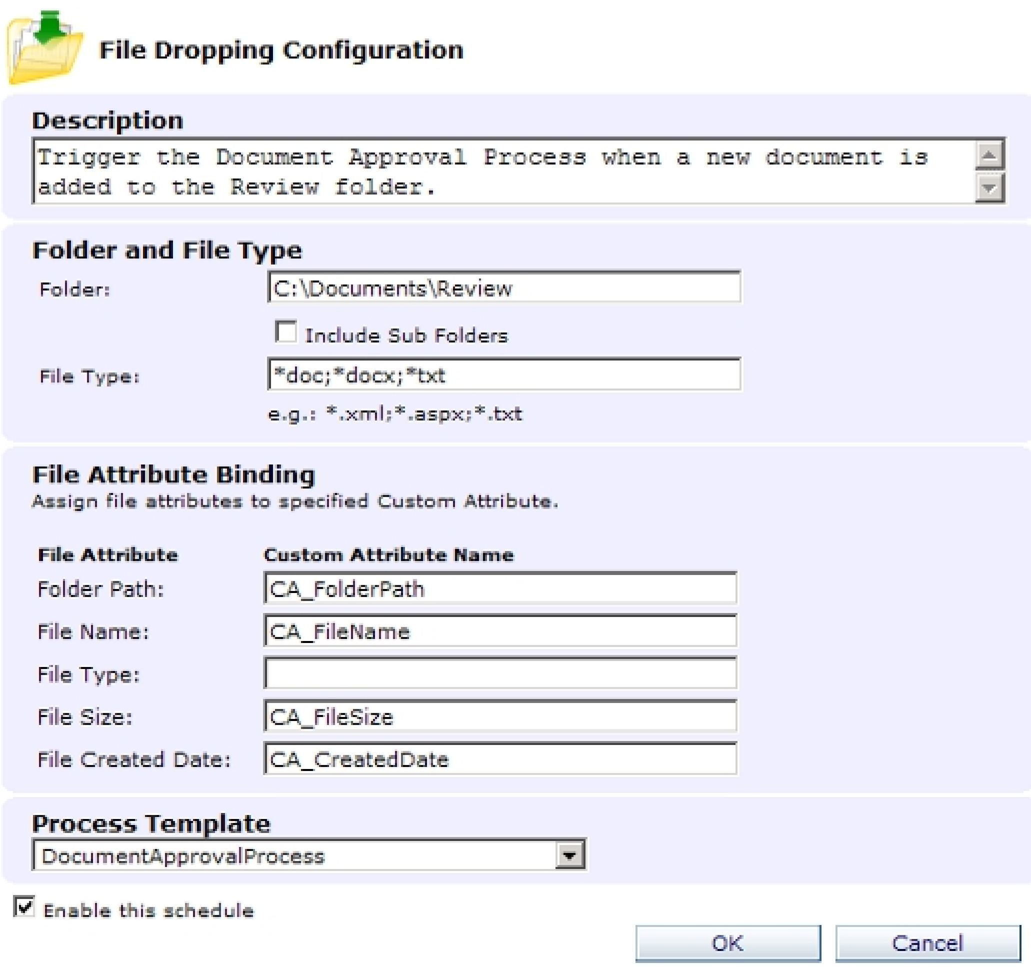
3. When you have finished, click **OK**.

Trigger a Process Based on a File Drop

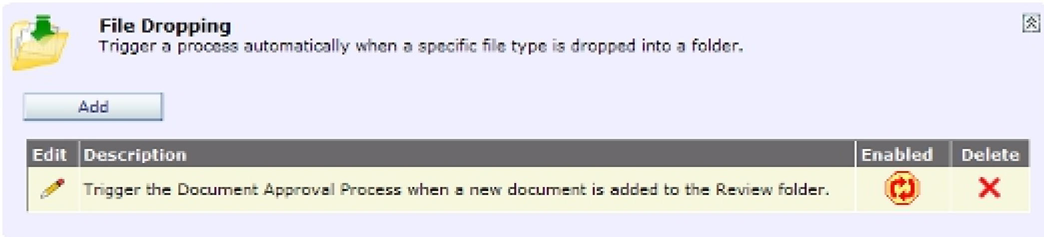
The trigger a process based on a file drop allows you to automatically trigger an AgilePoint process based on when a file is copied to a location and also is based on the type of file that is added.

To trigger an AgilePoint process based on a file drop:

1. From the **File Dropping** section, click the **Add** button. The File Dropping Event Configuration page appears.



2. Enter a description for the trigger.
3. Enter the folder name and file type. File type accepts multiple values separated by a semicolon.
4. (Optional) Use the **File Attribute Binding** section to specify Custom Attributes (for the Folder Path, File Name, File Type, File Size, and File Created Date) to be set when the process is initiated. When a file is dropped to the specified location, and the process is triggered, the data associated with the Folder Path, File Name, File Type, File Size, and File Created Date will be stored and can be referred to in the process as the Custom Attribute that you defined.
5. Select the Process Template to be triggered.
6. Check the **Enable this schedule** check box to activate the trigger.
7. Click **OK**. Notice that the trigger is now added to the list.



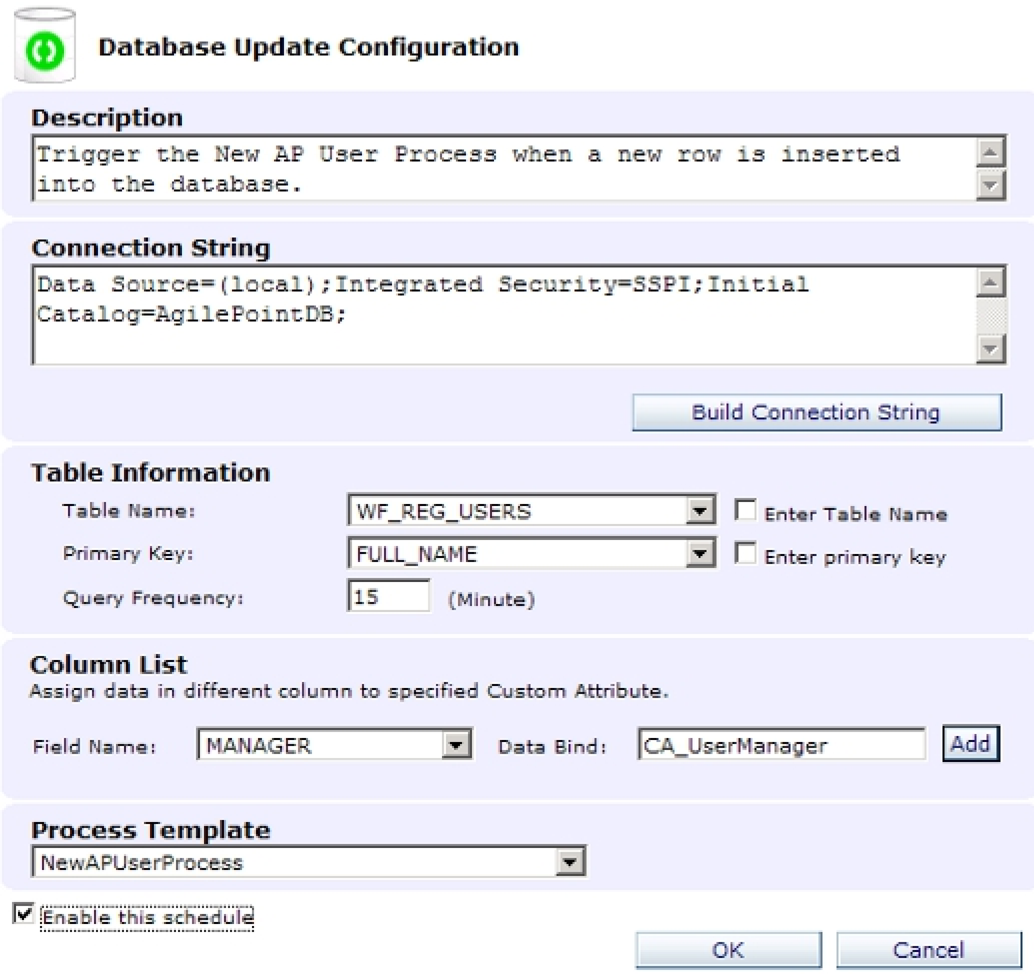
8. Click the **Edit** button or **Delete** button to edit or delete the trigger.

Trigger a Process Based on a Database Update

The trigger a process based on a database update allows you to automatically trigger an AgilePoint process based on when a new table row is added to a database.

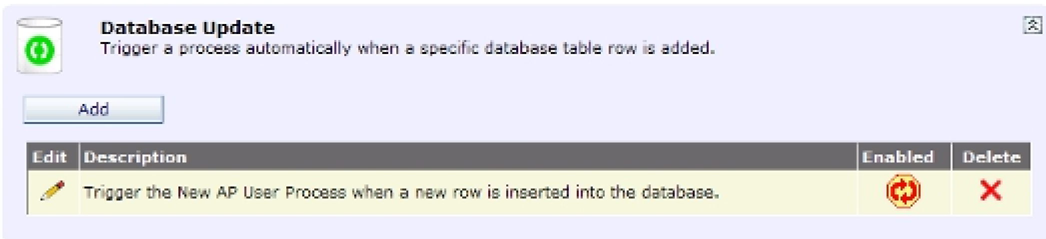
To trigger an AgilePoint process based on a file drop:

1. From the **Database Update** section, click the **Add** button. The **Database Update Event Setting** page appears.



2. Enter a description for the trigger.
3. Enter the database connection string manually or click the Build Connection String button for assistance in building the connection string. In the Connection String Builder page, enter the data source and user authentication fields and click the Retrieve Database button to retrieve the database name, if you know the database name, you can also check the **Enter Database Name** check box and type the database name directly into the text box. When finished, click OK, the connection string is built for you.
4. After the connection string is generated, specify which table you want to monitor and what is primary key for that table. It is important to ensure that the Primary key is defined properly. Once the event listener successfully initiates a process by retrieving the data from the table specified, it will delete the records. As mentioned above, as a best practice it is recommended to use a separate database table that is used for the Database Update monitoring, this is because once the process is triggered, the new database table row and records will also be deleted.
5. (Optional) Use the **Column List** section to specify Custom Attributes for the columns. One Custom Attribute can only bind to one column, but one column can be assigned to different Custom Attributes.

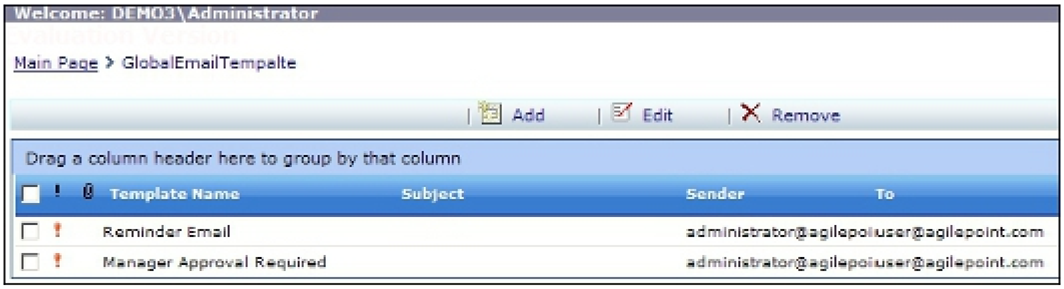
6. Select the Process Template to be triggered.
7. Check the **Enable this schedule** check box to activate the trigger.
8. Click **OK**. Notice that the trigger is now added to the list.



9. Click the **Edit** button or Delete button to edit or delete the trigger.

Global E-mail Templates Page

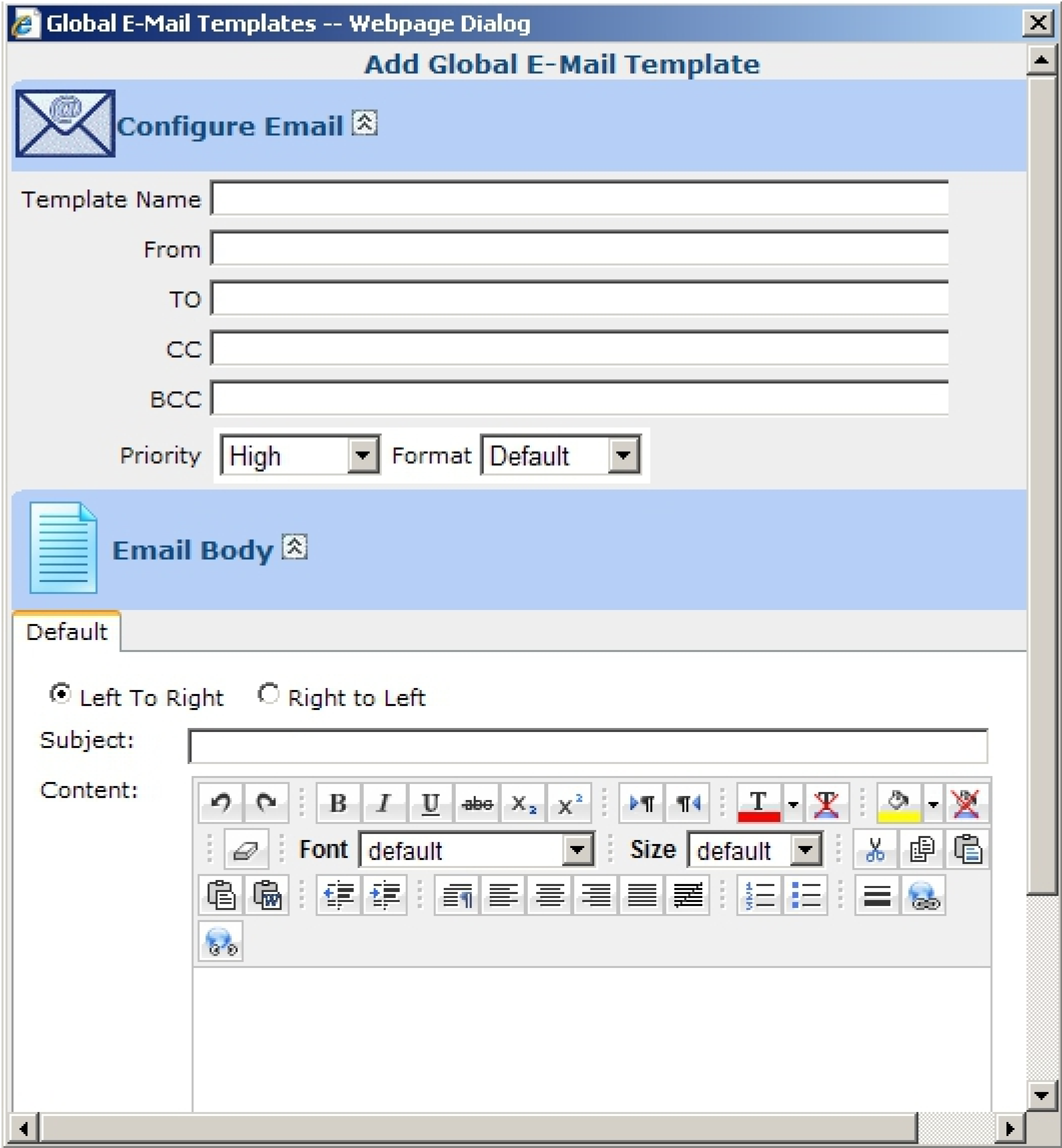
This page allows the administrator to add, update, and delete e-mail templates that AgilePoint Envision users can apply to create emails. You can use email templates to apply default values to an email, such as To, From, CC, BCC, subject, and body. Business users can apply the email templates in AgilePoint Envision.



Add a Global Email Template

You can create a global email template, which all Envision users can use to create email notifications.

1. On the Enterprise Manager Main Page, click the **Global Email Templates** link. The Global Email Templates page appears.
2. Click the **Add** button. The Global Email Templates pop-up appears.



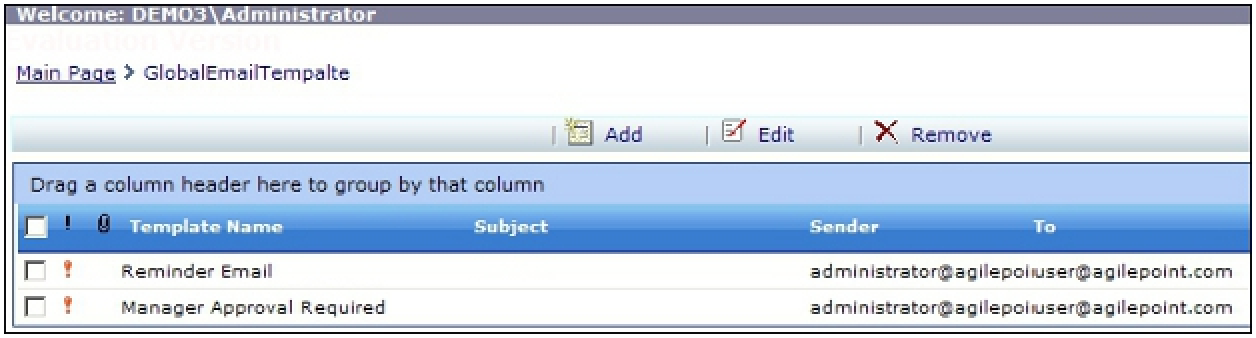
3. On the Global Email Templates pop-up, enter the information you would like to include in the global email template. Note that when Envision users select this template, they can modify it for their needs as required. For more information, see Email Template Window on the AgilePoint Support Portal.
4. When you have finished, click **Add Template**.

Remove a Global Email Template

You can delete, or remove, a global email template.

1. On the Enterprise Manager Main Page, click the **Global Email Templates** link. The Global Email Templates page appears.

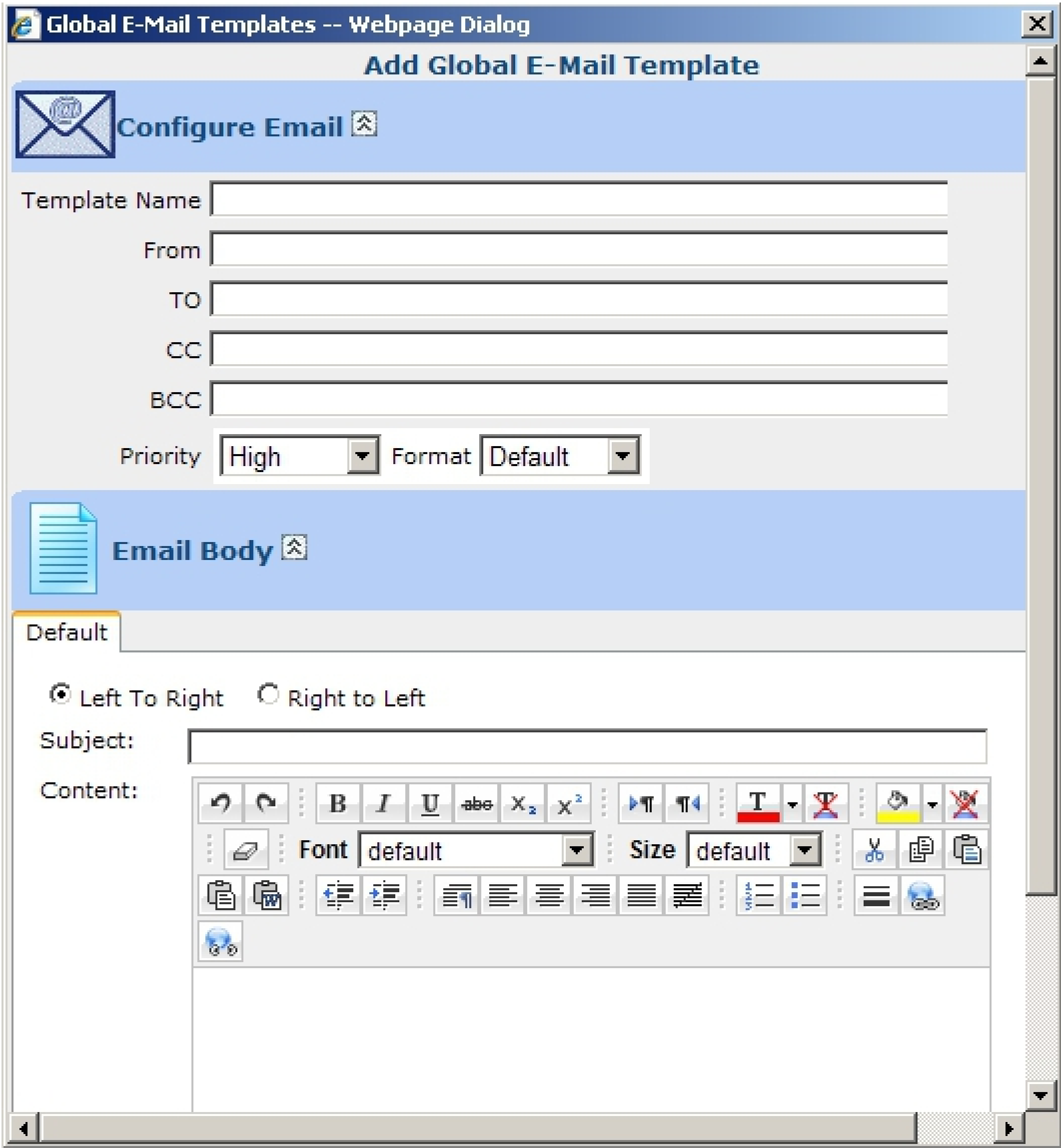
2. On the **Global Email Templates** page, select the templates you want to remove, and click the **Remove** button.



Edit a Global Email Template

You can edit a global email template that has already been created.

1. On the Enterprise Manager Main Page, click the **Global Email Templates** link. The Global Email Templates page appears.



2. On the Global Email Templates page, select the templates you want to edit, and click the **Edit** button. The Global Email Templates pop-up appears.
3. On the Global Email Templates pop-up, enter or modify the information you would like to include in the global email template. Note that when Envision users select this template, they can modify it for their needs as required. For more information, see Email Template Window on the AgilePoint Support Portal.
4. When you have finished, click **Update Template**.

Reports Page

This page allows the administrator to manage and configure reports based on AgilePoint related data.

SQL Server Reporting Services

AgilePoint provides special integration features for SQL Server Reporting Services and comes with a set of pre-configured sample reports built using SQL Server Reporting Services. AgilePoint Enterprise Manager provides the user interface for building, viewing, and exporting reports. Although SQL Server Reporting Services is most often used, Crystal Reports, Microsoft Excel, and other reporting technologies can also be used to build your own reports as needed. The AgilePoint database schema is fully documented and can be used to facilitate custom reports. AgilePoint server also exposes a wide range of Web services that can be used to query and retrieve process-related data from AgilePoint Server. This data can be used to generate reports in a variety of ways using a variety of tools. You can also leverage AgilePoint APIs that will return process and run time statistic data in the form of XML. The XML data can then be used in a custom reporting tool that takes XML as an input.

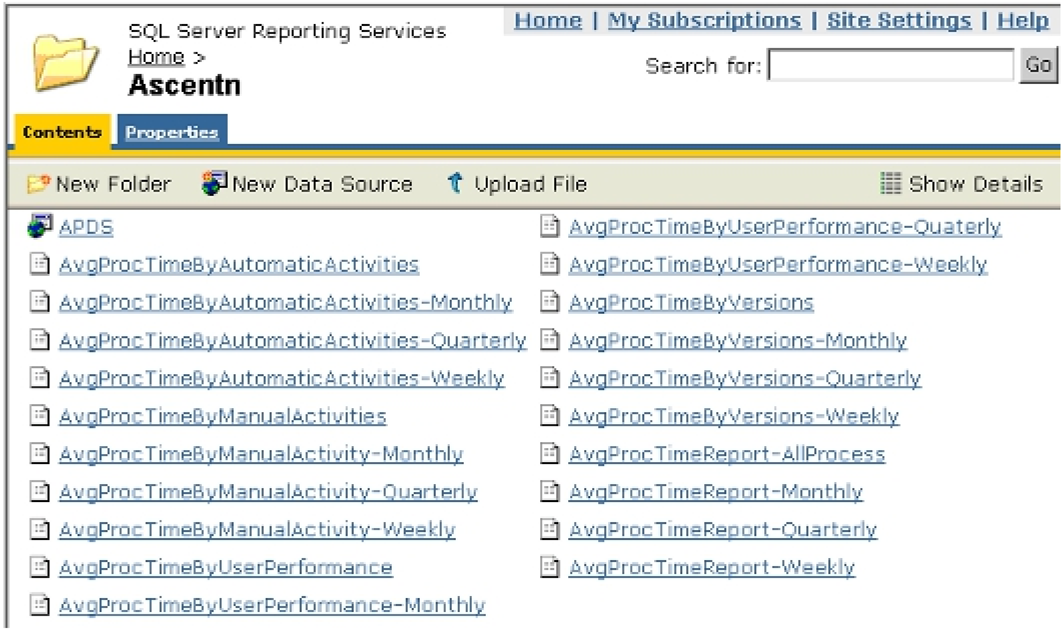
The AgilePoint SQL Server Reporting Services Integration is installed as part of the AgilePoint Enterprise Manager installation. During the installation of Enterprise Manager, the installer will prompt you to install the AgilePoint SQL Server Reporting Services Integration component, which includes a set of pre-configured sample reports. To install this component requires that you have a working instance of Microsoft SQL Server Reporting Services installed. Refer to the AgilePoint Installation Guide for more information on installing the AgilePoint SQL Reporting Services Integration.

Sample Reports

AgilePoint comes with a number of pre-configured sample reports. Once the AgilePoint SQL Server Reporting Services Integration and the sample reports are installed, you can access them from the Enterprise Manager Reports page. The sample reports include:

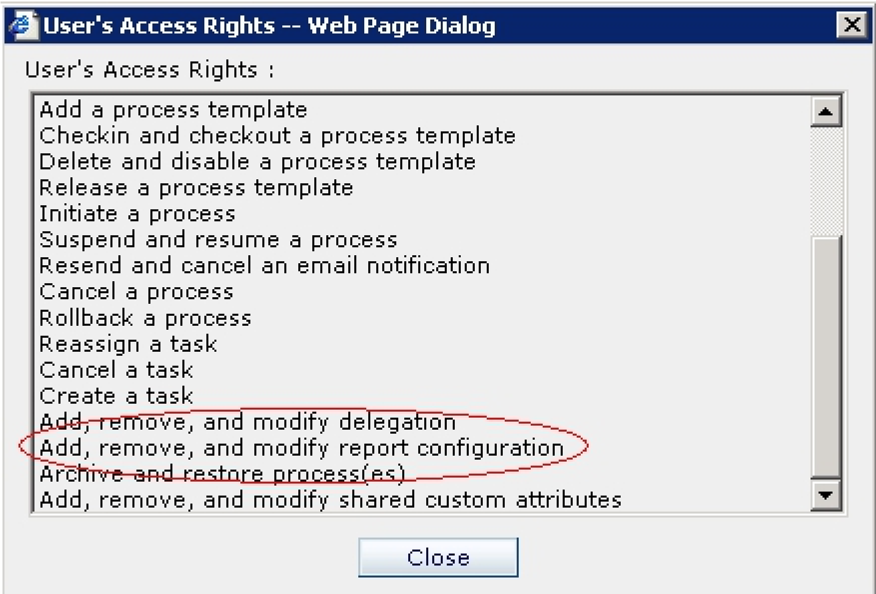
- Average Process Time by Automatic Activities
- Average Process Time by Automatic Activities - Monthly
- Average Process Time by Automatic Activities - Quarterly
- Average Process Time by Automatic Activities - Weekly
- Average Process Time by Manual Activities
- Average Process Time by Manual Activities - Monthly
- Average Process Time by Manual Activities - Quarterly
- Average Process Time by Manual Activities - Weekly
- Average Process Time by User Performance
- Average Process Time by User Performance - Monthly
- Average Process Time by User Performance - Quarterly
- Average Process Time by User Performance - Weekly
- Average Process Time by Versions
- Average Process Time by Versions - Monthly
- Average Process Time by Versions - Quarterly
- Average Process Time by Versions - Weekly
- Average Process Time Report - All Process
- Average Process Time Report - Monthly
- Average Process Time Report - Quarterly
- Average Process Time Report - Weekly

The AgilePoint sample reports are deployed to SQL Server Reporting Services during the installation. Open **Microsoft SQL Server > Reporting Services > Report Manager** and click the **AgilePoint** link. The sample reports are stored here, additional reports can be added as desired.



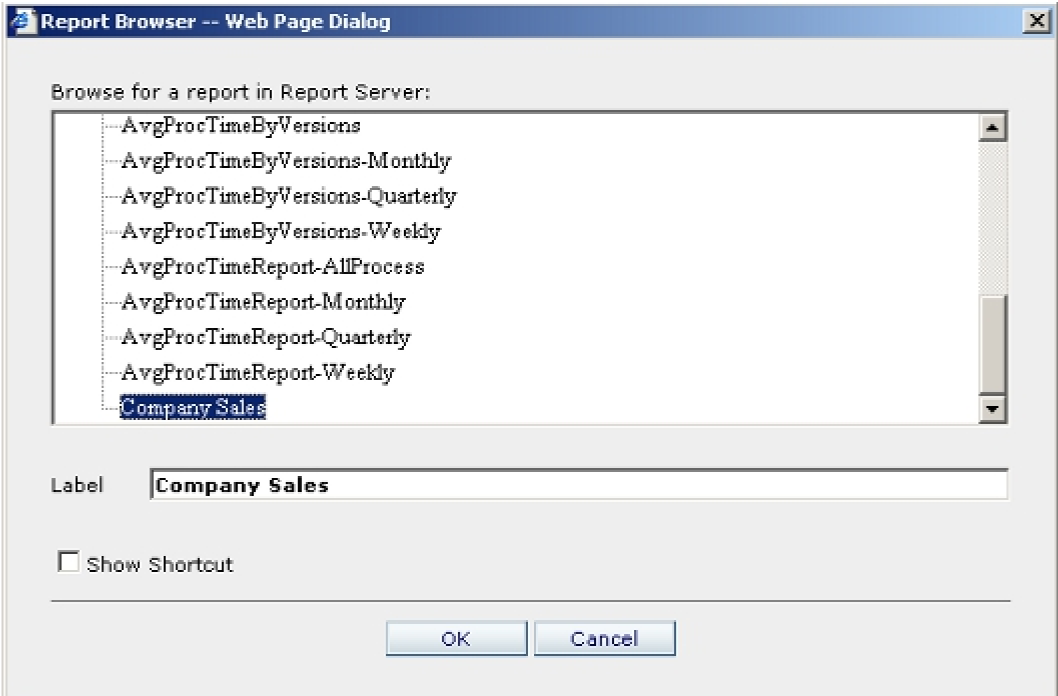
The AgilePoint sample reports are accessed from the Enterprise Manager Main Page by clicking the Configuration link in the Report Management section. The sample reports show on the Reports page. The Reports page allows you to add, edit, or delete a report.

Report name	URL	Created Date & By	Shortcut
Average Process Time - Monthly	/All Monthly	2/24/2007 by DEMO3\Administrator	No
Average Process Time - Quarterly	/All-Quarterly	2/24/2007 by DEMO3\Administrator	No
Average Process Time - Weekly	/All Weekly	2/24/2007 by DEMO3\Administrator	No
Average Process Time By Automatic Activities	/Report for All Process	2/23/2007 by DEMO3\Administrator	No
Average Process Time By Automatic Activities - Quarterly	/Automatic Activities-Quarterly	2/24/2007 by DEMO3\Administrator	Yes
Average Process Time By Automatic Activities - Weekly	/Automatic Activities-Weekly	2/24/2007 by DEMO3\Administrator	No
Average Process Time By Automatic Activities-Monthly	/Automatic Activities-Monthly	2/24/2007 by DEMO3\Administrator	No
Average Process Time By Manual Activities	/By Manual Activities	2/24/2007 by DEMO3\Administrator	No
Average Process Time By Manual Activities - Monthly	/Manual Activity-Monthly	2/24/2007 by DEMO3\Administrator	No
Average Process Time By Manual Activities - Quarterly	/Manual Activity-Quarterly	2/24/2007 by DEMO3\Administrator	No



To add a report to Enterprise Manager:

1. Open SQL Server Reporting Services and click the AgilePoint link.
2. Click Upload File.
3. Browse and select the report file for which you want to add. The report file is added.
4. Open Enterprise Manager and click the Configuration link. The Report Management window appears.
5. Click Add. The Report Browser window appears. The Report Browser window displays all the reports that reside on the Report Server. From this window you can select a report from the Report Server to add in Enterprise Manager.



6. Select the newly added report and in the **Label** field, type a name for the report.

   Checking the Show Shortcut check box will display a shortcut link to the report on the AgilePoint Enterprise Manager Main Page. A maximum of three (3) report shortcuts can be displayed on the Enterprise Manager Main Page at a time.

7. Click OK. The report is added. To edit a report in Enterprise Manager:
8. From the Report Management page, click the option button next to the report for which you would like to edit and click Edit. The Report Browser window appears.
9. Change the **Label** name and click **OK**. The report is now renamed to the new name.

To delete a report in Enterprise Manager:

1. From the Report Management page, click the option button next to the report for which you would like to delete and click Delete. Click OK in the confirmation window. The report is deleted from the list.

To create a report:

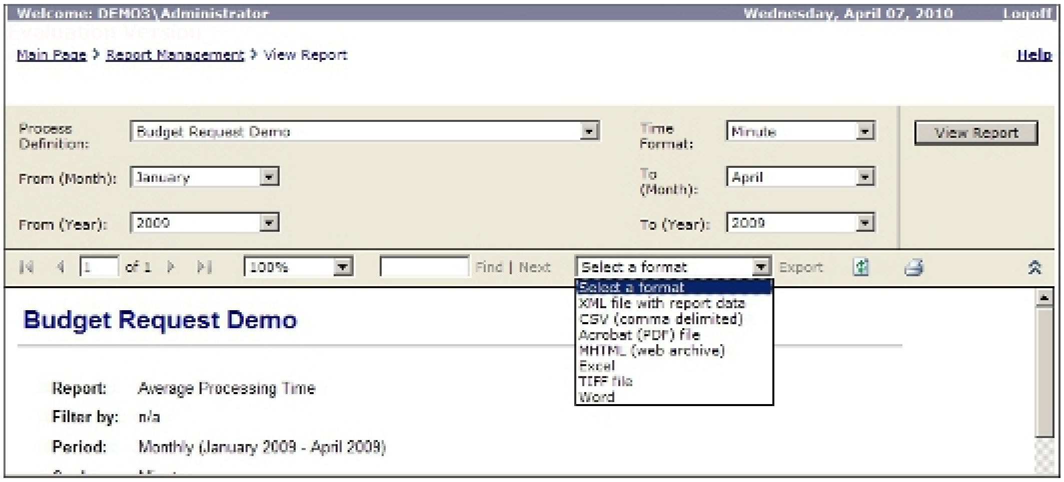
1. From the Report Management page, click the Average Process Time by Automatic Activities link. The View Report page appears. The View Report page requires some configuration parameters.
2. In the **Process Definition** drop-down list, select ExpenseReport_InfoPath as the Process Template you want this report to run against.
3. In the **Time Format** field, select Hour and click View Report to generate the report.

To export a report:

You can export the report into various formats such as HTML, CSV, XML.

1. Click the Select a format drop-down list and select CSV (comma delimited).

2. Click Export.



AgilePoint Licensing and Activation

This section provides information about AgilePoint licensing.

License Usage Calculations

This section provides information about license usage.

How AgilePoint License Usage is Calculated

Summary

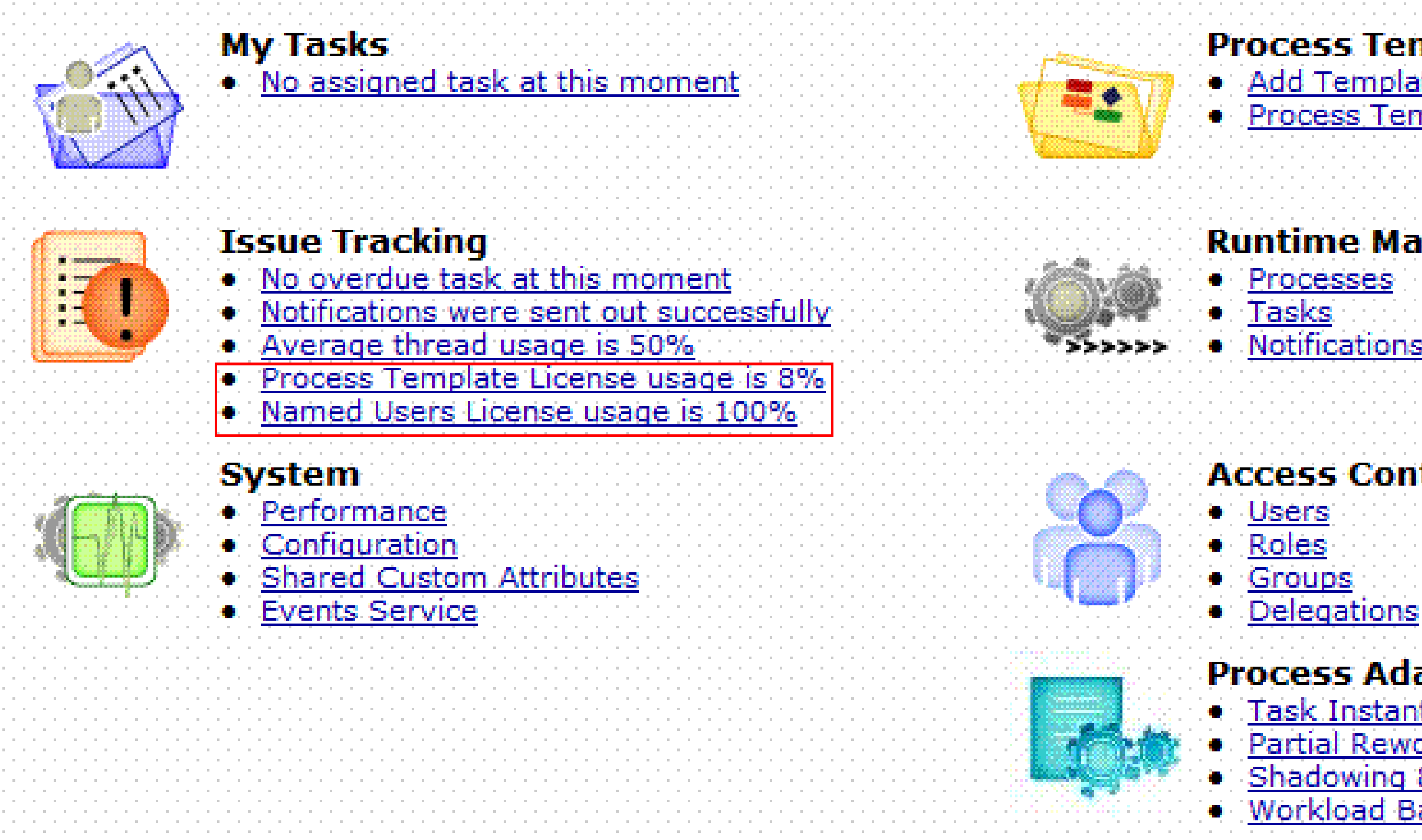
This article provides information about how the AgilePoint licensing percentages are calculated. Based on your AgilePoint license agreement, the following information will help you understand how to retrieve and interpret your Named User License usage and Process Template License usage.

Applies To

- Named User License Usage
- Process Template License Usage

More Information

AgilePoint Enterprise Manager displays the Process Template License usage and Named Users License usage percentages as shown below.



* Process Template License usage is calculated using the following formula:

$$\frac{\text{[Total \# of Child Process Templates]/SubProcess Ratio + [Total \# of Non-Child Proce}}{\text{Total \# of Licensed Process Templates}}$$

For example, if the total number of Child Process templates is 20, the subprocess ratio is 5, the total number of Non-Child Process Templates is 10, the total number of Licensed Process Templates is 20, the average Process Template License usage would be 20/5 + 10 / 20 = .7 or 70%.

* Named User License usage is calculated using the following formula:

$$\frac{\text{Total \# of AgilePoint Registered Users}}{\text{Total \# of Named Users in the License Agreement}}$$

For example, if the total number of AgilePoint Registered Users is 35, and the total number of named users in the license agreement is 70, the Average Thread Usage would be 35/70 = .5 or 50%.

AgilePoint Floating License FAQ

What is an AgilePoint Floating User License?

For newAgilePoint customers purchasing AgilePoint BPMS v5.0 or higher, the AgilePoint Floating User License is available. In a floating license model, only the active AgilePoint BPMS system users are counted against the number of purchased license seats. The number of active users is defined as the number of user sessions on the AgilePoint Server at a given time.

A user session lasts from initial login from any application to the time the session times out. (The timeout period is configurable.) If the user logs in before the current session times out, the session and the timeout period are renewed. Applications that can initiate a user session include AgilePoint Envision, AgilePoint Enterprise Manager, SharePoint, customized web applications, or web service calls from Microsoft Internet Explorer.

How can I estimate my number of users for an AgilePoint Floating User License?

Use the following calculation to estimate the number of users you will require under the AgilePoint Floating User License. Note that this is a basic estimate to be used as a general guideline intended as a starting point. You can use your own estimating scheme if desired.

[total number of AgilePoint users] * [average number of hours per day each user will be actively using AgilePoint] / [number of hours per work day] = [number of required floating license seats]

Example: 200 total AgilePoint users * **2** hours average usage per user per day / **8** hours per work day = **50** floating user license seats

What happens if my total number of concurrent users exceeds my maximum number of active user license seats?

If your total number of concurrent users exceeds the maximum number of active users allowed by your License Agreement, the AgilePoint Server will generate an email warning to the system administrator. At this point, system performance may slow somewhat.

If you receive a warning regarding your maximum users, AgilePoint recommends that you 1) monitor your license usage, 2) try tuning your session timeout settings to accommodate your current user load, and 3) purchase additional license seats if required.

How can I monitor my actual number of active users once the system is up and running?

To monitor your actual number of users, query the AgilePoint database to analyze your maximum number of users in a day, and the frequency with which that maximum is reached. The AgilePoint system refreshes the user session count every 10 minutes. A record is generated each time the maximum number of license seats is reached.

To monitor your license usage, run the following query against the AgilePoint Database:

select DATE_OCCURRED, OBJECT_INFO, DESCRIPTION as WARNING from WF_AUDIT_TRAILS where CATEGORY=7 order by DATE_OCCURRED desc

The results look like the following. **L=*n*** represents the maximum number of floating license seats. **A=*n*** represents the number of active user sessions.

DATE_OCCURRED

OBJECT_INFO

WARNING

2010-05-10 17:34:40.027

L=2,A=3

The maximum number of concurrent users allowed by your AgilePoint License Agreement is 2, but your actual n ….

2010-05-10 17:29:04.400

L=2,A=2

NULL

In addition, you can run the query in Microsoft Excel to create graphs that will enable you to track your usage over time. For Excel, create the following view:

CREATE VIEW WFV_FLOATING_SESSIONS as select DATE_OCCURRED as [TIME],CONVERT(INT, RIGHT(OBJECT_INFO, LEN(OBJECT_INFO) - CHARINDEX('A=',OBJECT_INFO) - 1)) as ACTIVATED_SESSIONS, DESCRIPTION as WARNING from WF_AUDIT_TRAILS where CATEGORY=7

Then create the following query:

select * from WFV_FLOATING_SESSIONS

TIME

ACTIVATED_SESSIONS

WARNING

2010-05-10 17:34:40.027

3

The maximum number of concurrent users allowed by your AgilePoint License Agreement is 2, but your actual n ….

2010-05-10 17:29:04.400

2

NULL

How can I tune my server settings to better accommodate my current number of user licenses?

If your number of concurrent, active user sessions are exceeding the number of seats in your Floating User License Agreement, you can change the session timeout interval to better accommodate your usage.

There is a tradeoff between greater numbers of available license seats and system performance. If you have shorter session timeouts, you tend to have a higher number of available license seats, but frequent user session renewals can negatively impact system performance. On the other hand, if you have a longer user session timeout period, performance is better because the system is not renewing user sessions as often. However, longer timeouts can yield fewer available license seats and active sessions for users who are not actively using the AgilePoint system.

To modify the session timeout, in the AgilePoint **neflow.cfg** file in the **<server>** node, modify the value of the **UALExpirationPeriod** attribute (<server UALExpirationPeriod="n" ...>). The unit for this value is minutes. The minimum value is **15**.

How can I purchase additional license seats?

To increase your floating license capacity, contact AgilePoint Sales.

Finding and Obtaining License Keys

This section provides instructions for finding and obtaining AgilePoint license keys.

Finding the License Key for an Installed AgilePoint Component

Applies To

- AgilePoint Suite Licensing Information
- AgilePoint Envision
- AgilePoint Server
- AgilePoint Developer

Objective

To provide instructions for finding the License Key that is associated with an installed AgilePoint component.

Summary

The License Key for a particular installed AgilePoint component (Envision, Server, Developer) can be found by either using the utility attached below or by navigating the registry.

Resolution

Solution 1:

The easiest way to find the license key associated with a particular installed AgilePoint component is to download and run the **ShowlicenseKey.exe** utility. This utility can be downloaded as an attachment below.

Solution 2:

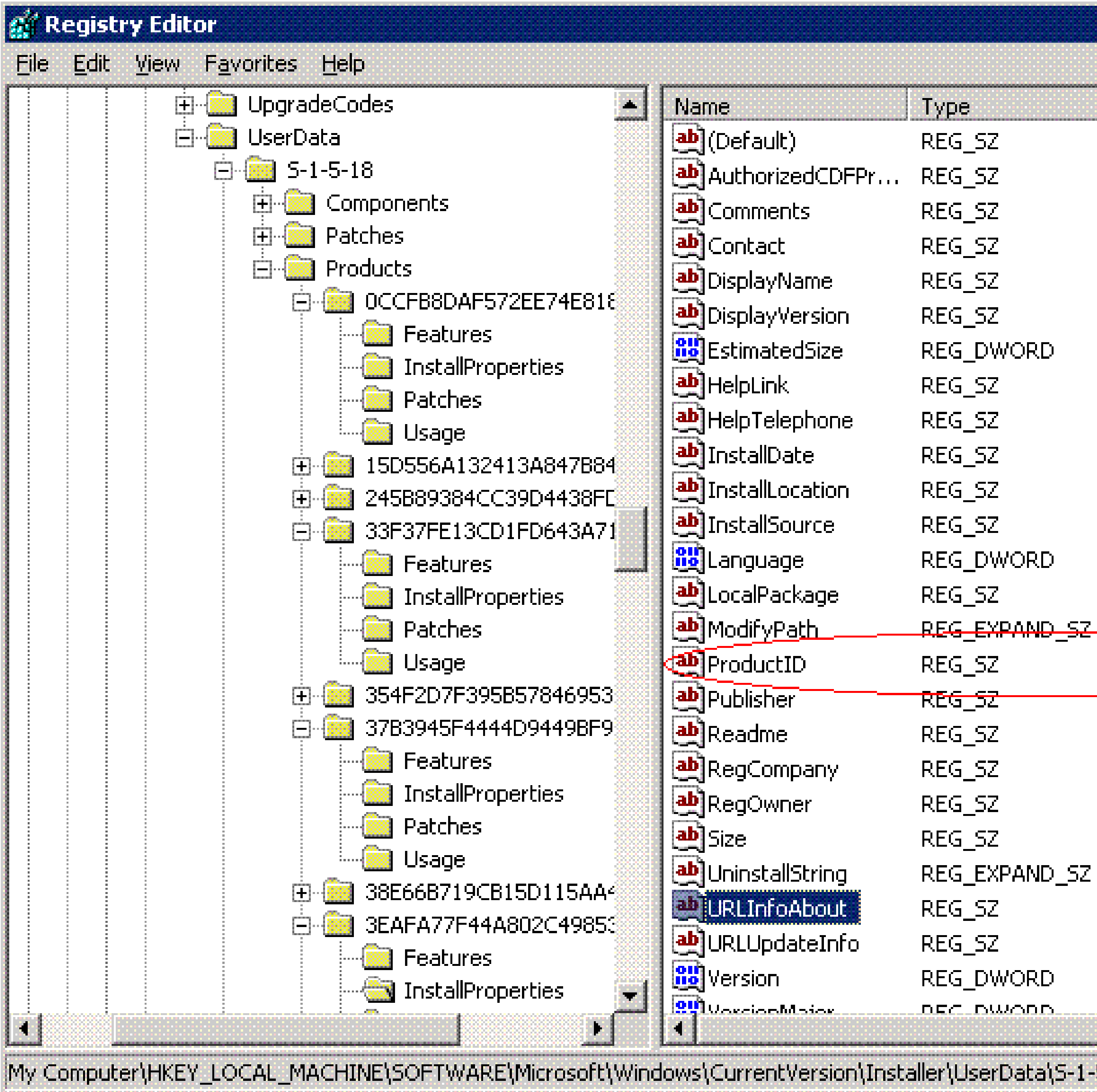
An alternative solution to finding the license key associated with a particular installed AgilePoint component is via the registry as is detailed below.

1. Click **Start** > **Run**.
2. In the **Open** field, type **regedit** and click **OK**.

3. Navigate to the following location:

   ```
   My Computer\HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion
   \Installer\UserData\
   ```

4. Right click on the **UserData** folder and click **Find**.
5. Type **www.ascentn.com** and click **Find Next**.
6. Press the **F3** key until you see "AgilePoint Server" in the **Display Name** field. The Product ID field shows the License Key information as shown below:



7. Continue pressing the **F3** key until you find the AgilePoint Developer and AgilePoint Envision components, each of which displays a Product ID field. This is the License Key used for the installation.

Obtaining AgilePoint License Keys

AgilePoint BPMS requires license keys for installation and activation.

Prerequisites

- These instructions apply to the following licensed components of the AgilePoint BPMS Suite:
  - AgilePoint Server
  - AgilePoint Envision
  - AgilePoint Developer
  - AgileReports
- Allow at least one full business day for license keys to be provided following your request.

Instructions

To obtain new license keys, contact AgilePoint Customer Support.

When requesting new license keys, please provide the following information:

- Your name.
- The name of your company or organization.
- The version numbers and the names) of the AgilePoint products that you are planning to install.
- The type (e.g. Evaluation, Development, Production, or Clustered) of license keys and the quantity for each of the AgilePoint products that you are planning to install.
- If you are requesting a license key as a replacement for a previously issued license key, please provide the original license key as well.

Each license key can only be used on one machine.

Replacing Temporary License Keys with Production License Keys

Applies To

- AgilePoint Envision
- AgilePoint Developer
- AgilePoint Server

Summary

Can I force my evaluation key to expire early?

Can I extend my evaluation key before it expires?

I have an important demo coming up and I am worried that my evaluation key may expire around the demo time. Is there a way I can reactivate or extend the evaluation key prior to its expiration?

I have purchased permanent keys, how can I replace my evaluation keys with the permanent keys?

Yes. You will need to create a ticket on the AgilePoint Support portal and request the **AgilePointReactivation.zip** package. After you have received the package, you can use the instructions below to force your evaluation keys to expire early and replace your evaluation keys with permanent keys. Then you will be able to re-activate the product(s) using your new keys.

Details

If you want to reactivate AgilePoint Server, simply copy the new **AgilePoint Server.dat** file to the **C:/Program Files/Common Files/Ascentn** folder and replace the existing file. Next time you bring up the AgilePoint Server Configuration (via **Start > All Programs > Ascentn > AgilePoint Server Configuration**), it will prompt you to enter the new license key. Follow the same procedure for AgilePoint Envision and AgilePoint Developer. For more information on activating a particular AgilePoint component, see the related articles below.

Keep these .dat files handy as you may want to use them again later.

NOTE: You will need to request new license keys to extend your evaluation. See the related articles below for instructions on how to extend your evaluation.

Activating AgilePoint Licenses

This section provides instructions for activating the licensed components of the AgilePoint BPMS Suite:

- AgilePoint Envision
- AgilePoint Developer
- AgilePoint Server

Activating Over the Internet

Internet activation is recommended for all machines with Internet connections.

Prerequisites

- An Internet connection
- Administrator privileges
- You are running a licensed product that meets one of the following conditions:
    - It is the first time you've run the product after installation
    - It is the first time you've run the product after an evaluation license key expired

Navigation

1. Open the application you want to activate. The Activation Wizard appears.

Instructions

1. On the **Activation Wizard**, select **Activate by using Internet**.

2. Click **Next**.

Your product should be activated automatically within a few seconds.

Activating Manually

Use manual installation if you are unable to activate over the Internet.

Prerequisites

- Administrator privileges
- You are running a licensed product that meets one of the following conditions:
  - It is the first time you've run the product after installation
  - It is the first time you've run the product after an evaluation license key expired

Navigation

1. Open the application you want to activate. The Activation Wizard appears.

Instructions

1. On the **Activation Wizard**, select **Activate manually**.
2. Click **Next**.
3. On the **Product ID** window, click the **Activation Key** link.
4. On the web page that appears, copy the URL, and paste it into a web browser on a machine where an Internet connection can be established. The AgilePoint Activation page appears with the Product ID displayed.

   You can also access the AgilePoint Activation page via the following URL: http://act.agilepoint.com/ActivationServer/ActivationKey.aspx . If you choose this method, you will need to type in the Product ID manually.
5. Click **Submit**. The Activation Key appears.

   If this process fails to generate an Activation Key, email the following information to AgilePoint Customer Support:

   - Your name.
   - The name of your company or organization.
   - Appropriate contact information.
   - The Product ID specified by the Activation Wizard.

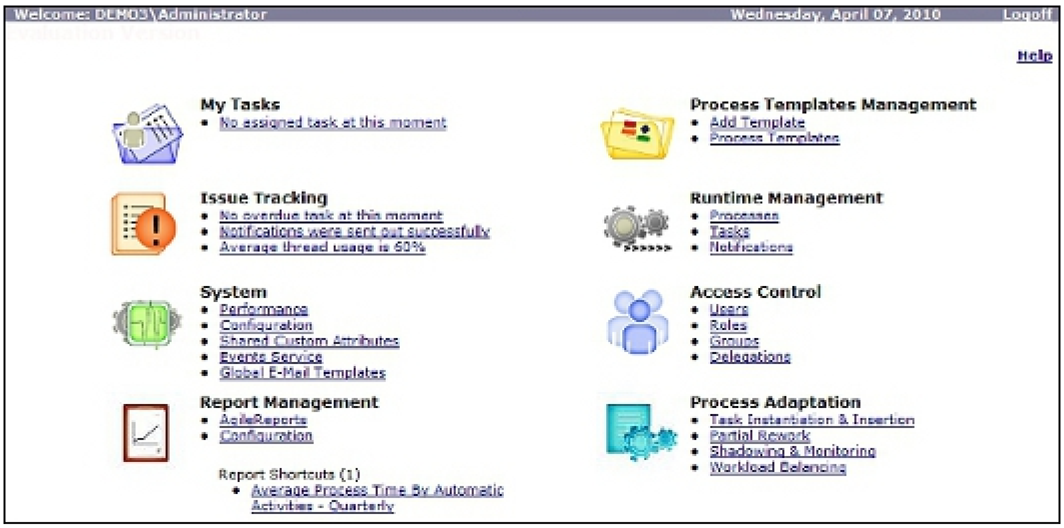
   AgilePoint will reply with the required Activation Key.
6. In the **Activation Wizard** window in the **Activation Key** field, copy and paste the Activation Key.
7. Click **Next**, and then click **Finish**.

Pages

This section provides a list of pages in Enterprise Manager.

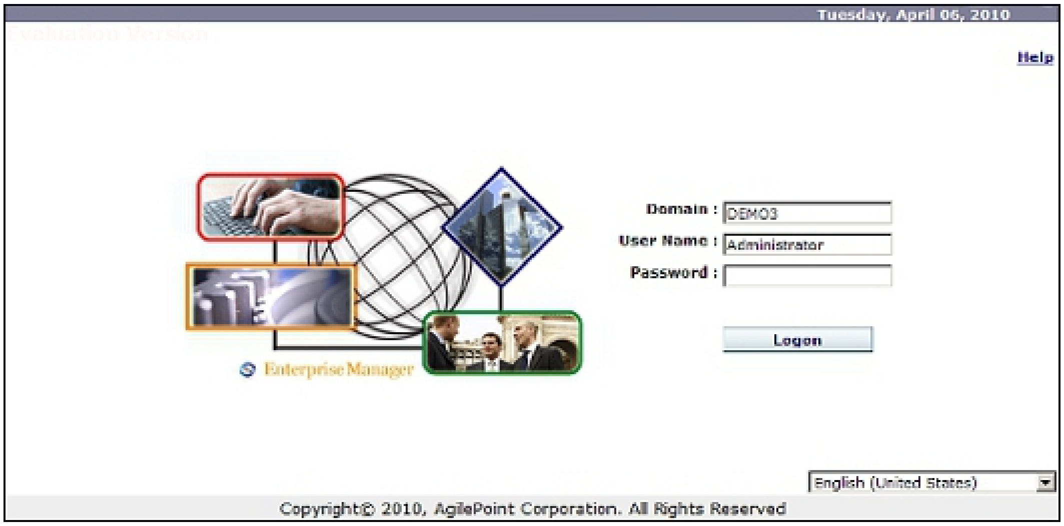
Main Page

This page acts as a portal that allows the administrator to navigate to the various pages of the AgilePoint Enterprise Manager Web application.



Login Page

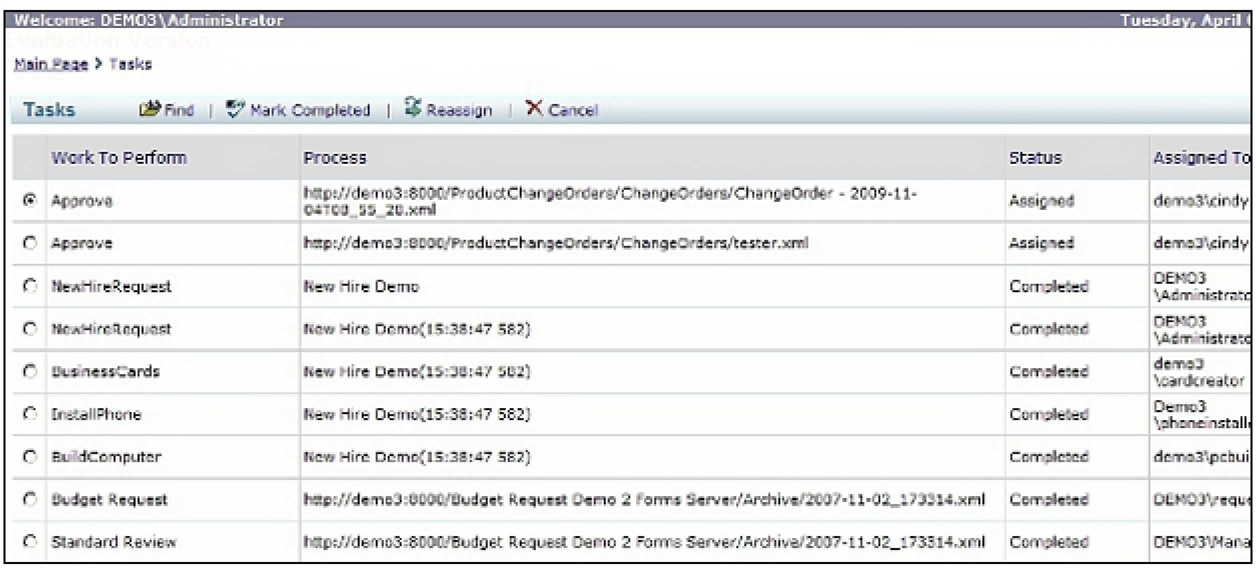
This page allows the administrator to login to the AgilePoint Enterprise Manager Web application.



Tasks Page

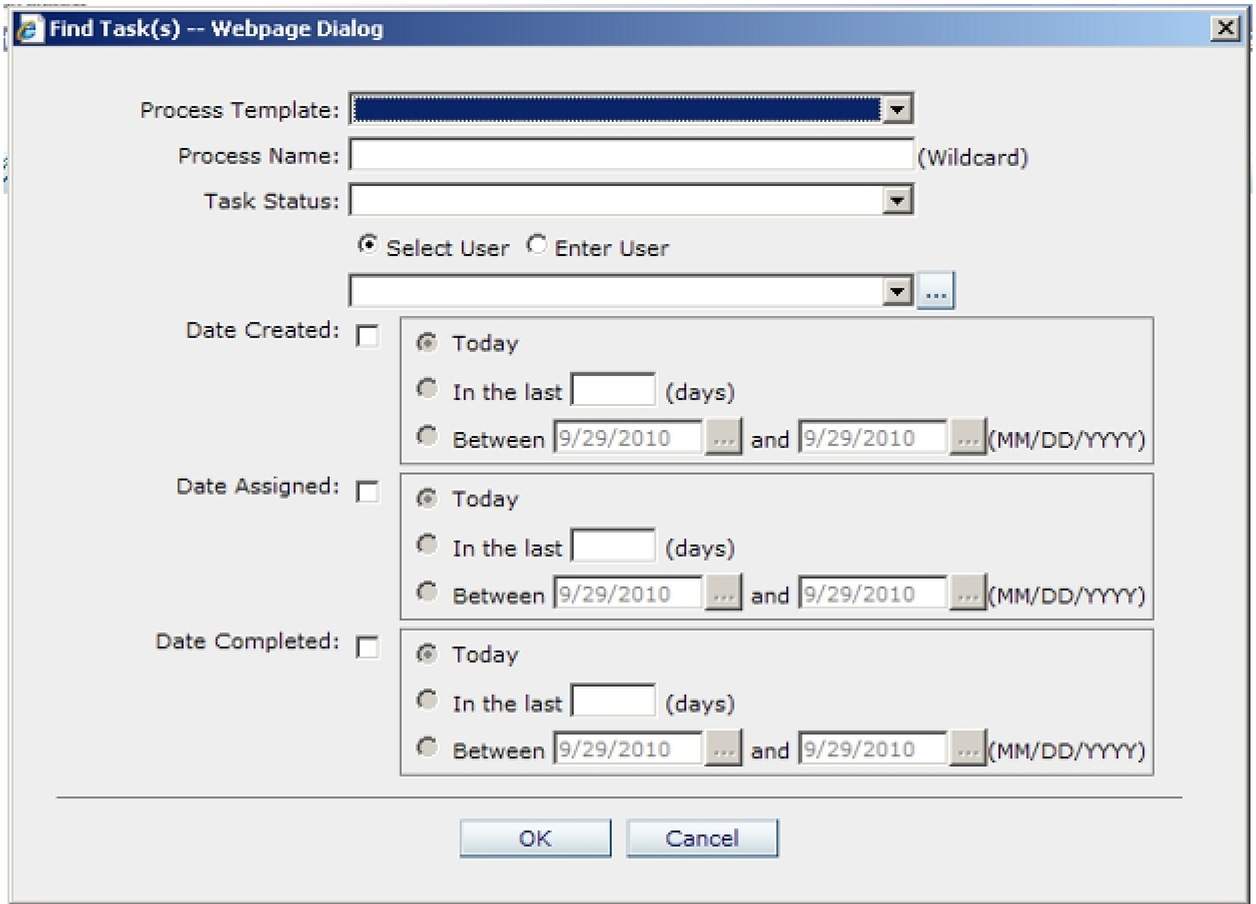
This page allows the administrator to review, search for, and update (e.g. reassign or cancel) the individual workflow tasks managed by AgilePoint Server.

Here is an example of the Tasks page as displayed when using the **My Tasks** link from the main page.



Find Tasks Dialog

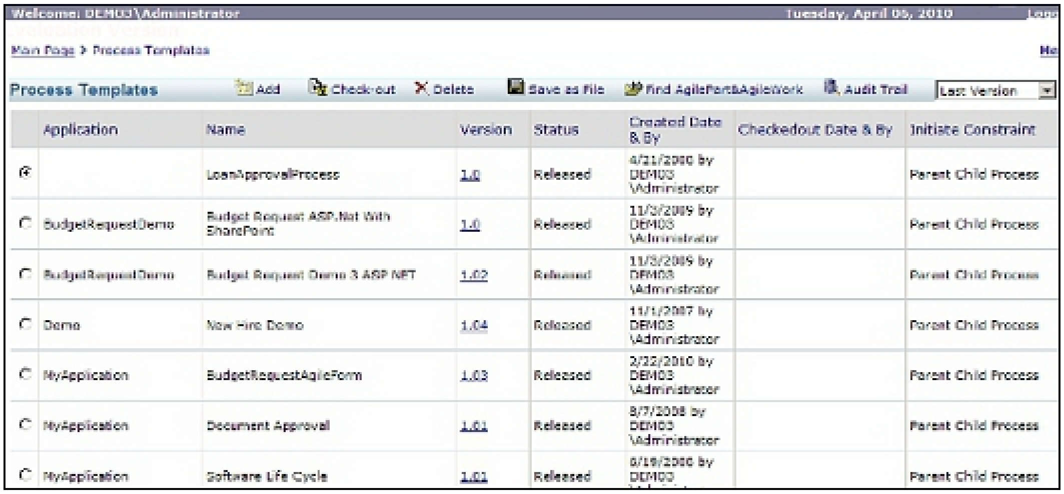
This dialog allows the administrator to search for workflow tasks by specific criteria.



Process Templates Page

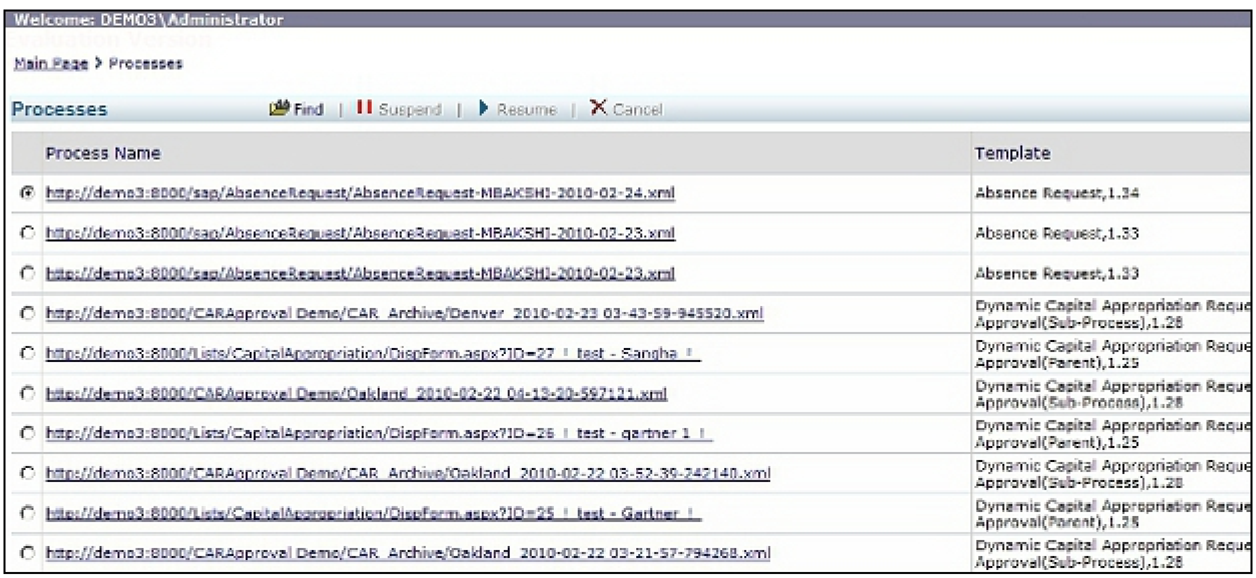
This page allows the administrator to review, search for, and update (e.g. check out) the individual AgilePoint process templates deployed to AgilePoint Server. The Process Templates page also allows the administrator to examine process templates for AgilePart and AgileWork dependencies.

The Process Templates page is pictured below:



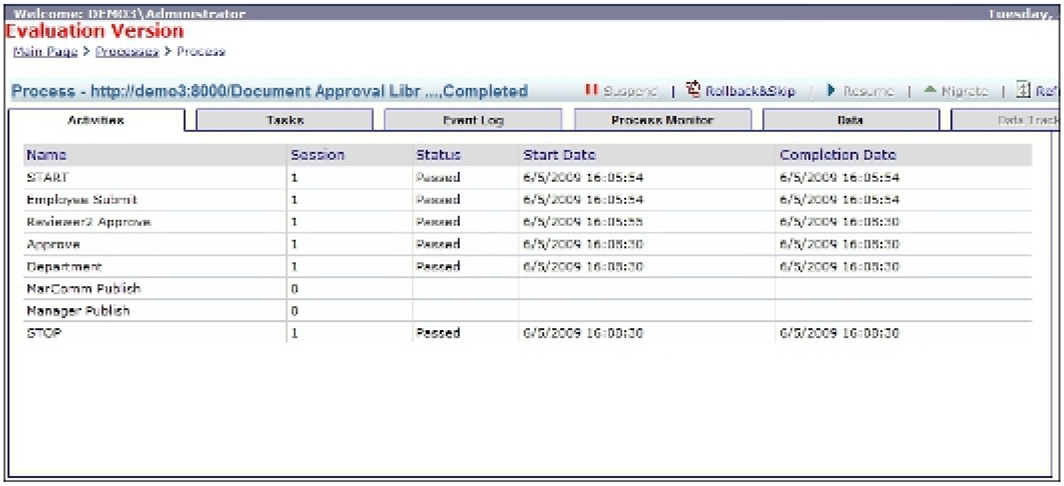
Processes Page

To access the Processes page, click the **Processes** link on the Enterprise Manager Main Menu. The Processes page allows the administrator to first find a process instance for which to perform an action. Once the process is found, actions such as suspend/resume, rollback, cancel, and migrate can be performed on the process instance.



Process Page

The process page provides detailed information about the process instance such as the activities, manual tasks, event log, process monitor, and data elements as shown below. At this layer, the option to migrate the process instance to a new process instance is available.



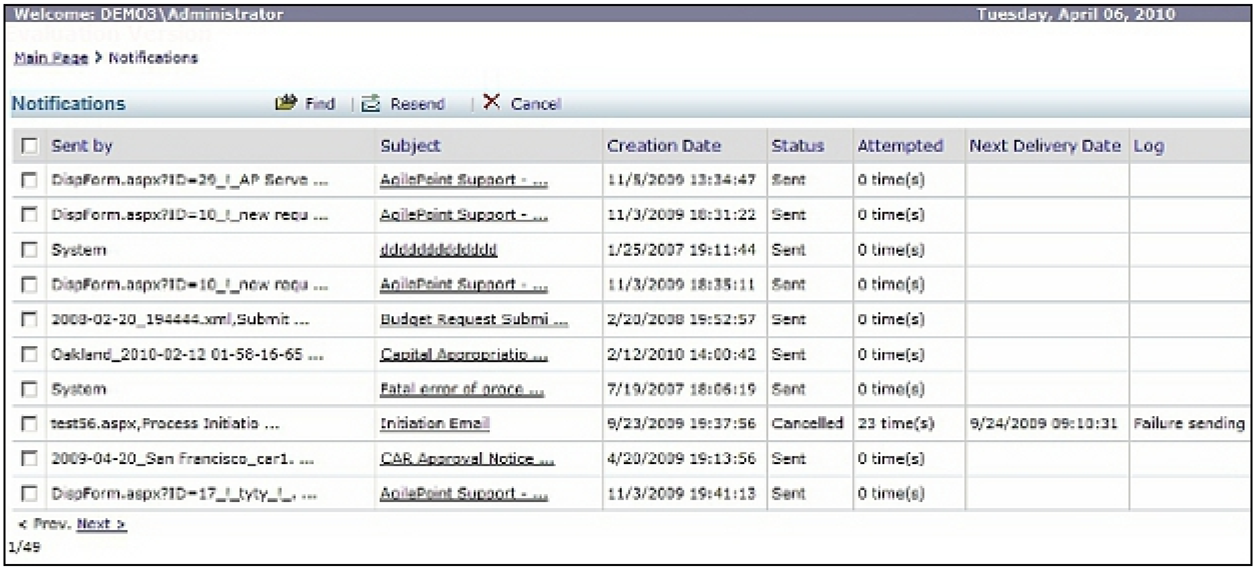
Data Tracking

The DataTracking tab allows the administrator to view for a specific field on a form, the "Old Value" and if the data changes, the "New Value". The following information is available:

- Name of the form field
- Old value before the data was changed
- New value of the data
- The user that changed the data
- The time stamp when the data changed

Notifications page

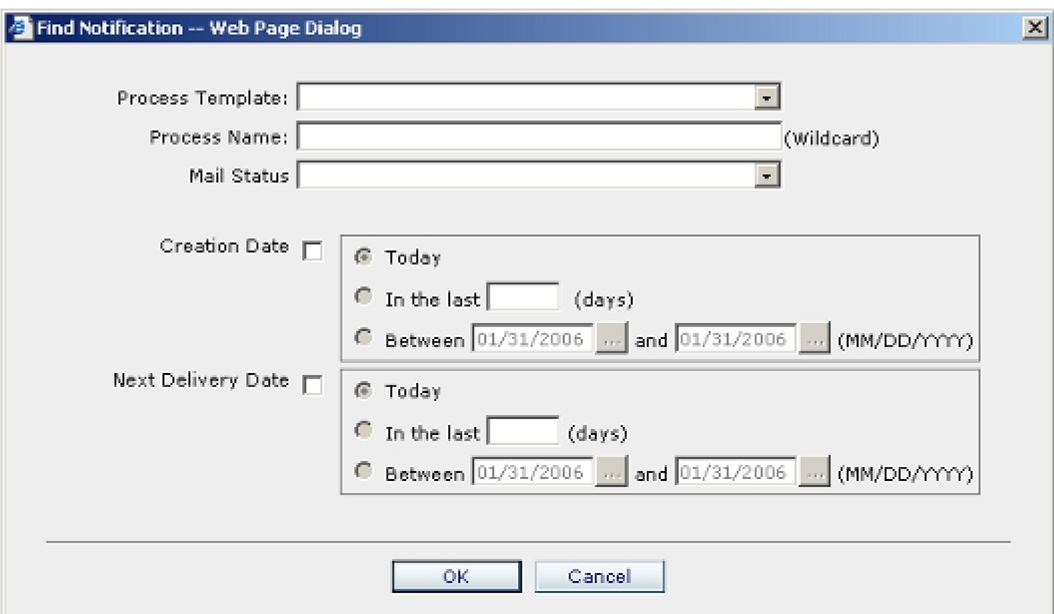
This page allows the administrator to review, search for, and update (e.g. cancel or resend) the individual email notifications managed by AgilePoint Server.



Sent by	Subject	Creation Date	Status	Attempted	Next Delivery Date	Log
DispForm.aspx?ID=29_!_AP Serve ...	AgilePoint Support - ...	11/5/2009 13:34:47	Sent	0 time(s)		
DispForm.aspx?ID=10_!_new requ ...	AgilePoint Support - ...	11/3/2009 18:31:22	Sent	0 time(s)		
System	dddddddddddd	1/25/2007 19:11:44	Sent	0 time(s)		
DispForm.aspx?ID=10_!_new requ ...	AgilePoint Support - ...	11/3/2009 18:35:11	Sent	0 time(s)		
2008-02-20_194444.xml,Submit ...	Budget Request Submi ...	2/20/2008 19:52:57	Sent	0 time(s)		
Oakland_2010-02-12 01-58-16-65 ...	Capital Appropriatio ...	2/12/2010 14:00:42	Sent	0 time(s)		
System	Fatal error of proce ...	7/19/2007 18:06:19	Sent	0 time(s)		
test56.aspx,Process Initiatio ...	Initiation Email	9/23/2009 19:37:56	Cancelled	23 time(s)	9/24/2009 09:10:31	Failure sending
2009-04-20_San Francisco_car1. ...	CAR Approval Notice ...	4/20/2009 19:13:56	Sent	0 time(s)		
DispForm.aspx?ID=17_!_tyty_!_, ...	AgilePoint Support - ...	11/3/2009 19:41:13	Sent	0 time(s)		

Find Notifications Dialog

This dialog allows the administrator to search for email notifications by specific criteria.

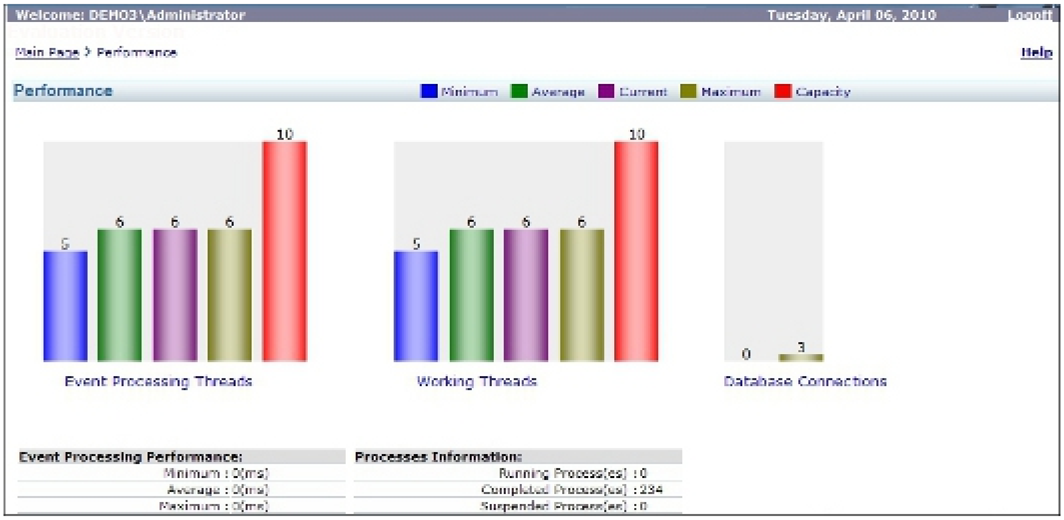


Performance Page

The Performance Page displays data about the runtime performance of AgilePoint Server and the AgilePoint Workflow Engine.

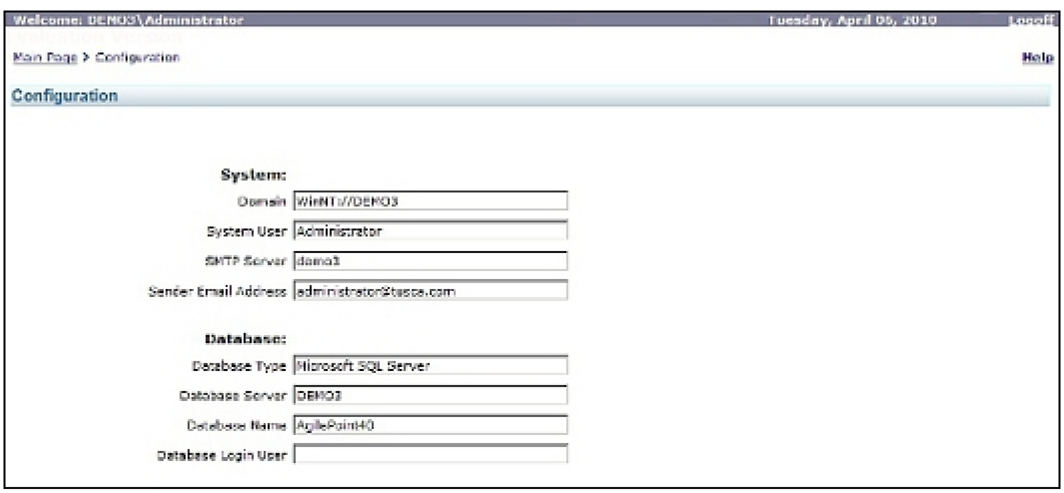
Instructions

1. On the Enterprise Manager Main Page, click **Performance**.



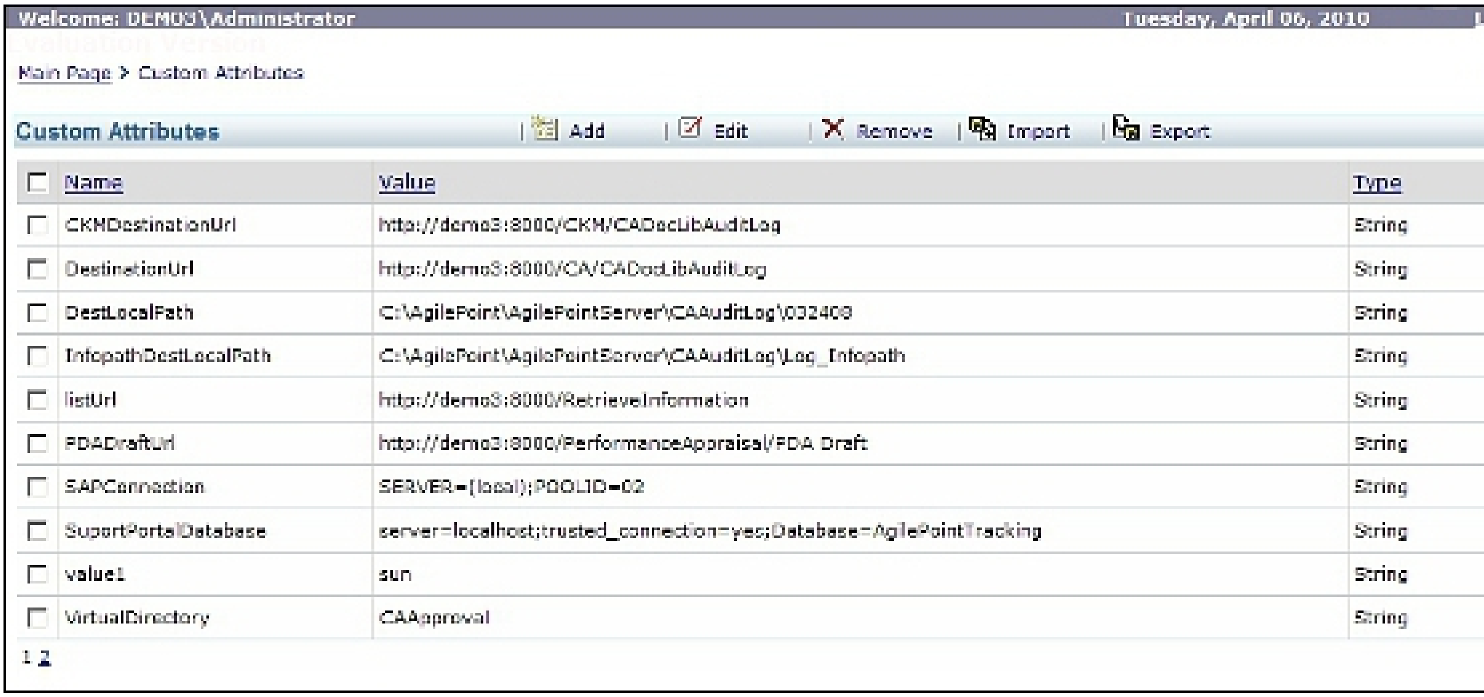
Configuration Page

This page displays the current values of some of the key configuration settings for AgilePoint Server. It does not allow you to change any of these settings. Use the AgilePoint Server Configuration utility to modify the settings.



Shared Custom Attributes Page

This page allows the administrator to view and configure shared custom process attributes that can be accessed from all processes running on the server (regardless of which process template the process is associated with).



Name	Value	Type
CKMDestinationUrl	http://demo3:8000/CKM/CADocLibAuditLog	String
DestinationUrl	http://demo3:8000/CA/CADocLibAuditLog	String
DestLocalPath	C:\AgilePoint\AgilePointServer\CAAuditLog\032408	String
InfopathDestLocalPath	C:\AgilePoint\AgilePointServer\CAAuditLog\Log_Infopath	String
listUrl	http://demo3:8000/RetrieveInformation	String
PDADraftUrl	http://demo3:8000/PerformanceAppraisal/PDA Draft	String
SAPConnection	SERVER=(local);POOLID=02	String
SuportPortalDatabase	server=localhost;trusted_connection=yes;Database=AgilePointTracking	String
value1	sun	String
VirtualDirectory	CAApproval	String

Add/Edit Shared Custom Attribute Page

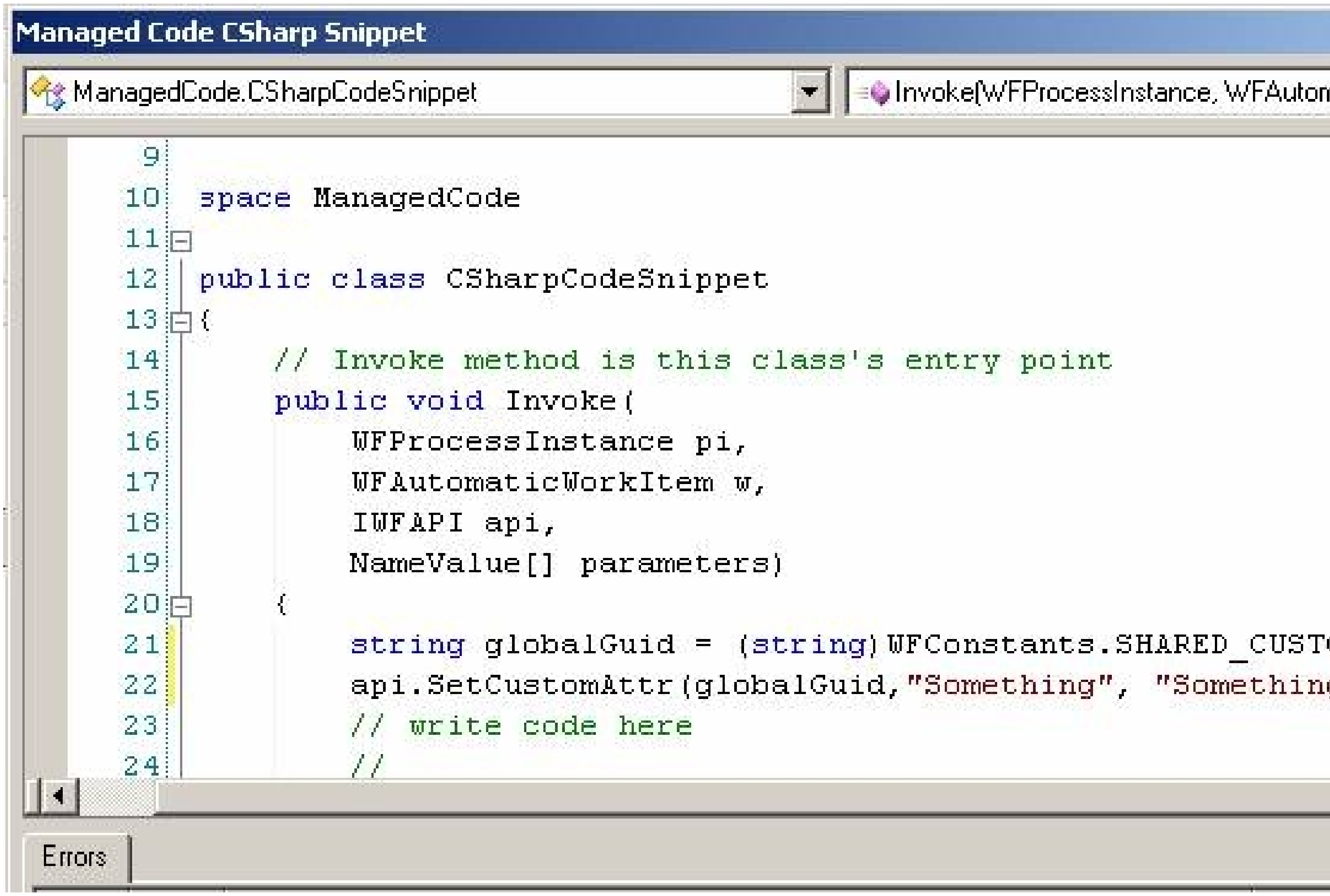
The value of a shared custom process attribute can be modified at run time either manually via AgilePoint Enterprise Manager or programmatically via the Managed Code C# Snippet.

To modify the value of a shared custom process attribute via Enterprise Manager:

This page allows the administrator add or edit a specific shared custom process attribute.

To modify the value of a shared custom process attribute programmatically via the Managed Code C# Snippet:

For example, you have defined a shared custom process attribute called "Something" in Enterprise Manager. You set the value of the shared custom process attribute in Enterprise Manager. You now want to use a Managed Code C# Snippet to dynamically change the value of the shared custom process attribute "Something". Below is the syntax to update the value of the shared custom process attribute "Something"?



Import Shared Custom Attributes Page

In Enterprise Manager, click **Custom Attributes > Import** to modify the system's current Shared Custom Attributes by uploading an XML file containing the new values. For an example of a valid XML file, use the Export Shared Custom Attributes page.

Export Shared Custom Attributes Page

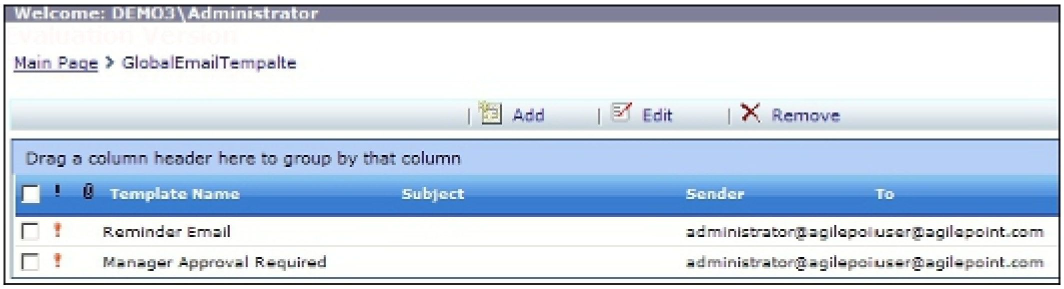
In Enterprise Manager, click Custom Attributes > Export to download a ZIP-compressed XML file containing the system's current Shared Custom Attributes.

Event Service Page

This page allows the administrator to initiate processes automatically via scheduling, email, database, or file dropping. All event listeners can be configured via AgilePoint Enterprise Manager.

Global E-mail Templates Page

This page allows the administrator to add, update, and delete e-mail templates that AgilePoint Envision users can apply to create emails. You can use email templates to apply default values to an email, such as To, From, CC, BCC, subject, and body. Business users can apply the email templates in AgilePoint Envision.

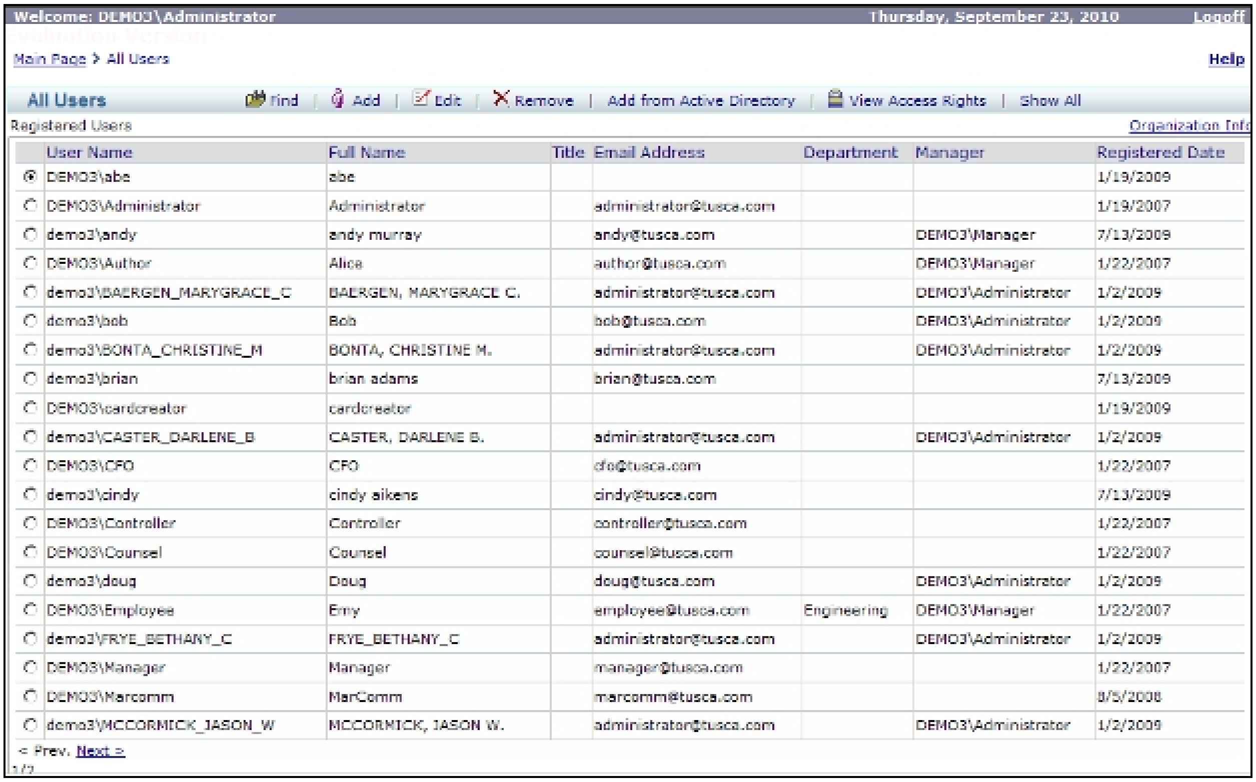


Reports Page

This page allows the administrator to manage and configure reports based on AgilePoint related data.

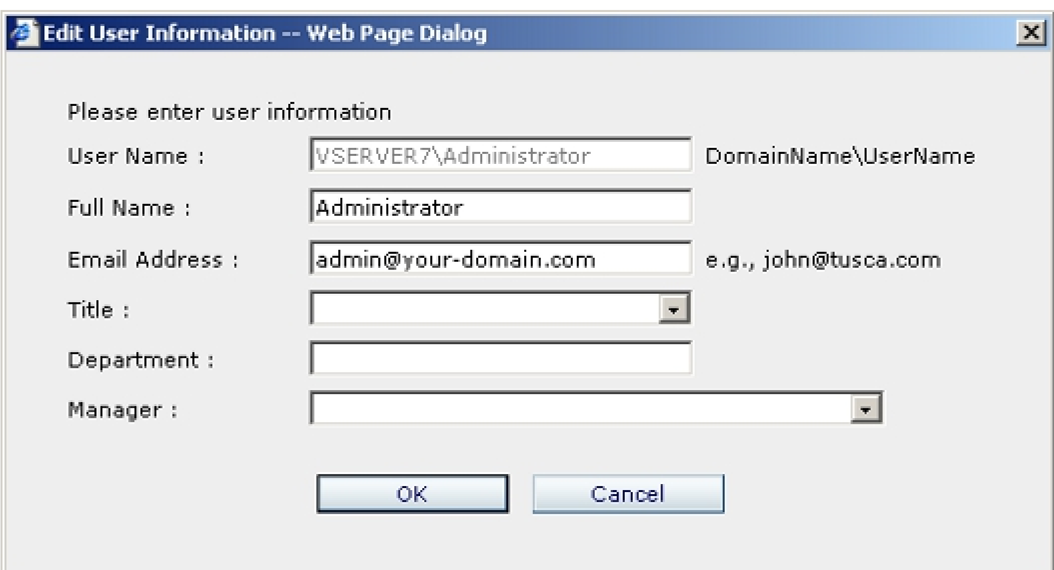
Users Page

This page allows the administrator to view, search for, and update the user account information that is used by AgilePoint Server.



Add/Edit User Dialog

This dialog allows the administrator to add or edit a specific AgilePoint Server user's information.

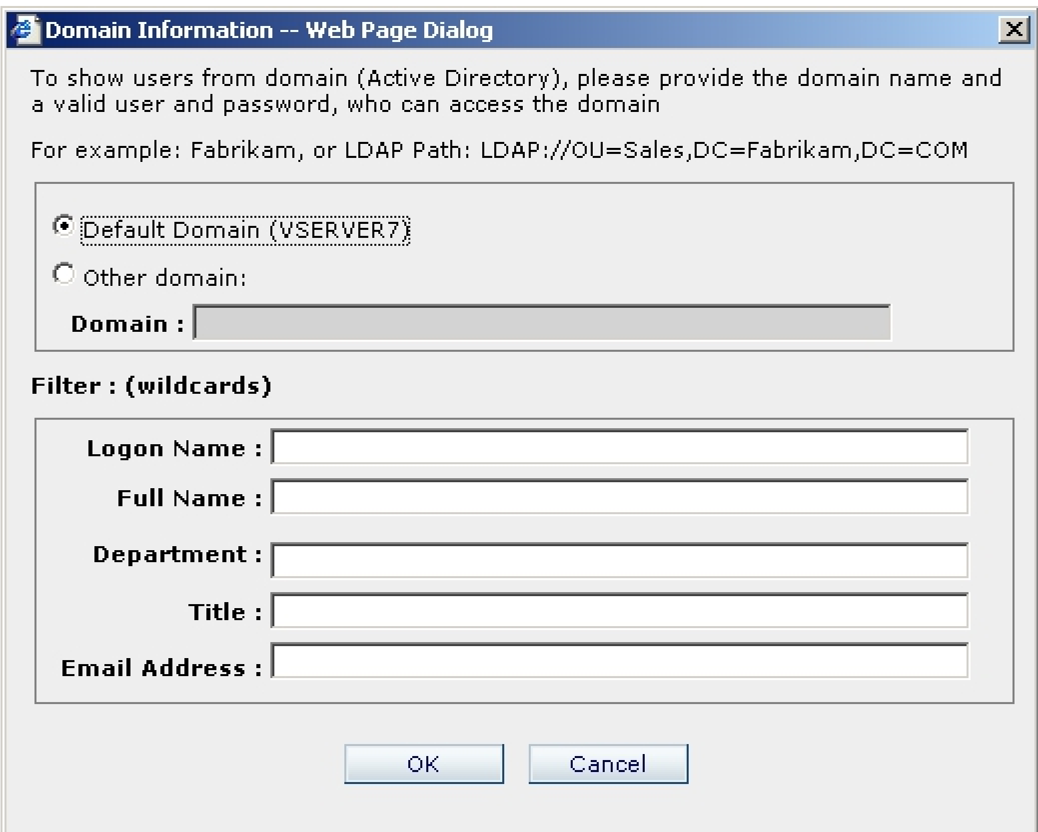


Add User From Active Directory Dialog

This dialog allows the administrator to add new AgilePoint Server users from an Active Directory data source.

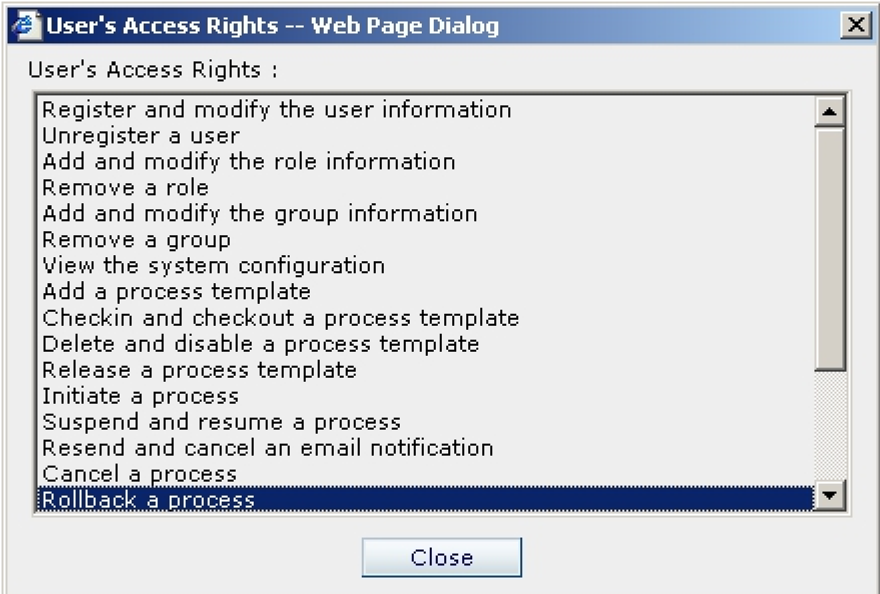
Requirements:

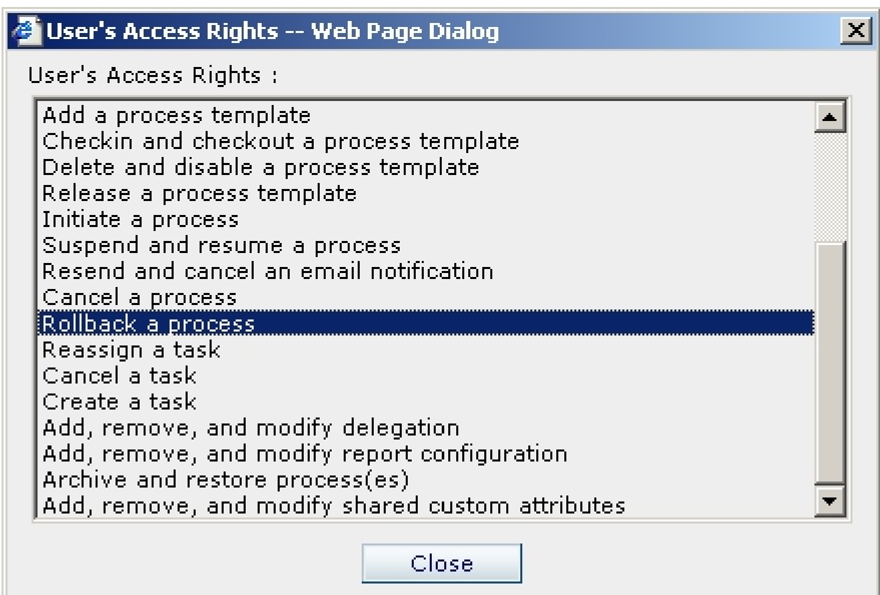
- The AgilePoint System User (as defined in the AgilePoint Server Configuration utility) should belong to the Active Directory domain.
- AgilePoint Server's Application Pool's Identity user account (as configured in IIS) needs to have read permissions to the Active Directory server and data.



View Access Rights dialog

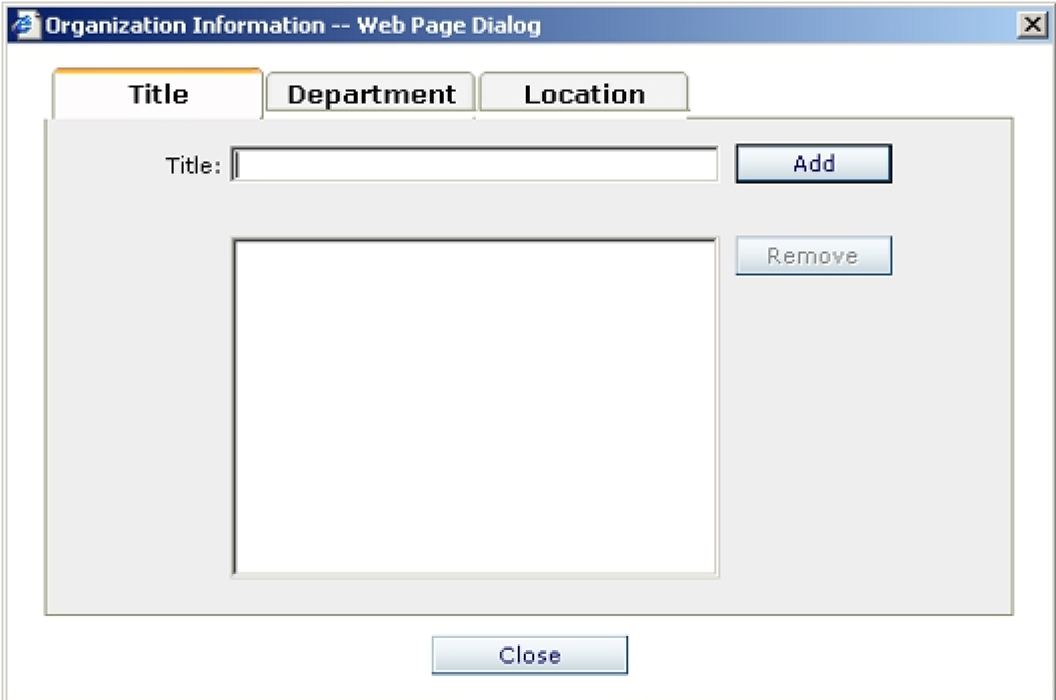
This dialog allows the administrator to view the complete set of AgilePoint access rights possessed by a specific AgilePoint Server user.

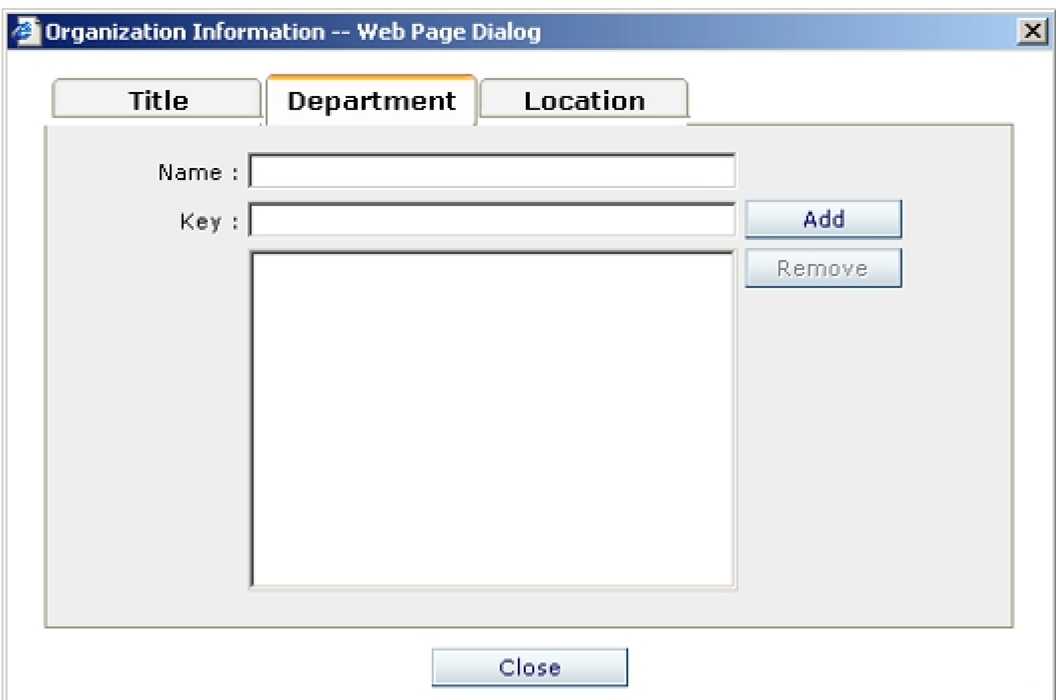


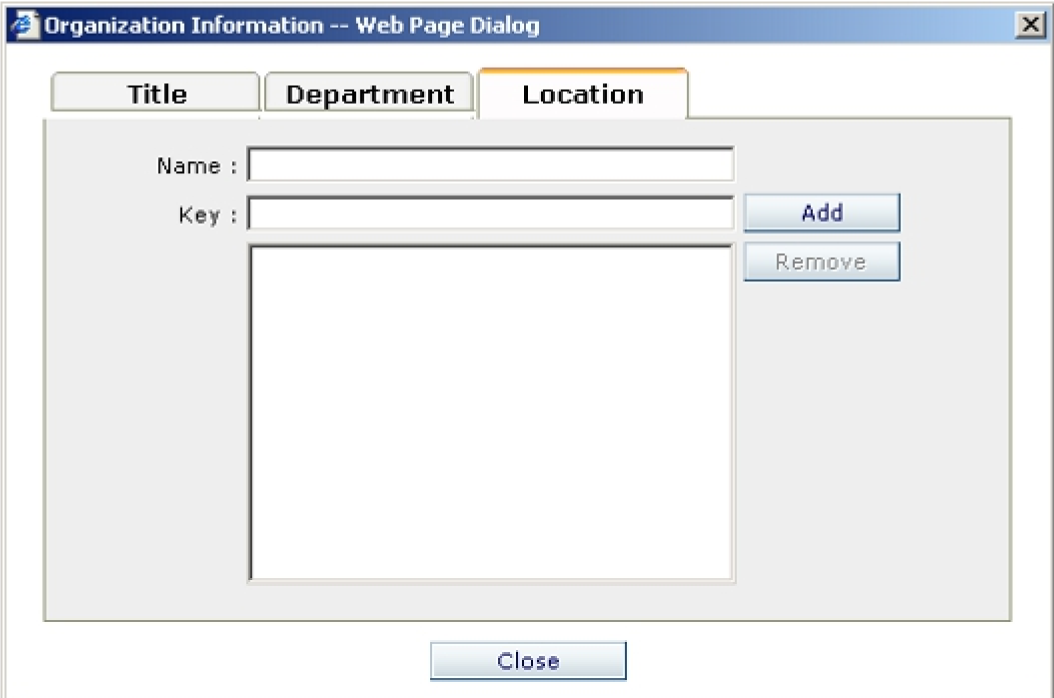


Organization Information Dialog

This dialog allows the administrator to configure the organization information that can be assigned to the AgilePoint Server users.

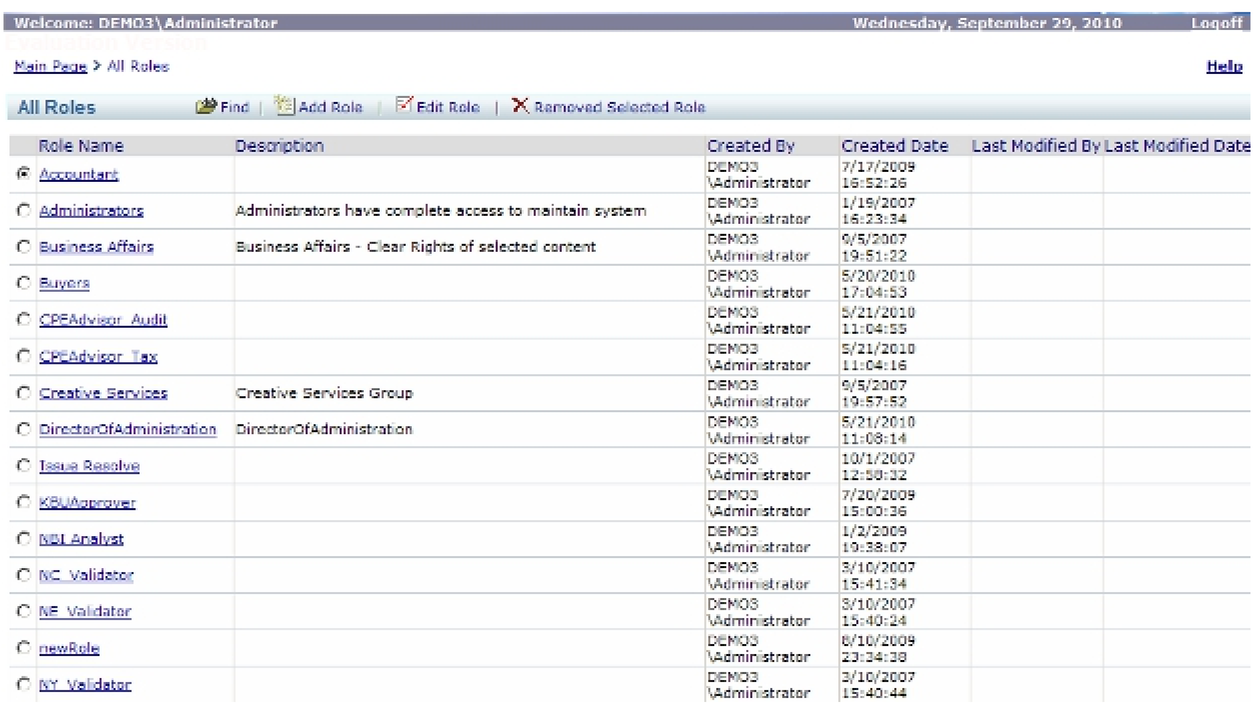

Organization Information -- Web Page Dialog
Title
Department
Location
Title:
Add
Remove
Close


Organization Information -- Web Page Dialog
Title
Department
Location
Name :
Key :
Add
Remove
Close



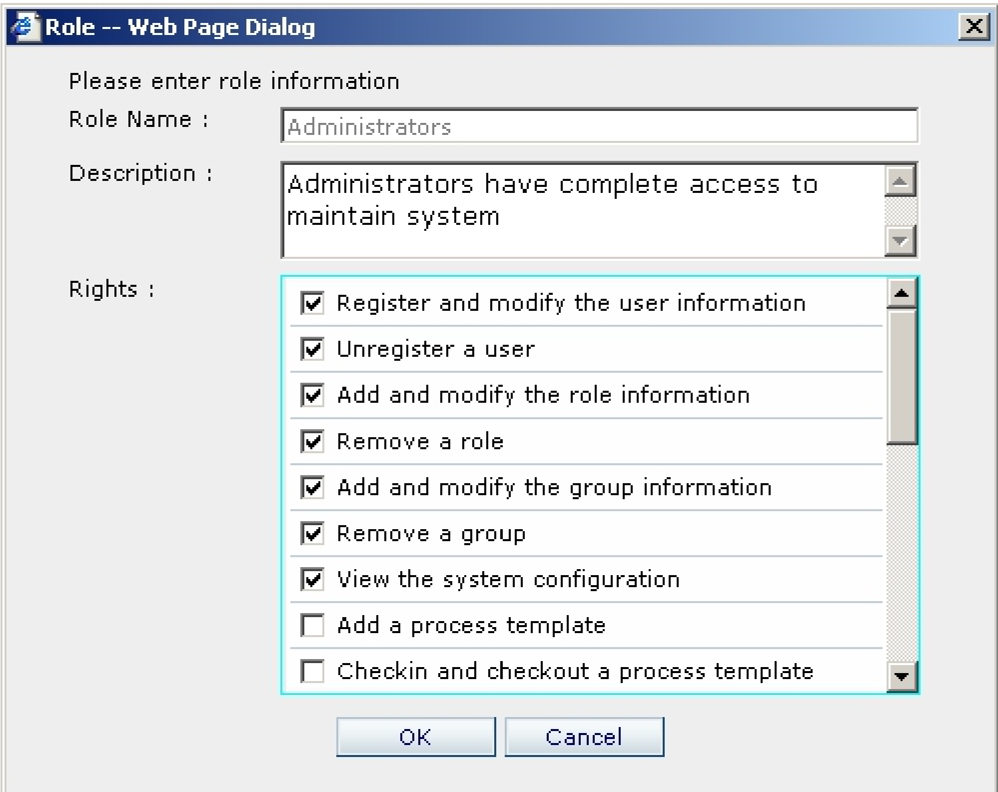
Roles Page

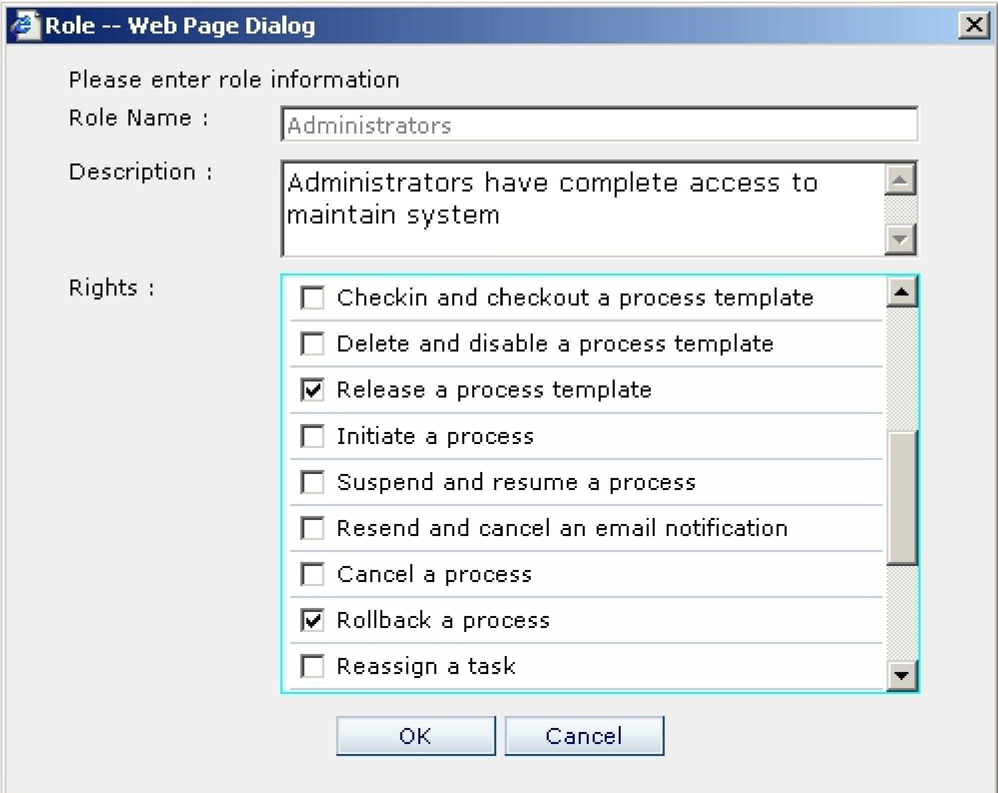
This page allows the administrator to view and update the roles that can be assigned to AgilePoint Server users.

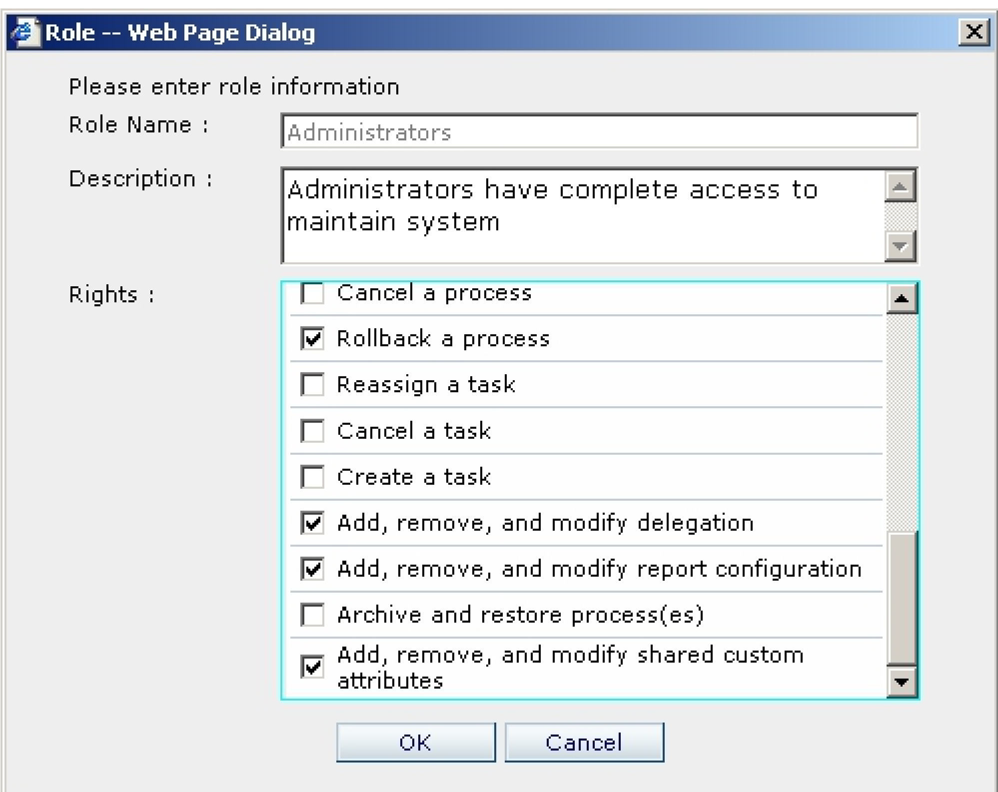


Add/Edit Role Dialog

This dialog allows the administrator to add or edit a role.

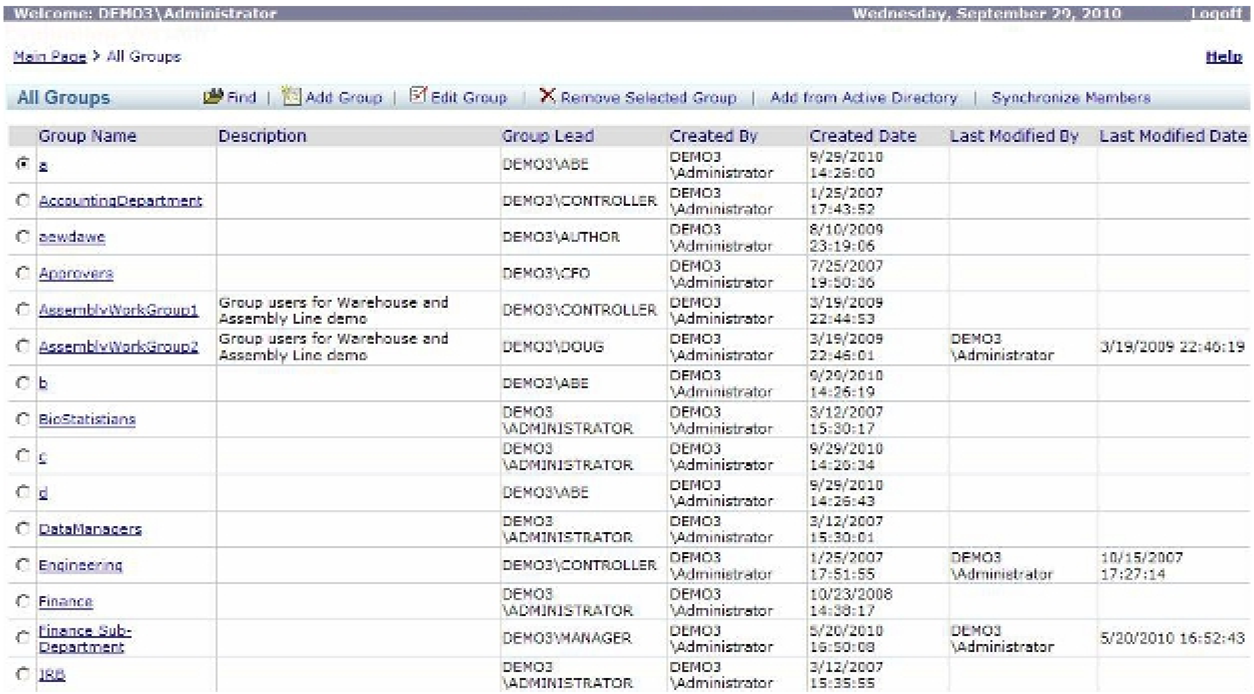



Role -- Web Page Dialog
Please enter role information
Role Name :
Administrators
Description :
Administrators have complete access to maintain system
Rights :
Checkin and checkout a process template
Delete and disable a process template
Release a process template
Initiate a process
Suspend and resume a process
Resend and cancel an email notification
Cancel a process
Rollback a process
Reassign a task
OK
Cancel


Role -- Web Page Dialog
Please enter role information
Role Name :
Administrators
Description :
Administrators have complete access to maintain system
Rights :
Cancel a process
Rollback a process
Reassign a task
Cancel a task
Create a task
Add, remove, and modify delegation
Add, remove, and modify report configuration
Archive and restore process(es)
Add, remove, and modify shared custom attributes
OK
Cancel

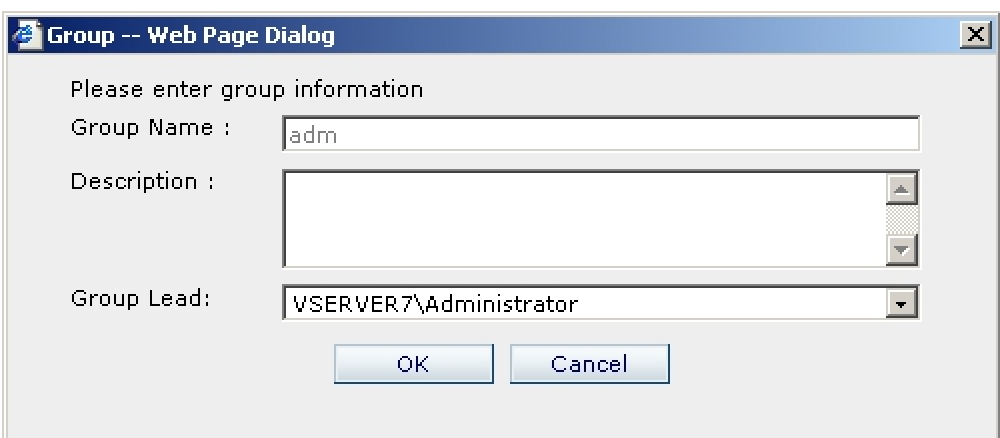
Groups Page

This page allows the administrator to view and update the groups that AgilePoint Server users can belong to.



Add/Edit Group Dialog

This dialog allows the administrator to add or edit a group.



The "Group Lead" is intended to specify the manager or head of the organizational unit that the group represents. Although this field doesn't really have any significant effect on the default behavior of AgilePoint at this time, it can be useful in certain situations.

For example, you could have a custom AgileShape that sends an email notification to the Group Lead of any Groups that the participant(s) of an activity belong to when a certain event occurs (such as escalation of overdue activities).

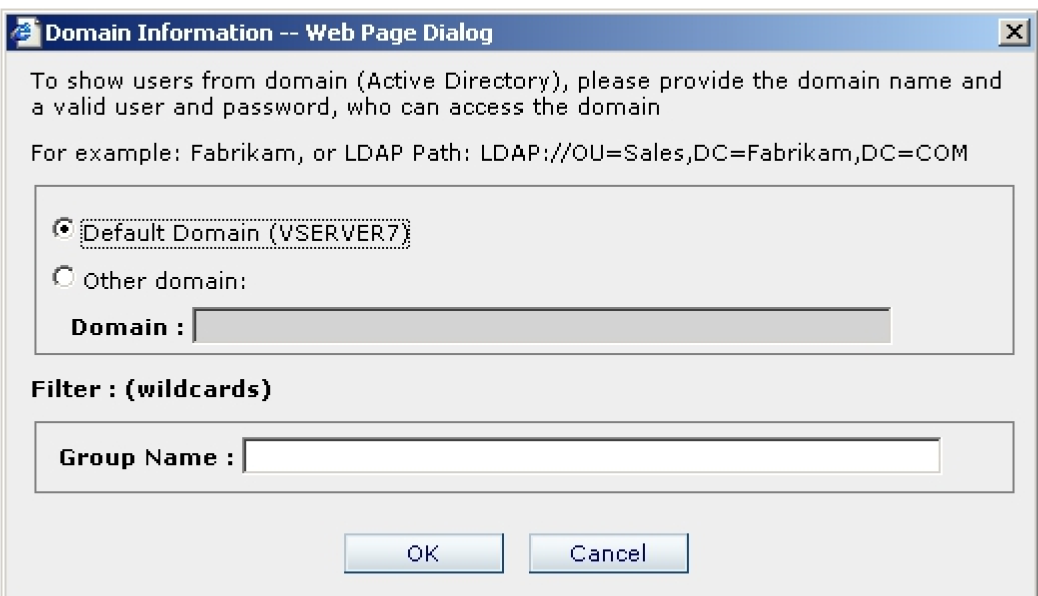
You could also use custom code to query the workflow database and build an organizational chart based on the relationship between group members, groups, and group leads.

Add Group From Active Directory Dialog

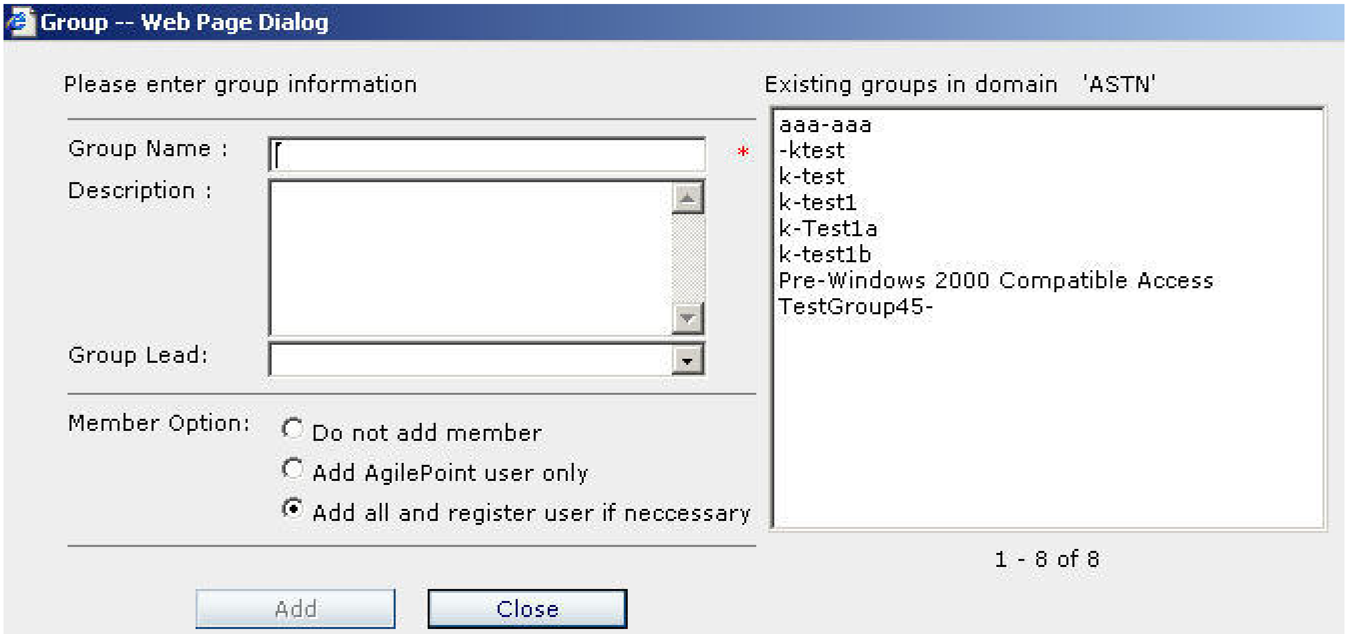
This dialog allows the administrator to add groups from an Active Directory data source. For group names, alphanumeric characters and special characters, or a combination of both are supported. The special characters that are supported include the dash (-) and underscore (_).

Requirements:

- The AgilePoint System User (as defined in the AgilePoint Server Configuration utility) should belong to the Active Directory domain.
- AgilePoint Server's Application Pool's Identity user account (as configured in IIS) needs to have read permissions to the Active Directory server and data.



After the search the following dialog appears:



You can now select a group from the list to add. Select a Group Lead for the group. You can also select one of the three options when adding new members from AD:

- Do not add member – The group will be created with the group lead as the only member
- Add AgilePoint user only – Only members in the AD group that have already been registered as an AgilePoint user will be added to the newly created AgilePoint group.
- Add all and register user if necessary – All of the members in the selected AD group will be added to the AgilePoint group. Any member in the AD group that has not been registered as an AgilePoint user will automatically be registered as an AgilePoint user.

Importing Nested Active Directory Groups

This feature supports the adding of a nested group from Active Directory to AgilePoint with the following behavior:

AgilePoint will not duplicate the entire Active Directory group structure when importing nested groups. Instead, all members of the top level group in Active Directory, as well as members in its sub-groups, will be added to a single group (same name as the top level Active Directory group) in AgilePoint.

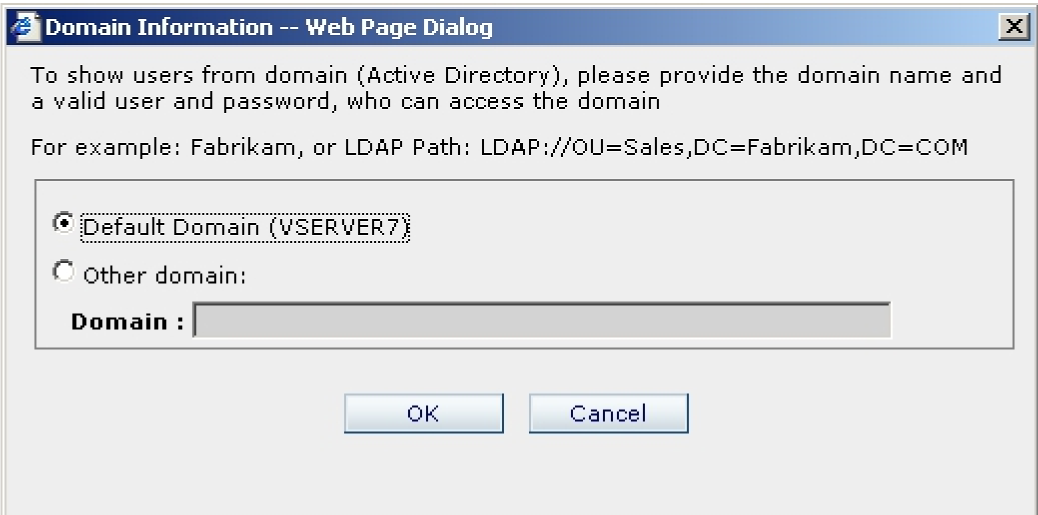
Synchronize Group Members dialog

This dialog allows the administrator to update the AgilePoint users' group memberships based on an Active Directory data source. Synchronizing members for a group will also enable the synchronization of members in the sub-groups in Active Directory. During synchronization, all of the members in each sub-group of an Active Directory group will be combined and added to a single AgilePoint group.

Select the group in the All Groups page of Enterprise Manager and click **Synchronize Members**. The Domain Information window appears.

Requirements:

- The AgilePoint System User (as defined in the AgilePoint Server Configuration utility) should belong to the Active Directory domain.
- AgilePoint Server's Application Pool's Identity user account (as configured in IIS) needs to have read permissions to the Active Directory server and data.



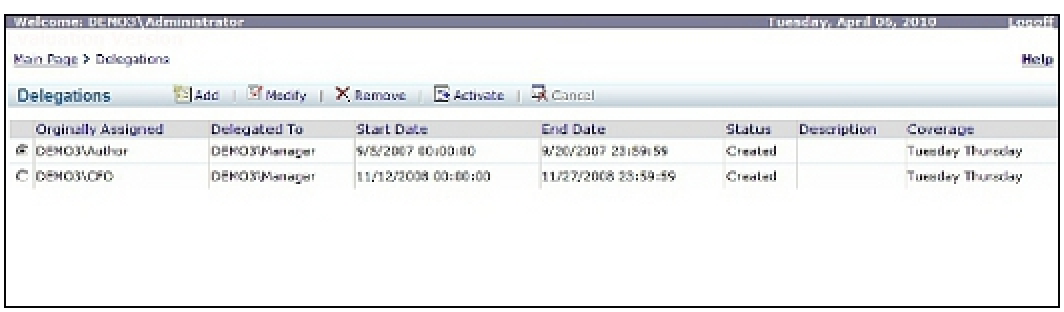
The members that are available for synchronization will have the Add or Remove link, which allows the member to be added or removed from an AgilePoint group.

Click **Apply All**. Clicking on the Apply All link will synchronize all the members that are available for synchronization.

Delegations Page

The Delegations page allows the administrator to view and manage delegation rules. Delegation is the temporary reassignment of tasks to another user -- usually a peer or subordinate. Delegation can be used, for example, to temporarily reassign a task when a user is out of the office.

To view the Delegations page, click the **Delegations** link on the Enterprise Manager Main Page. The list of delegations is shown.

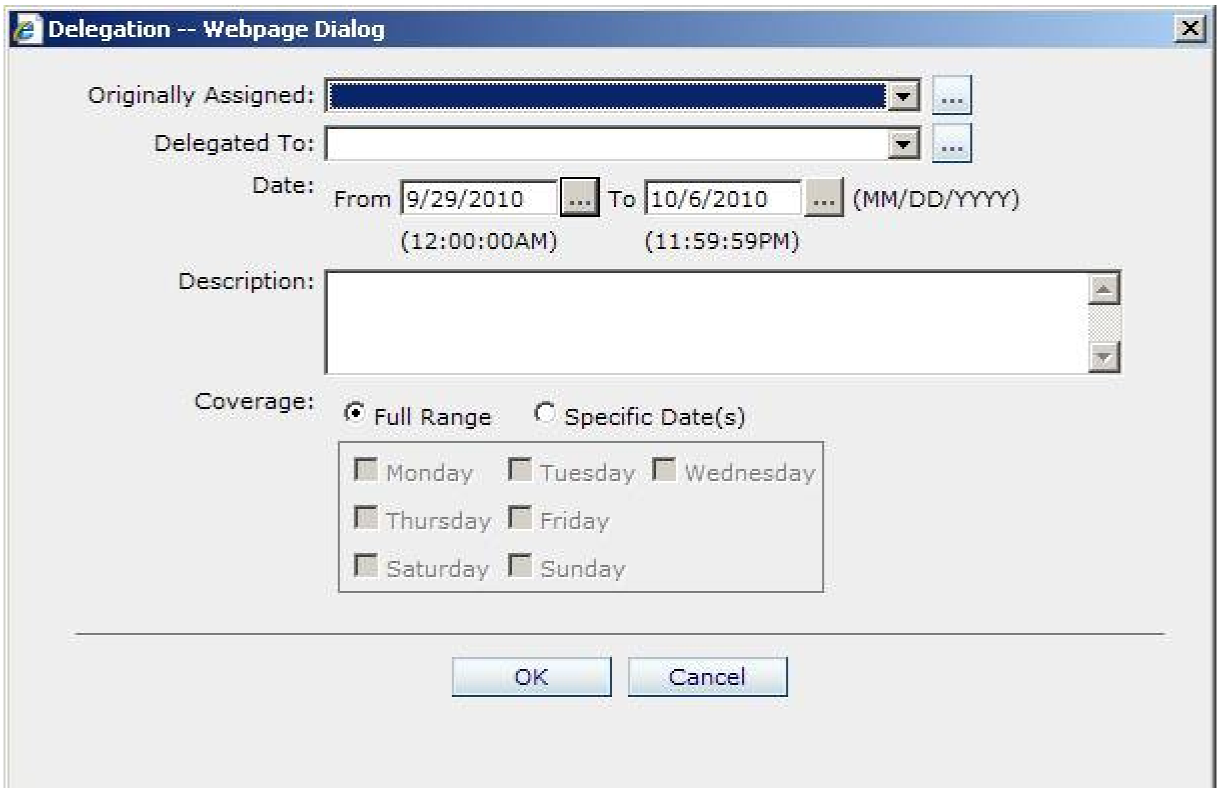


Add/Modify Delegation Dialog

The Delegation dialog allows the administrator to add or modify a delegation.

To add or modify a delegation:

1. Click the Add or Modify button on the Enterprise Manager Main Page. The Delegation dialog appears.



2. Select the Originally Assigned and Delegated To users from the drop-down lists provided.
3. Enter the From and To dates for which the delegation will take effect.
4. (Optional) Enter a description that provides information about why the delegation has taken place.
5. Select the Full Range option button to enable the delegation for all dates, or the Specific Dates option button and select the dates for which the delegation will take effect.
6. Click the OK button. The delegation is now modified or added to the list.

Activate/De-Activate a Delegation

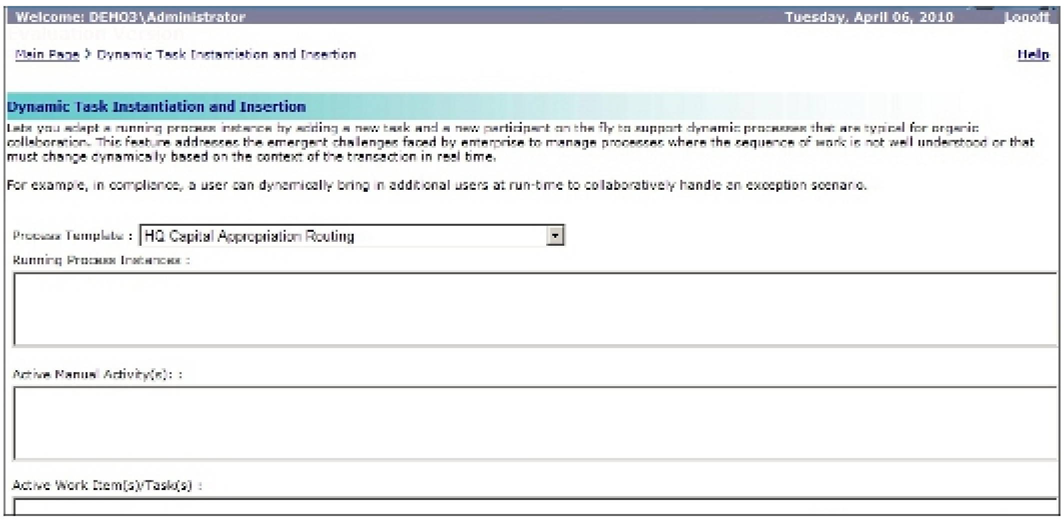
To activate a delegation, select the delegation from the list and click the Activate button. The delegation status is changed to **Active**. The delegation will now take affect based on the rules you defined.

To deactivate a delegation, select the delegation from the list and click the Cancel button. The delegation status is now changed to **Canceled**.

Dynamic Task Instantiation and Insertion Page

The Dynamic Task Instantiation and Insertion page allows the user to add additional participants to an active Process Adaptation AgileWork.

To view the Dynamic Task Instantiation and Insertion page, click the **Dynamic Task Instantiation & Insertion** link on the Enterprise Manager Main Page. The Dynamic Task Instantiation and Insertion page appears.



All the fields and buttons will be enabled if the Process Adaptation manual activity is active.

To add a participant to perform the task:

1. In the **Process Template** field, select the process template for which to add a participant to complete a task. The **Running Process Instances**, **Active Manual Activities**, and **Active Work Items/Tasks** for the process appear.
2. Select either **Parallel** or **Sequential**. Sequential means that the task will be delivered in a sequential fashion to 1 participant at a time. 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.
3. In the **Work to Perform** field, select the Work to Perform for which to add a participant.
4. The **Users** fields provide two list boxes, on the left shows all the users, the right shows the active participants of the Process Adaptation AgileWork. Select the user and click on **>>** to move to active users list and click Confirm. Based on the Approval Type (Parallel or Sequential) it creates a work items for those users.